



IAITAM ACE 2025

ITAM - Another Brick In The Wall

From Zero to Hero: Building an ITAM Program From Scratch

The OPERS Journey
April 23, 2025
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01

Overview

- OPERS
- Program Vision and Strategy
- Project Timeline

02

Project Milestones

- Assess
- Build
- Improve

03

Real World Examples

- Systems & Process Integrations
- SW License Compliance
- Key Performance Indicators


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01 Overview

The Ohio Public Employees Retirement System (OPERS)

- Since 1935, the Ohio Public Employees Retirement System (OPERS) has meant security and peace of mind to millions of Ohio's retired public workers and their families. OPERS provides retirement, disability and survivor benefit programs for public employees throughout the state who are not covered by another state or local retirement system.
- With total investment assets of \$114.1 billion as of Dec. 31, 2023, the Ohio Public Employees Retirement System is the largest state pension fund in Ohio and the 14th-largest state pension fund in the United States.
- Employers (3,689) – State, County, Municipalities, Miscellaneous, Libraries, Townships, Villages, Law Enforcement/Public Safety
- Pension Plan Membership (1,248,633)
 - Active Members – 297,827
 - Inactive Members – 730,139
 - Deferred Members – 220,667



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01 Overview

The Ohio Public Employees Retirement System (OPERS)

- OPERS is a quasi-state agency in Ohio providing pension benefits and health care access for retired state employees
- Primary business functions include institutional investing, finance, IT dev and ops, pension processing and member services
- Employees – 490
- Locations – Corporate Offices and Disaster Recovery Site
- Work Arrangements – In Office and Work-From-Home

ITAM Specifications

- Device Assets
 - Computers – 1,925
 - Servers – 576
 - Peripheral Assets (network, monitors, docking) – 1,929
- Software Applications
 - Commercial - 496
 - Component - 664
 - Freeware - 621



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01 Overview

Where did we start?







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01 Overview


Vision and Strategy



Organizational Engagement


Source of Truth



Centralized Services


Quality Analytics


Positive ROI


Risk Mitigation

Six
Primary
Program
Objectives



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01 Overview

Project Timeline – Year 1

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build

Q2 2023


- Project Kickoff
- Policy, RACI & Process Development
- Inventory Assessment
- Systems Evaluation
- Process Review

Q3 2023

- Systems Training
- HW Asset Data Analysis
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting

Q4 2023

- Systems Upgrade
- SW License Baseline
- Thin Client Integration
- Procurement, PO, Invoice Integration



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01 Overview

Project Timeline – Year 2

Q1 2024

- Build SaaS Presence
- Set Inventory Schedule
- Program Reassessment
- Add Servers to HAM

Q2 2024


- Reporting Schedule
- Build Program KPIs
- Analyze Data Anomalies
- Add Network Devices

Q3 2024

- Structure Internal Audits
- Develop Contract Database
- Automate Reporting
- Integrate Value-added Processes

Q4 2024

- Pursue License Compliance
- Explore NIST Standards
- Begin Continuous Improvement Strategy




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02 Project Milestones

Project Milestones

1. Assess the program's current state
2. Build the project plan and team
3. Institute policy, governance and procedures
4. Build data repository
5. Develop software license baseline
6. Integrate value-added processes
7. Implement key performance metrics and reporting
8. Begin continuous improvement strategy



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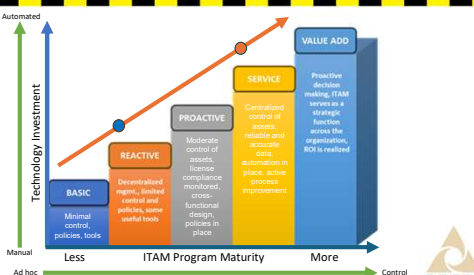
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02 Project Milestones


1. Program Assessment

Q1 2023

- Industry Research
- Strategy Build
- Program Assessment
- Project & Team Build



Technology Investment (Manual to Automated)
Control (Ad hoc to More Control)
ITAM Program Maturity (Less to More)



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02 Project Milestones

1. Program Assessment

People Functions Include:

- Authority
- Plan
- Team
- Stakeholders
- Program Management
- Project Management

Process Functions Include:

- Integration
- Improvement Plan
- Periodic Evaluation
- Transition
- Request
- License and Contract
- Acquisition
- Deployment
- Disposal/Reclaim

Technology Functions Include:

- Hardware Inventory
- Software Inventory
- Entitlement
- Reporting
- Verification

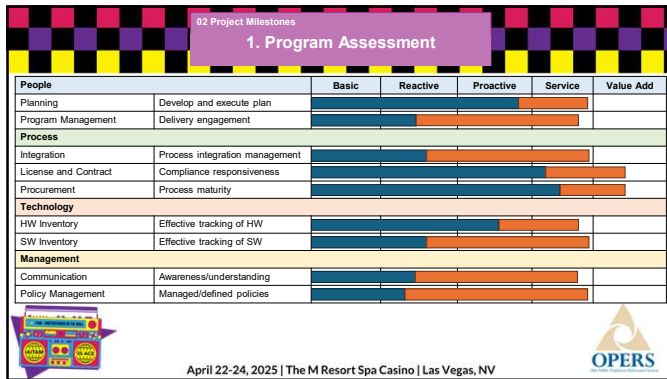
Management Functions Include:

- Best Practices
- Comm/Education
- Financial Mgmt
- Compliance and Legal
- Policy Mgmt
- Vendor Mgmt

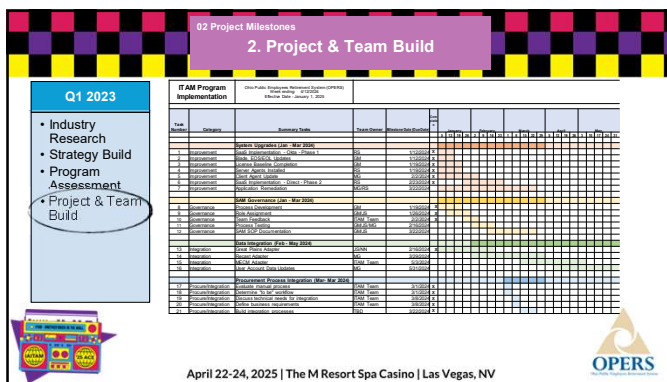


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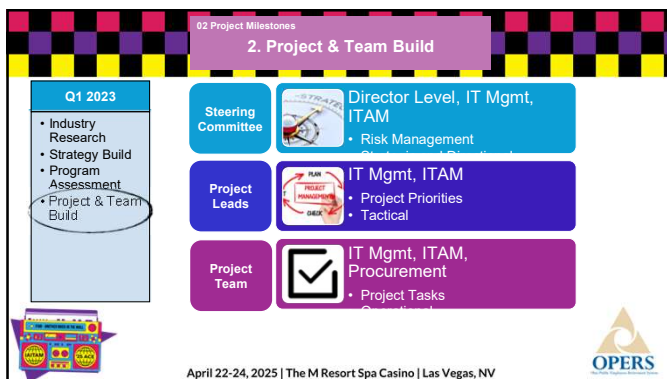
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Q3 2023

- Systems Training
- HW Asset Data Analysis
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting

02 Project Milestones 4. Build Data Repository

Asset Types	Asset Locations	Asset Roles	Asset Statuses
Laptop	Office	Prod/Dev	Installed
Workstations	Work-From-Home	Test	In Storage
Thin Client	Disaster Recovery	Cold Standby	Retired

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Q3 2023

- Systems Training
- HW Asset Data Analysis
- Lifecycle Process Development
- Issues Tracker
- Trend Reporting

02 Project Milestones 4. Build Data Repository

Laptops

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Q4 2023

- Systems Upgrade
- SW License Baseline
- Thin Client Integration
- Procurement, PO, Invoice Integration

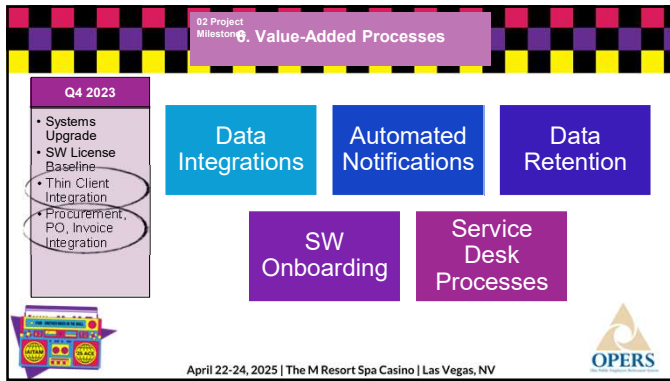
02 Project Milestones 5. SW License Baseline

What licenses do I track?	What data is important?	How do I reconcile?
<ul style="list-style-type: none"> • High Volume • Organizational Value • Audit Risk • Dollar Value 	<ul style="list-style-type: none"> • Cost • Purchase, Install & Use • Use Rights • Exclusions 	<ul style="list-style-type: none"> • Product Owner • Vendor Portal • Systems Support • Vendor

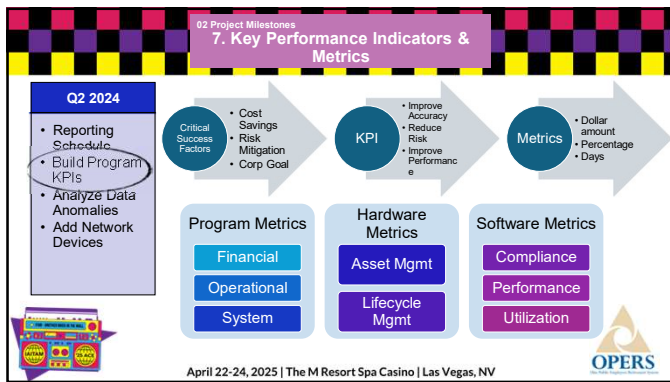
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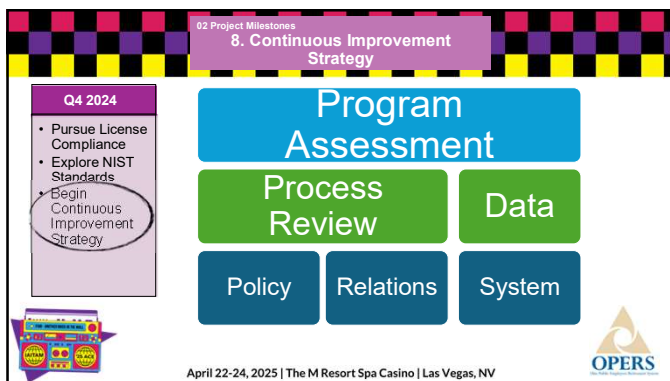
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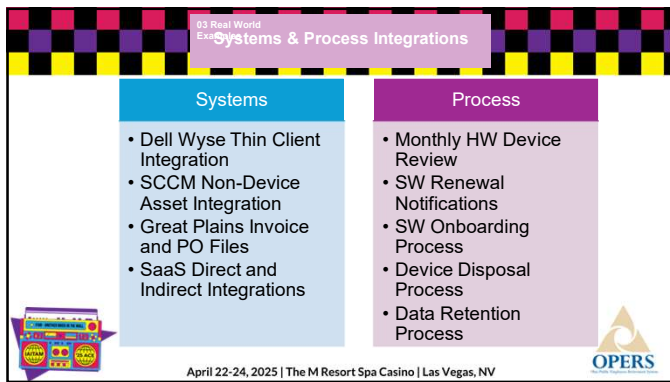
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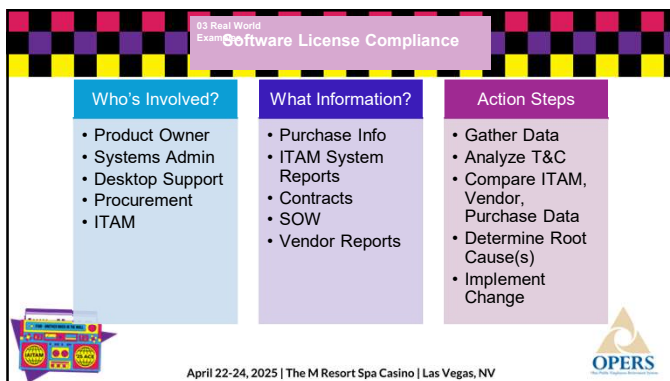
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03 Real World Example

Software License Compliance

What could possibly go wrong?

Use Rights

Device Role

Version Upgrade


License Type

Unlicensed User

Assigned Application

Exclusion

SKU




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03 Real World Example

Key Performance Indicators

Category	Metric	Baseline	Goal	Current
System	Active devices not inventoried for more than 30 days	2.83%	<10%	1.71%
Asset Management	Inventoried devices not recognized as assets	1.90%	<2%	1.95%
Lifecycle Management	Laptops more than 4 years old	23.24%	0%	0.50%
SW Compliance	Commercial applications with > n-2 versions	9.76%	<10%	6.41%
SW Utilization	License entitlement usage percentage	26.69%	>85%	17.79%
SW Utilization	License entitlement installation percentage	85.23%	>90%	31.88%



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Questions

1. We identified 8 key milestones in our program development process. What other program milestones were critical in your journey?

2. How do you assess your program maturity? How often?

3. What has been the most challenging aspect of program development or growth?

4. What process or data integrations have provided the most value? Least value?



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Key Takeaways

1. Pace yourself
2. Find what fits the needs of your organization
 - a. Program size
 - b. Scope
 - c. Value
3. Be willing to try new things
4. Build functions and processes that bring value
5. Measure, measure, measure
6. Make lasting connections with key stakeholders





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