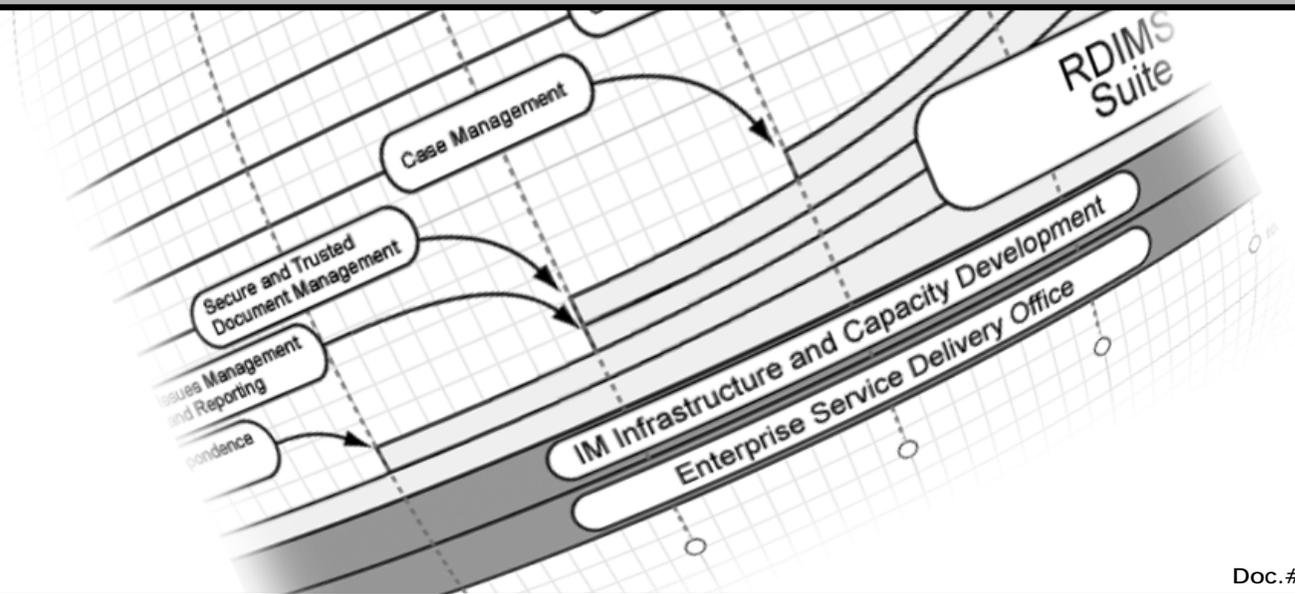# RDIMS

Presentation to:

Management of Government Information (MGI)

Senior Officials

Gale Blank, Director General, Shared Products and Service Development, ITSB/PWGSC

November 25th, 2004

Doc.#200750

RDIMS – Presentation MGI Senior Officials

Purpose:

- *To inform MGI Senior officials about RDIMS as an Enabler for Shared Service Delivery*

- *RDIMS Overview*
    - *Background*
    - *Status Report on RDIMS*
    - *Report on RDIMS Board of Directors*

| ENTERPRISE INFORMATION MANAGEMENT SOLUTIONS DELIVERY OFFICE | Agenda | RDIMS Products & Services | Business Operations | Organization & Governance | Next Steps | Decisions Required | 2 |

Status Report on RDIMS

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1. *Background*

2. *RDIMS Products and Services*

3. *Business Operations*

4. *EIMSD Organization and Governance*

5. *Next Steps*

6. *Discussion*

Background

GoC IM IMPERATIVES and RDIMS

GoC IM imperative:

"to improve, GoC-wide, the collection and alignment of high quality information in support of full transparency and informed decision-making"

Expenditure Review Committee Memorandum, April 2004

Jim Judd, Secretary of the Treasury Board

RDIMS:

RDIMS is an enterprise records and document management solution designed to improve the GoC's information management practices by electronically enabling consistent document management and record keeping, and improved access to the sharing of information across the GoC.

RDIMS establishes a platform enabling the development of shared business solutions.

RDIMS is the critical information foundation and point of integration for knowledge tools GoC-wide.

Policy on the Management of Government Information:

"Ensure that information under the control of the Government of Canada is managed effectively and efficiently throughout it's life cycle."

Background

RDIMS COMMUNITY FINDINGS

The current RDIMS deployment model will not get us where we want to go!

RDIMS BoD (Board of Directors) recommendations

"Way Ahead" Strategy - Fall, 2003

...that the **RDIMS value proposition** *focus upon business process solutions as a complement to basic DM/RM functionality, i.e. "business pull vs. IM push."*

...to **establish a central service delivery arm** *to operate a knowledge management capability in support of RDIMS operation, management, and evolution across the GoC.*

TBS Enterprise Licence Acquisition and Implementation Funding

Community Support **X** Mandate **X** Funding **X**

Background

RDIMS STATUS

TBS Creates the Opportunity

Launch September 23 2004 ("IM Day")

March 2004 RDIMS enterprise licence acquired by TBS at a cost of $23.3M.

March 2004 $8 million per annum for three years allocated by TBS for deployment of RDIMS and the development of business solutions built on RDIMS.

RDIMS has a self-funded, highly engaged, and creative user community which, in partnership with innovative vendor stakeholders, are evolving and enhancing the basic RDIMS functionality to drive take-up to the critical mass required to enable the realization of the GoC imperative.

Currently 37,000 RDIMS deployments across 38 departments; RDIMS Board of Directors represents 35 departments and agencies.

TARGET:

March 2007

100,000 deployment

Value-for-money enterprise procurement by TBS.

March 2004

ITSB creates EIMSDO and launches first enterprise shared products and services offering

March 2007

Background

ITSB OPPORTUNITY
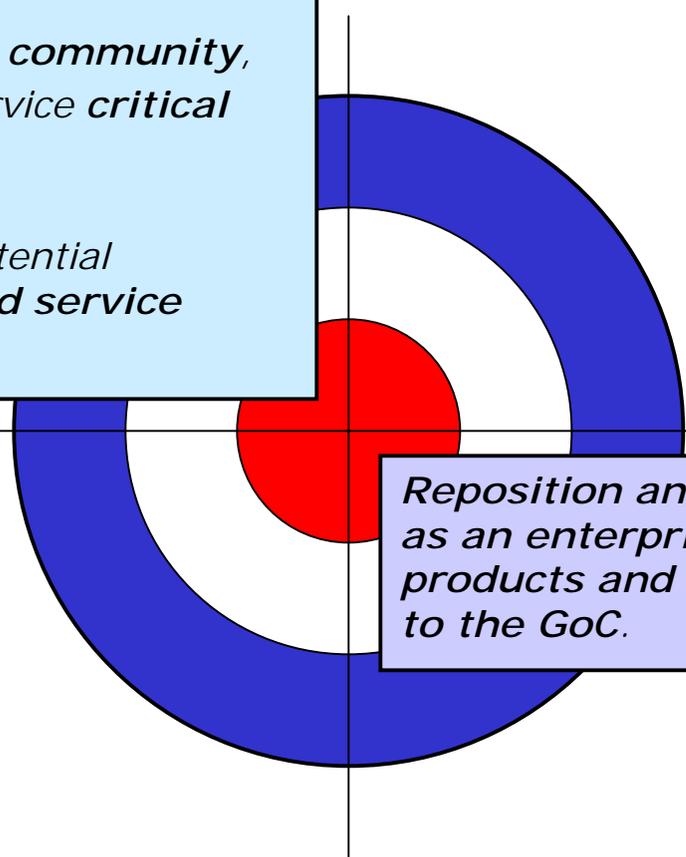
To deliver RDIMS:
- a **fully-funded**
- **mature product**
- supported by a **strong user community**,
- aligned with ITSB shared service **critical success factors**;

which represents:
- a **low-risk/high-payoff** potential opportunity as a **first shared service offering** from ITSB.

Reposition and re-brand ITSB as an enterprise shared products and services provider to the GoC.

RDIMS Products and Services

ITSB OBJECTIVES

Achieve "enterprise" status through 100,000 successful deployments of RDIMS by end of 2006-2007.

Establish a self-sustaining business and service delivery model with focus on value, market sensitivity and client engagement.

Position RDIMS as a platform for shared business solutions.
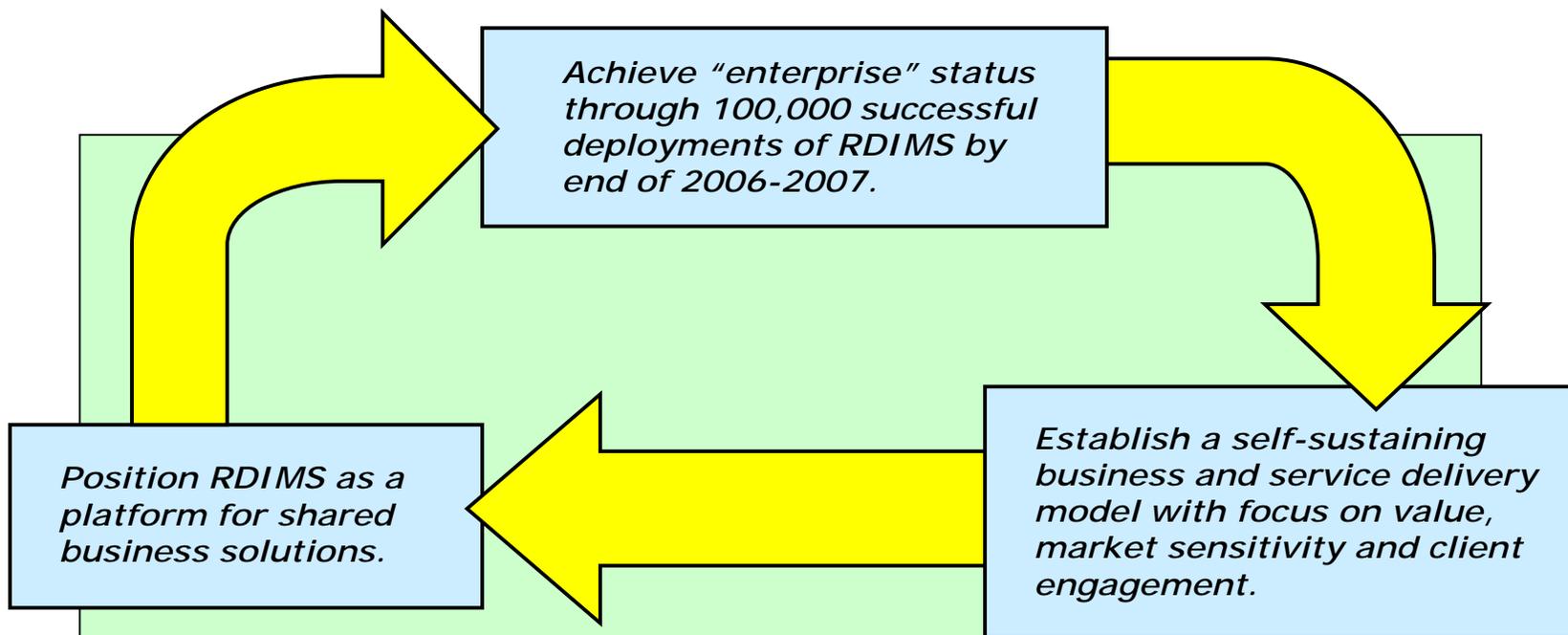
Reposition and re-brand ITSB as provider of enterprise shared products and services to GoC.

RDIMS Products and Services

DELIVERABLES

RDIMS Product and Service Offerings

Products	Services	Community Leadership
–Market and distribute RDIMS product and licensing. *–Provide framework and support for the development of business solutions built on the RDIMS platform.*	*Provide and/or source professional services and expertise for the assessment, configuration, training, and maintenance of RDIMS.*	*Provide visibility, points of engagement, and a support environment for the RDIMS community.*

• Licences- Management and distribution of RDIMS platform
• Prototypes - Development
• Business solutions add-ons (e.g., *Executive Correspondence Management* solution)
• New releases - Project management
• Quality Assurance
	• Management consulting
	• Technical support
	  • Configuration
	  • Expertise
	• Training
		• Stakeholder engagement
		• Secretariat for community
		• Benefits tracking
		• Vendor management
		• Sharing best practices

RDIMS Products and Services
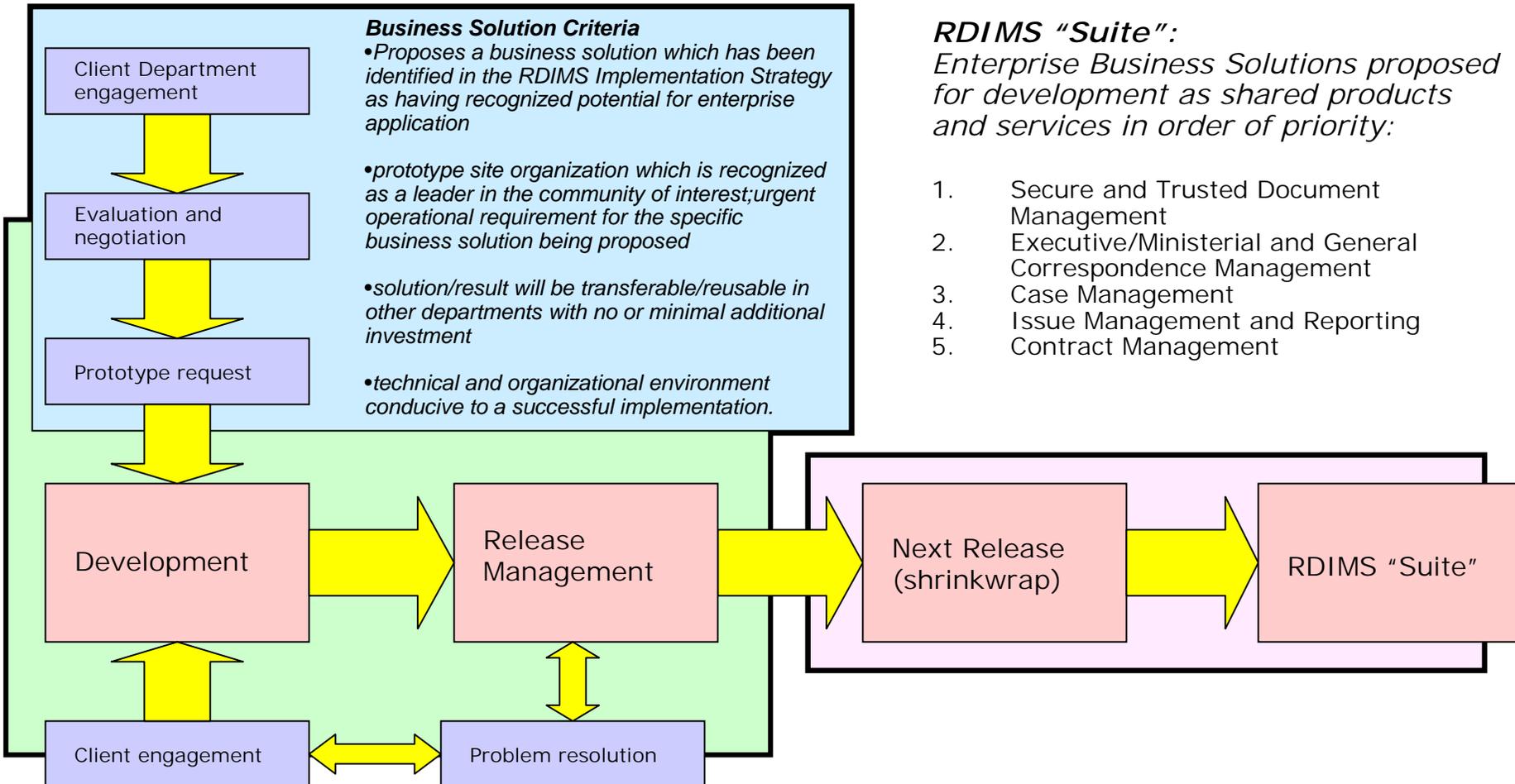
RDIMS SYSTEM FUNCTIONS AND RESOURCES

Operational Resources

Operation	Function	Activity		Resources
EIMSDO RDIMS delivery and service functions	*Community Leadership*	*Strategic planning*	*Resourcing*	Executive Management and Administration
			Marcom	Marcom
		Client engagement	*Product promotion*	Project Office
		Community development		Release Management
	Management Consulting	*Maintain repository of re-usable elements*		
		Develop training packages		
	Deployment Strategies	*Architecture development*		
		Configuration service		**$700k/FY**
	Licence Management	*Contract negotiation and administration*		
		Software and documentation designation		*Manager – Configuration*
		Core problem resolution and release management		*Manager - Architecture*
EIMSDO RDIMS business solution development functions	*Community Leadership*	*Business solution productization*		*Manager – Requirements Manager – Mapping Technical Analyst Functional Analyst Programmers*
	Management Consulting	*Requirements definition and prototype development*		*As required resources: Procurement Manager Records Specialists*
		Prototype project management		*Functional Analysts Quality Assurance*
		Analytical support and technical expertise		*Integration Development Security Analyst*
	Deployment Strategies	*Design architecture*		*Network Architect*
		Develop integration		*Training Developer* **$500k-1.5M/solution**
		Configure business solutions		*Change Mgt./Per*
		Solution implementation services		*Vendor resources*
		Release management of business solutions		

RDIMS Products and Services

PROTOTYPE DEVELOPMENT PROCESS

RDIMS is a platform for developing new shared business solutions

Business Solution Criteria
- *Proposes a business solution which has been identified in the RDIMS Implementation Strategy as having recognized potential for enterprise application*

- *prototype site organization which is recognized as a leader in the community of interest;urgent operational requirement for the specific business solution being proposed*

- *solution/result will be transferable/reusable in other departments with no or minimal additional investment*

- *technical and organizational environment conducive to a successful implementation.*

RDIMS "Suite":
Enterprise Business Solutions proposed for development as shared products and services in order of priority:

1. Secure and Trusted Document Management
2. Executive/Ministerial and General Correspondence Management
3. Case Management
4. Issue Management and Reporting
5. Contract Management

Client Department engagement

Evaluation and negotiation

Prototype request

Development

Release Management

Next Release (shrinkwrap)

RDIMS "Suite"

Client engagement

Problem resolution

RDIMS Products and Services

POTENTIAL GROWTH STRATEGY

The RDIMS platform: a "Suite" of shared products and services

Future Market Opportunities

September 16 2004 ○ March 31 2005 ○ September 30 2005 ○ March 31 2006 ○ September 30 2006 ○ March 31 2007 ○

Client Host
Client Community
Vendors

Prototype
Development

Contract Management

Issue Management
and Reporting

Case Management

Executive/Ministerial
Correspondence Mgt.

Secure and Trusted
Document Management

RDIMS "Suite"

RDIMS

IM Infrastructure and Capacity Development

Enterprise Service Delivery Office

value

○ 37,000 licenses   ○   ○   ○   ○   ○ 100,000 licenses   ○

time

Stakeholders
Partners

Expected "shrinkwrap" offerings

RDIMS Business Operations

INTERIM RESOURCING STRATEGY

1: Operating Budget

EIMSDO		2004-2005	2005-2006	2006-2007
Business Operations		700	750	750
Business Solutions		2,100	7,750	7,250
IM Infrastructure and Capacity Development		1,200	2,500	1,000
(numbers in 1,000s)	Total	4,000	11,000	9,000

Strategic review

2: Annual Client Costs

Client Cost ANNUAL		2004-2005	2005-2006	2006-2007	2007-2008
(per seat)	RDIMS licence	0	0	0	0
	Support (CGI contractor)	104	93	87	50
	Help Desk				
	Problem Resolution				
	Enhancements				
	Modifications				
	Upgrades				

Licence residuals (est.)

3: One-Time Client Costs

Client Cost Per Seat		
(per seat)	Training	200
	Site readiness	900
	IM Capacity	
	File Plan	
	Business Plan	
	Implementation	
Business Solution Development		Negotiated (MOU)

Business Solution development cost: $500k-1.5M/solution

RDIMS Business Operations

INTERIM RESOURCING STRATEGY

4: Resource Allocation

		2004-2005			2004-2005	2005-2006
	Q1	Q2	Q3	Q4	TOTAL	
Management & Governance	38	38	42	42	160	
Strategic Planning & Market Development	45	45	50	50	190	
Project Management & Reporting	50	50	50	50	200	
Office Infrastructure & Administration	10	22	65	53	150	
Total	143	155	207	195	700	750
Core Components Development					200	
Product Integration					500	
Product Enhancement					200	
Core Project Technical Resources & Infrastructure					1,050	
Knowledge Repository & COP's					50	
Just-in-Time Training					100	
Total					2,100	7,750
Architecture					650	
Meta Data Standard					100	
Classification, Retention and Disposition					300	
Digital Preservation of Archival e-info					100	
IM Community Development					50	
Total					1,200	2,500
Grand Total	143	155	207	195	4,000	11,000

RDIMS Funding Proposal Evaluation Criteria

See Annex A

A. *Initial Qualification Criteria*

B. *General Evaluation Criteria*

    1. *Clear Statement of Proposed Initiative(s)*

    2. *Robust Project Management Framework with Clearly Defined Deliverables and Accountability*

C. *Additional Specific Criteria with respect to:*

    1. *Business Solution Development Proposals*

    2. *IM Infrastructure Proposals*

    3. *IM Capacity Development Proposals*

RDIMS Business Operations

PERFORMANCE MEASUREMENT

A Balanced Scorecard Approach:

FINANCIAL VIABILITY AND SUSTAINABILITY

1. Acquisition Cost	Value-for-money/Enterprise acquisition
2. Cost of implementation	Costs reduced through attenuation, scaling, sharing
3. Cost of Sustaining Operations	On target to achieve operational goals
4. Cost of Solutions Development	Scalable to client and central funds availability
5. Investment in IM Infrastructure	Projects prioritized and deliverables controlled through MOUs to achieve
6. Investment in IM Capacity Development	• "Just-in-Time" Training for basic RDIMS • Prioritized IM Capacity/Supporting Process Training

CUSTOMER SATISFACTION

1. Products
   • Licence management
   • Platform development
   • Release management
2. Services
   • Management Consulting
   • Technical Support
   • Training
3. Community Leadership
   • Strategic Planning and Resourcing
   • Secretariat
   • Benefits Tracking
   • Vendor Management
   • Best Practices

VISION/STRATEGY

Positioning (re-branding) ITSB as shared-service provider to the GOC through the successful launch of RDIMS as first shared service.

IMPROVING INT PROCESS

1. Internal to GoC
   • Track RDIMS impact upon information management, information sharing, and communications
2. Internal to ITSB
   • Budget approval mechanism
   • Funding assessments (Business Solutions, IM Infrastructure and Capacity Building)
   • Release Management /QA
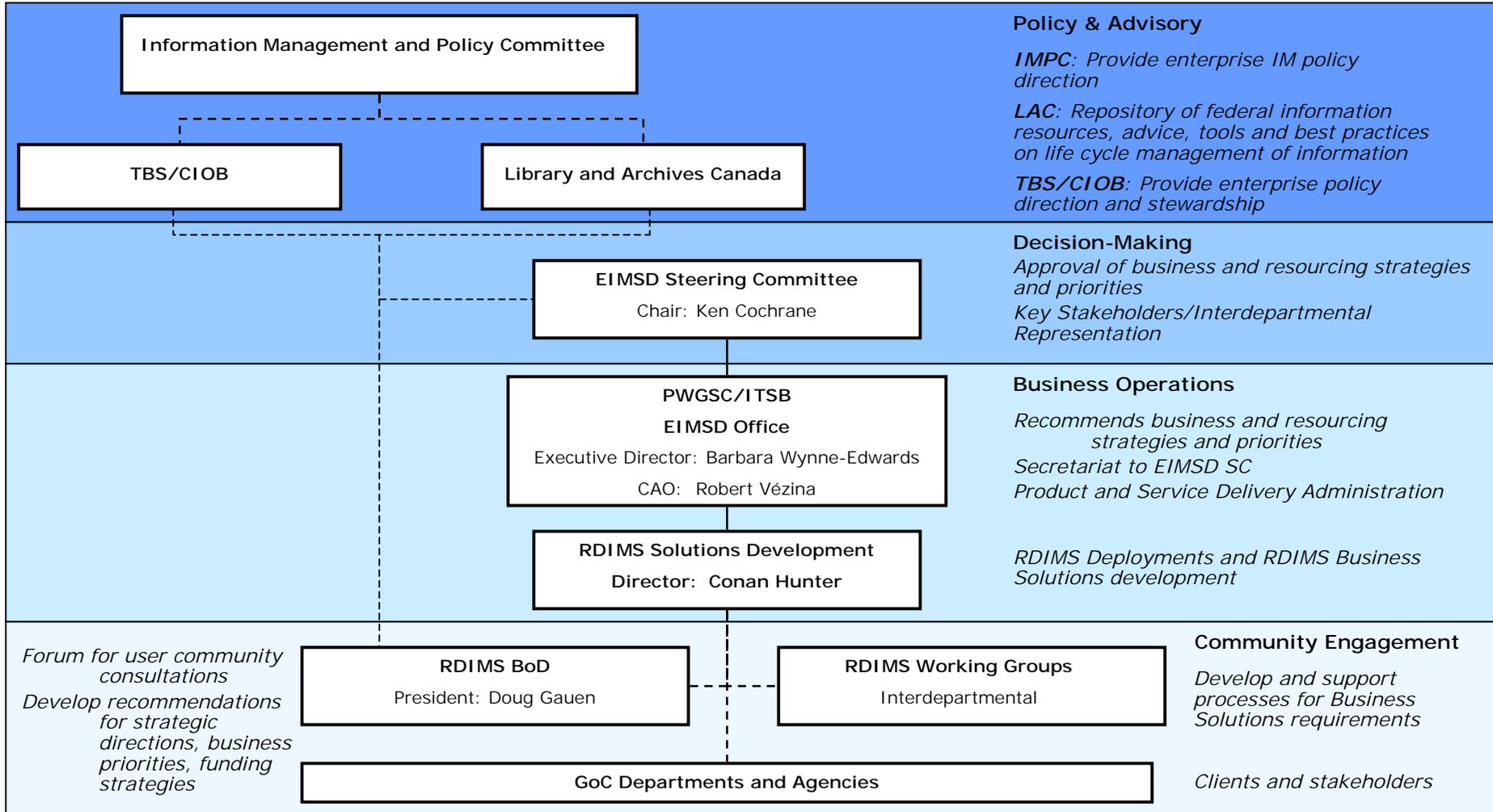   • Monitoring and Evaluation

ORG EXCELLENCE

1. Provider of choice / Community leader of client-service offerings
2. Delivering cost-effective enterprise shared services
3. Sustainable product and service business model

RDIMS Business Operations

RISKS AND MITIGATION

Risks	Mitigation Strategy
• Failure to meet target deployment of RDIMS to achieve enterprise benefits	• $24M GoC investment in business solution "pull" vs. tech "push" and central support services • Key stakeholders engaged in governance with shared accountability • Aggressive client engagement/marketing strategy and incentives such as; cost sharing on training and site readiness requirements • Year 1 assessment of RDIMS implementation strategy - in the extreme **mandate** RDIMS/Business Solutions
• IM Infrastructure projects fail to deliver essential requirements for RDIMS	• Full engagement of TBS/CIOB IMPC and LAC • MOUs between PWGSC/ITSB and respective organization with specific deliverables and timeframes
• IM capacity within GoC fails to mature in time	• as above • development and subsidizing of "Just-in-Time" training for RDIMS implementation • prioritizing and subsidizing training for essential IM capacity resources e.g. Records Admin. and Functional Classification

EIMSD Organization & Governance

PROPOSED GOVERNANCE

Information Management and Policy Committee

TBS/CIOB

Library and Archives Canada

Policy & Advisory

IMPC: Provide enterprise IM policy direction

LAC: Repository of federal information resources, advice, tools and best practices on life cycle management of information

TBS/CIOB: Provide enterprise policy direction and stewardship

EIMSD Steering Committee

Chair: Ken Cochrane

Decision-Making

Approval of business and resourcing strategies and priorities

Key Stakeholders/Interdepartmental Representation

PWGSC/ITSB
EIMSD Office

Executive Director: Barbara Wynne-Edwards

CAO: Robert Vézina

Business Operations

Recommends business and resourcing strategies and priorities

Secretariat to EIMSD SC

Product and Service Delivery Administration

RDIMS Solutions Development

Director: Conan Hunter

RDIMS Deployments and RDIMS Business Solutions development

Forum for user community consultations

Develop recommendations for strategic directions, business priorities, funding strategies

RDIMS BoD

President: Doug Gauen

RDIMS Working Groups

Interdepartmental

Community Engagement

Develop and support processes for Business Solutions requirements

GoC Departments and Agencies

Clients and stakeholders

Organization and Governance

EIMSD STEERING COMMITTEE MEMBERSHIP

Members/Major stakeholders:

Chair: Ken Cochrane

TBS/CIOB: Jim Alexander, Alexa Brewer, Gary Doucet, Denis Thiffault

Library & Archives Canada: Marilyn Osborne, Peter Bruce

PWGSC/ITSB: Gale Blank, Barbara Wynne-Edwards, Robert Vézina, Helen Jelich (CMS Representative)

RDIMS Board of Directors: President, Doug Gauen

Expanded Membership
Up to 5 GoC dept. reps. (3 large/2 small)

EIMSD Office Business Operations

EIMSDO SCOPE

Recommended scope by RDIMS BoD:

Objectives for a central service delivery arm:

1. promote a consistent RDIMS implementation across the GoC that is responsive to common business process requirements

2. lower the overall cost of implementation, and

3. address any capacity issues that may be precluding a quick and successful implementation

Functions of a central service delivery arm:

1. identify best practices & subject matter experts in various areas of RDIMS

2. assist departments/agencies in finding and using relevant knowledge for their RDIMS implementations

3. distribute and manage RDIMS licenses, and operate a central repository of "reusable components" supported by "Communities of Practice"

4. monitor and measure the degree to which the RDIMS solution is meeting GoC business needs (e.g. performance of functionality and satisfaction levels)

5. select and transition to new functionality over time, as required

Status Report on RDIMS

1. *RDIMS successfully launched September 23, 2004*

2. *TBS/Program Branch released funds September 27, 2004*

   - *Late release necessitated reprofiling of $4M to future years*

3. *Two (2) BoD meetings convened plus workshop on IM Infrastructure (see BoD Status Report)*

4. *Negotiated draft MOUs with TBS/CIOB and LAC*

5. *Promoted RDIMS at GTEC*

   - *Exhibit and AgriDoc Presentation*
   - *RDIMS AgriDoc – GTEC Gold Medal Winner*

6. *RDIMS Project Team established September 7, 2004*

7. *RDIMS Team Planning Day – October 27, 2004 to:*

   - *Establish Operational Action Plan/set targets & desired outcomes*
   - *Engaged Regions in videoconference discussions*

8. *EIMSD Steering Committee convened November 1, 2004*

9. *Acquiring Critical Core Technical Resources – ongoing*
   - *Negotiated MOU with Agriculture & Agri-Food Canada*
   - *RFP for Business Case Analyst evaluated*
   - *RFP for Training closing November 23, 2004*

Report on RDIMS Board of Directors

1. *BoD transitioning from community driven RDIMS operation to a centrally funded shared service delivery operation which engages and seeks guidance from the RDIMS community through the BoD*

    - *Revised TORs under development*

2. *Overall endorsement in principle of RDIMS proposed 2004/2005 Business and Resourcing Strategy, including:*

    - *Confirmed and ranked priority business solutions for development*

3. *Ongoing consultations with respect to:*

    - *IM Infrastructure and Capacity Development Priorities*
    - *Identification of 5 BoD members at large on EISDM Steering Committee (3 from large and 2 from small departments and agencies)*

Next Steps

UPCOMING MILESTONES

1. Finalize IM infrastructure MOUs with TBS/CIOB and LAC

2. Refine Performance Measures, Client Satisfaction Indicators and Evaluation Methodologies

December 2004

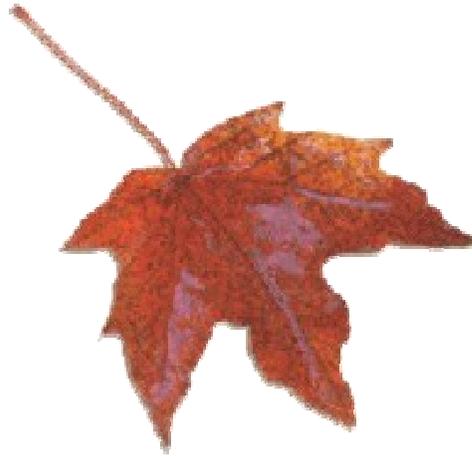*3. Implement targetted aggressive Communications & Marketing Strategy*

December 2004

4. Finalize RDIMS Training Program

December 2004

ENTERPRISE INFORMATION MANAGEMENT SOLUTIONS DELIVERY OFFICE

Background	RDIMS Products & Services	Business Operations	Organization & Governance	Next Steps	Decisions Required	23

- *Discussion*

THANK YOU!

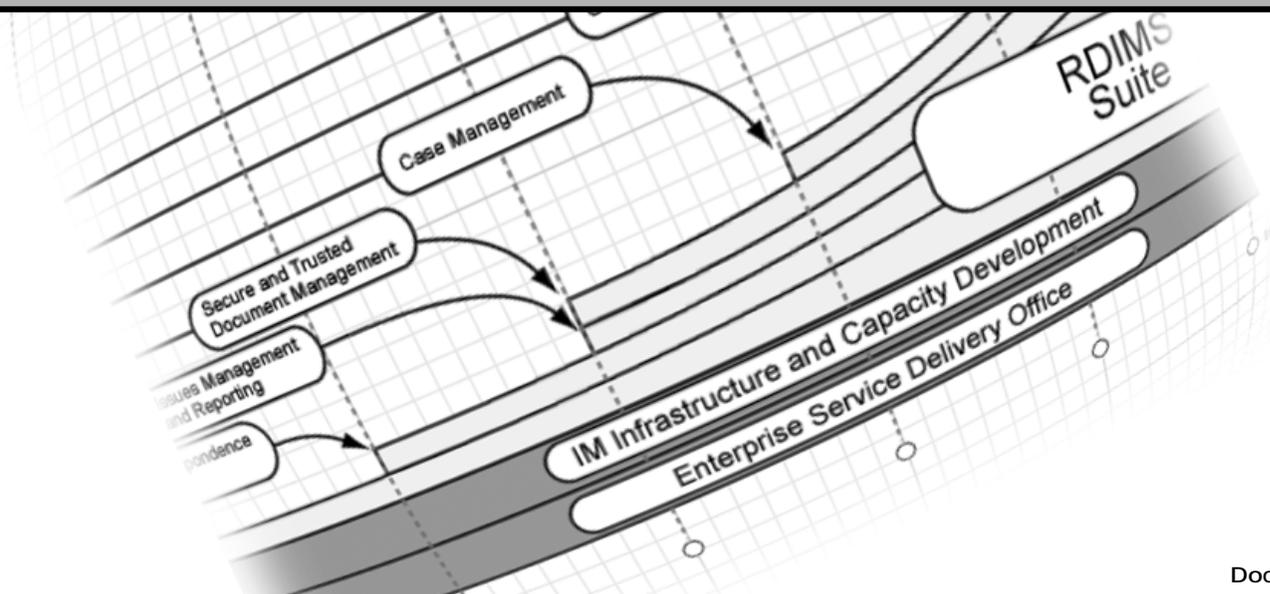# *Enterprise IM Solution Delivery Team*

RDIMS

Funding Proposal Evaluation Criteria

Barbara Wynne-Edwards, Executive Director EIMSDO

Doc.#193500

Public Works and Government Services Canada

Travaux publics et Services gouvernementaux Canada

Canada

RDIMS – Presentation MGI Senior Officials

A. *Initial Qualification Criteria - Statement of Purpose and Context:*

1. *Purpose of proposed initiative and rationale for consideration as a GoC enterprise application or infrastructure component;*

2. *Can be positioned within one or more category of proposals – see listing in C. below;*

3. *Evidence of tangible and sustainable contribution to RDIMS enterprise implementation;*

4. *Recognition of and alignment with, other related initiatives;*

5. *Identification of matching/alternative funding sources; and, appropriate executive sponsorship.*

B. General Qualification Criteria:

1. Clear statement of the proposed initiative(s):

- *Overall objective(s) to be achieved, including identification of definitive link to RDIMS enterprise implementation;*
- *Savings and/or efficiencies to be achieved through streamlining of processes and/or enterprise application.*

2. **Robust project management framework with clearly defined deliverables and project team accountabilities, including:**

- *Milestones, timeframes and resources requirements related to deliverables;*
- *Funding release strategy based upon milestones and deliverables; and*
- *Risk identification and mitigation strategies*

C. Additional Specific Criteria:

1. Business Solution Development Proposals:

- *Proposes a business solution which has been identified in the RDIMS Implementation Strategy as having recognized potential for enterprise application;*
- *Prototype site organization which is recognized as a leader in the community of interest; urgent operational requirement for the specific business solution bieng proposed;*
- *Solution/result will be transferable/reusable in other departments with no or minimal additional investment;*
- *Technical, organizational, and resource environment conducive to a successful implementation.*

C. Additional Specific Criteria (cont'd):

2. IM Infrastructure Proposals

- adheres to the GoC MGI policy, and is related to one or more of the following: framework, architecture, standards and guidelines;
- includes rationale for priorizing deliverables to facilitate the timely implementation of RDIMS.

3. IM Capacity Development Proposals

- addresses priority requirements such as:
  - core competencies of Records Administrators
  - functional classification capacity