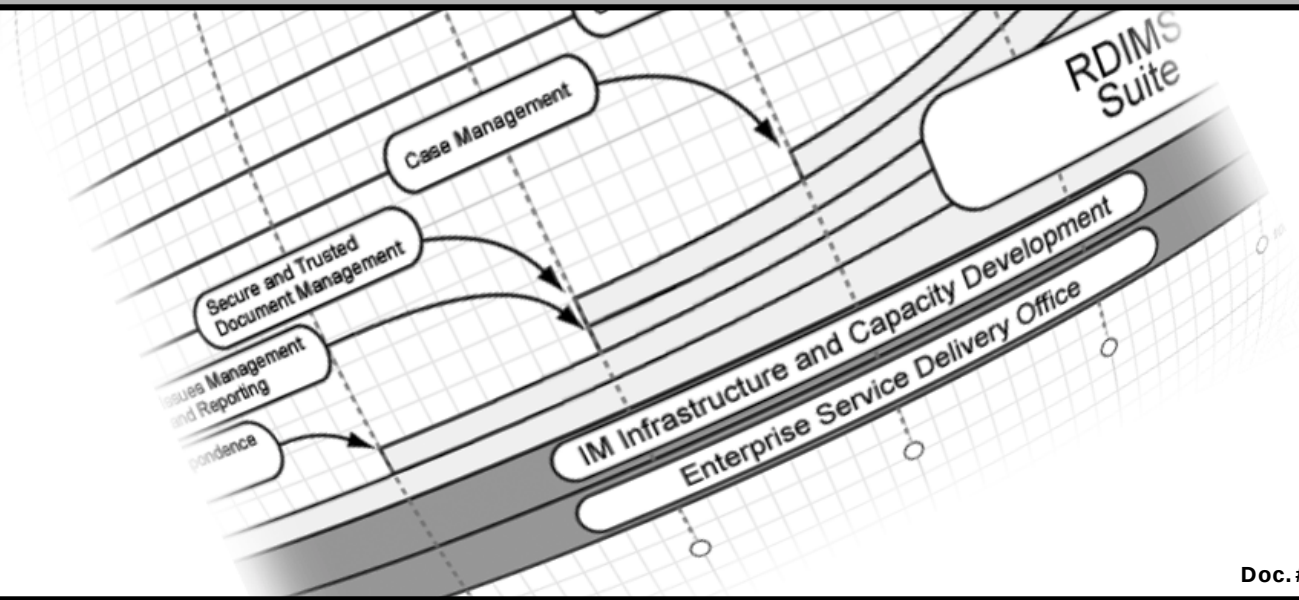
Official Launch

RDIMS Enterprise Shared Service Delivery

IM Day 2004 Presentation

Barbara Wynne-Edwards / Conan Hunter

September 23 2004



Doc.#194582

AGENDA

Objectives:

1. *Official launch of RDIMS as the first enterprise shared services product of ITSB;*
2. *Present the RDIMS products and services offerings, governance and service delivery organization;*
3. *Begin the RDIMS dialogue and engagement of the broader GoC IM community*

AGENDA

Table of Contents:

1. *Background*
2. *RDIMS Products and Services*
3. *Business Operations*
4. *EIMSDO 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.

Service Visions for Canadians, Business, and International channels:

"Information, Content Management (across all service delivery channels), and the development of a rigorous metadata regime for IM/KM across jurisdictions" identified by all three Service Visions as the primary shared solution enablers."

Shared Solutions Working Group Final Report, July 2004
Michael Turner, Assistant Deputy Minister, ITSB/PWGSC

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 ✓ Mandate ✓ Funding ✓

Background

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*

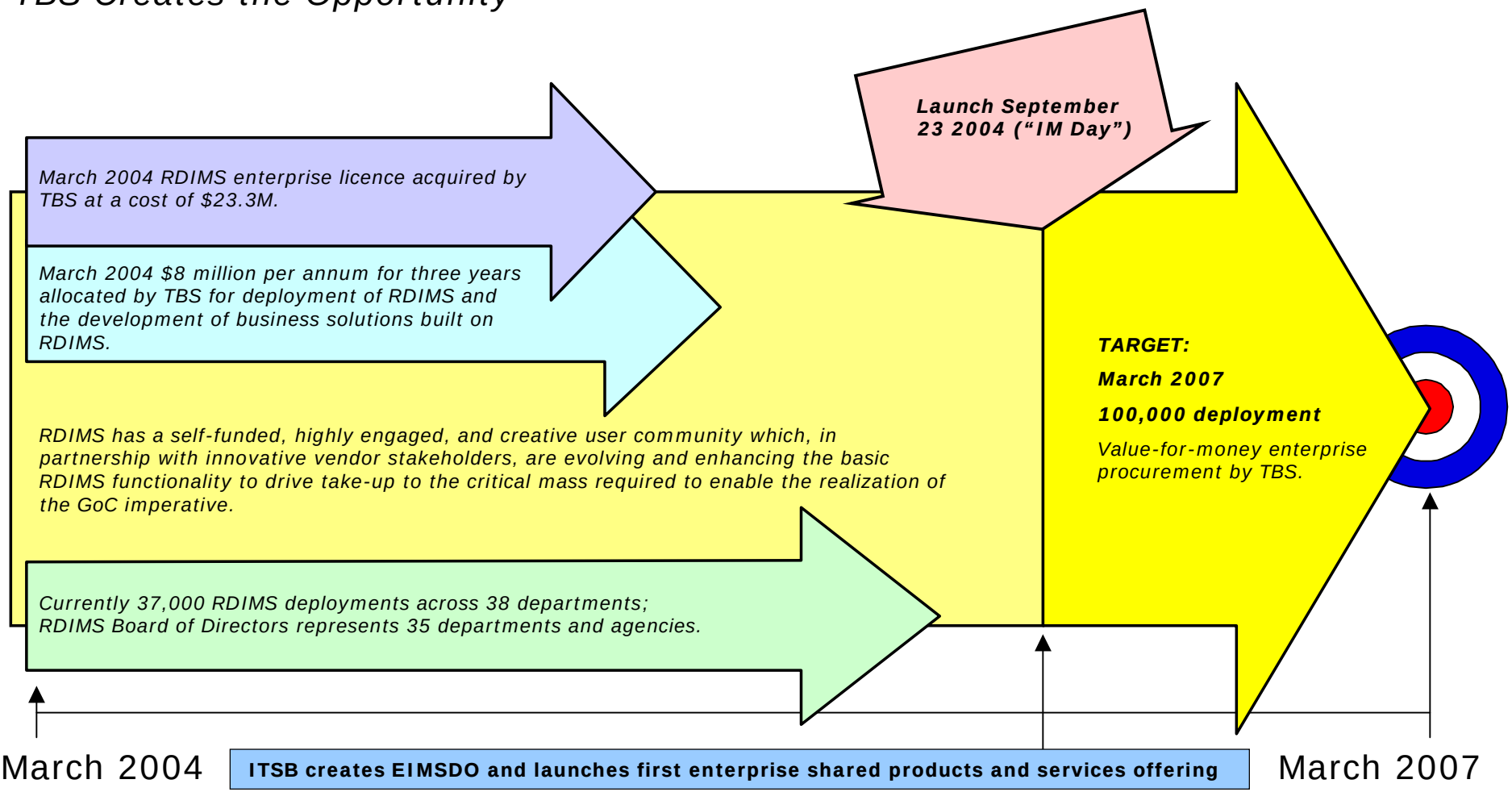
Functions of a central service delivery arm:

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*

Background

RDIMS STATUS

TBS Creates the Opportunity



Background

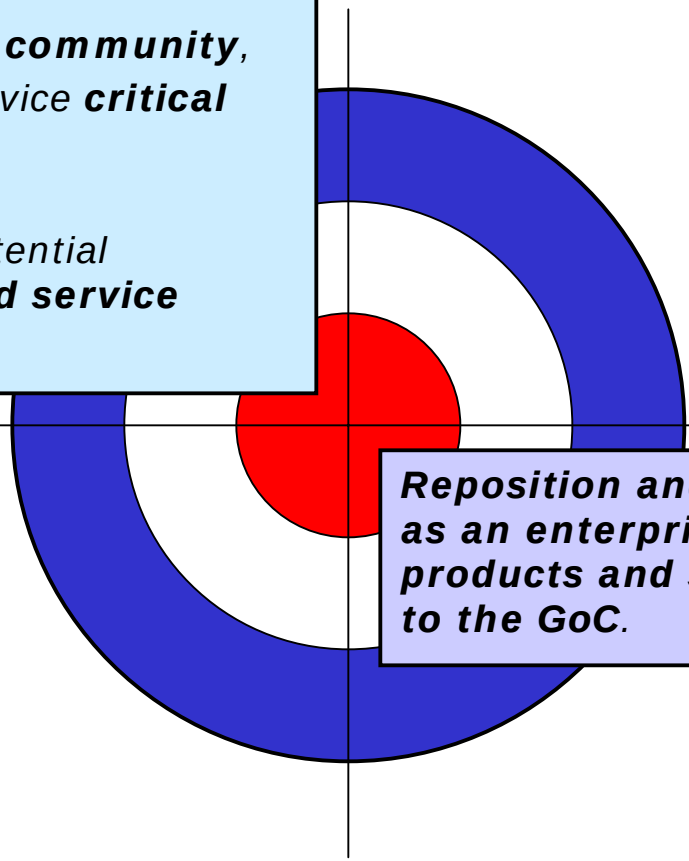
ITSB OPPORTUNITY

***To deliver RDIMS**:*

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

***which represents**:*

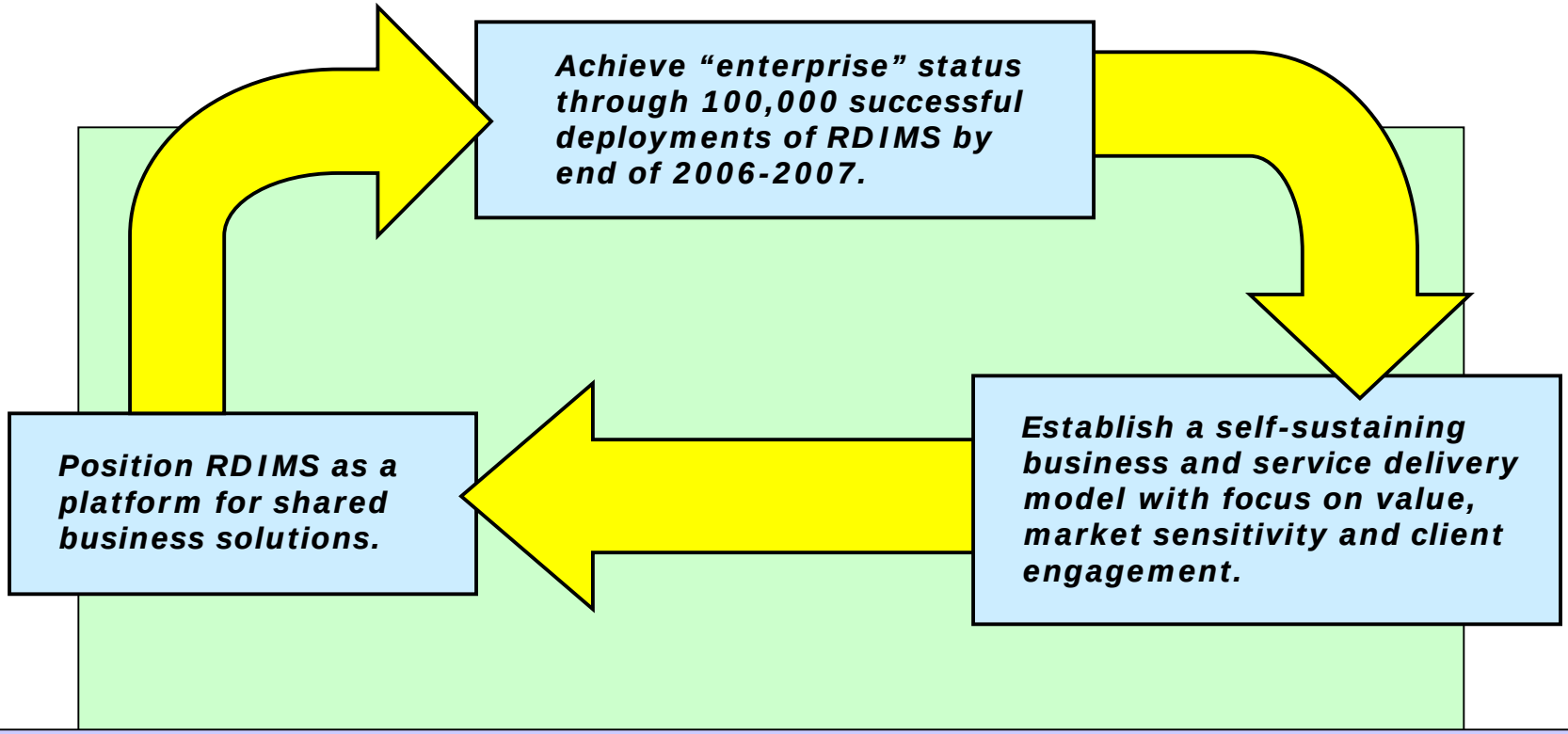
- *a **low-risk/high-payoff** potential opportunity as a **first shared service offering** from ITSB.*



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

Background

ITSB OBJECTIVES



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 Project Office Release Management
			Marcom	
		Client engagement	*Product promotion*	
		Community development		
	Management Consulting	*Maintain repository of re-usable elements*		
		Develop training packages		
	Deployment Strategies	*Architecture development*		
		Configuration service		
	Licence Management	*Contract negotiation and administration*		
		Software and documentation designation		
		Core problem resolution and release management		
EIMSDO RDIMS business solution development functions	*Community Leadership*	*Business solution productization*		*Manager – Configuration* *Manager - Architecture* *Manager – Requirements* *Manager – Mapping* *Technical Analyst* *Functional Analyst* *Programmers* *As required resources:* *Procurement Manager* *Records Specialists* *Functional Analysts* *Quality Assurance* *Integration Development* *Security Analys* *Network Archite* *Training Develo* *Change Mgt./Pe* *Vendor resources*
	Management Consulting	*Requirements definition and prototype development*		
		Prototype project management		
		Analytical support and technical expertise		
	Deployment Strategies	*Design architecture*		
		Develop integration		
		Configure business solutions		
		Solution implementation services		
		Release management of business solutions		

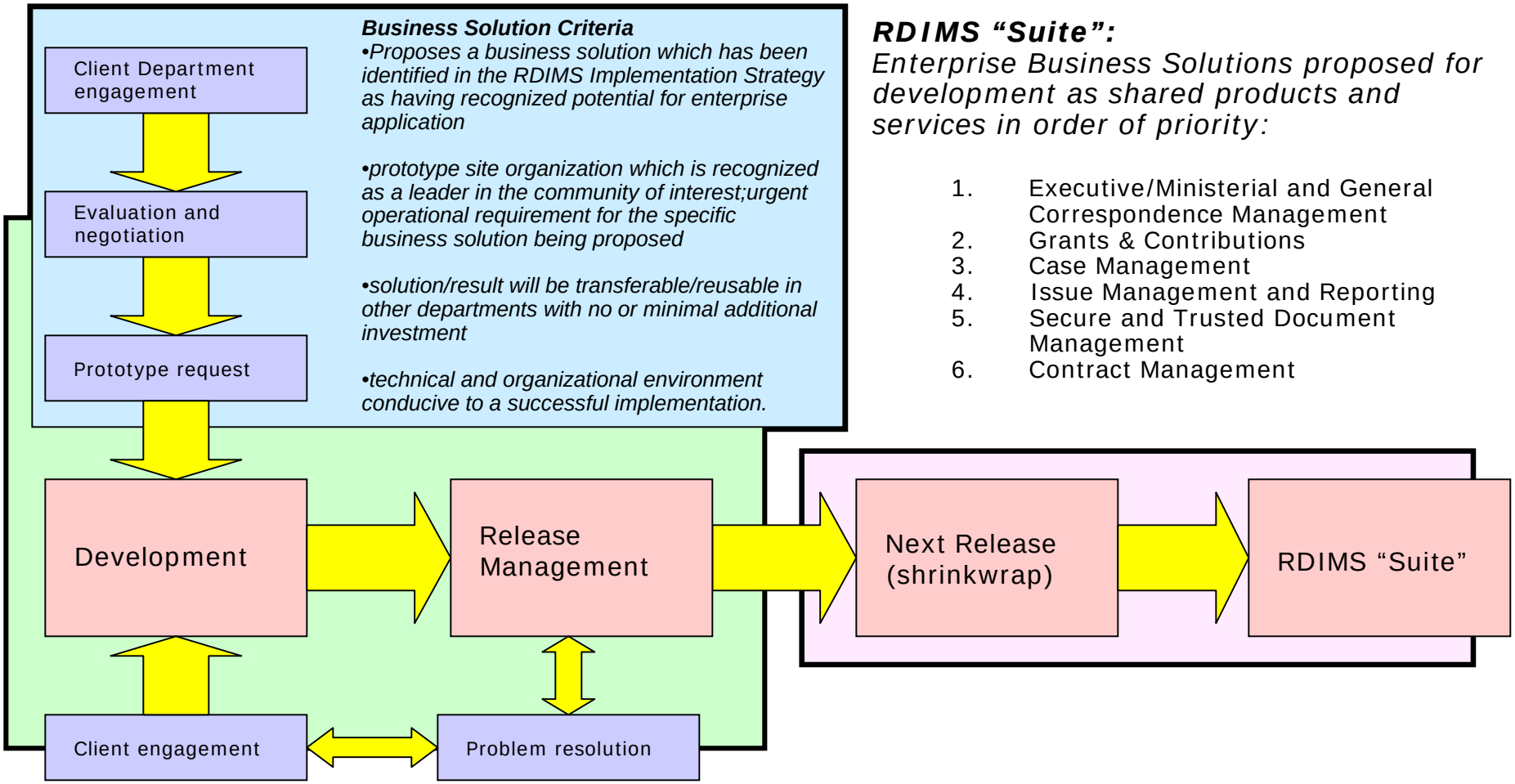
$700k/FY

$500k-1.5M/solution

RDIMS Products and Services

PROTOTYPE DEVELOPMENT PROCESS

RDIMS is a platform for developing new shared business solutions



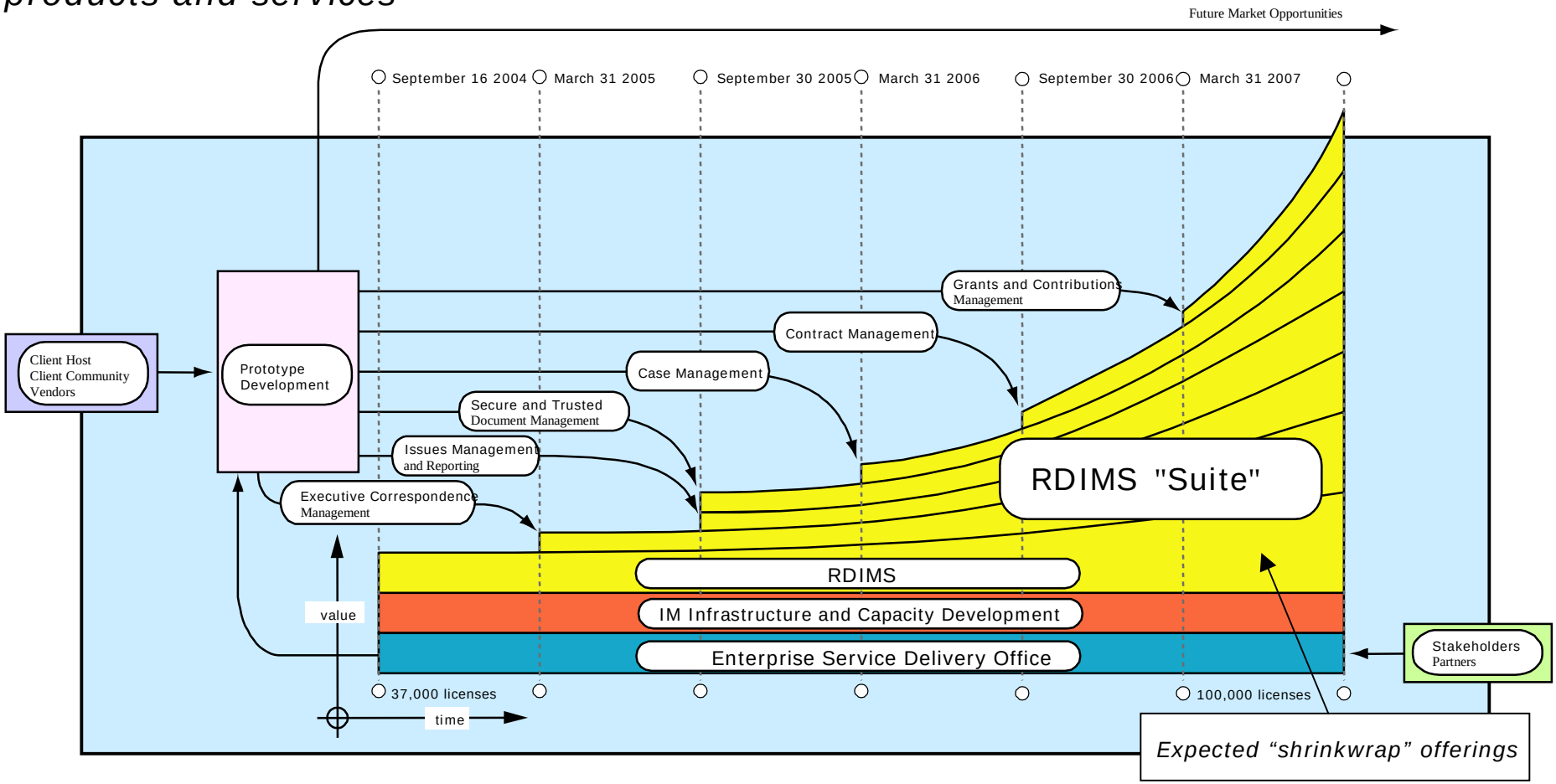
RDIMS "Suite":
Enterprise Business Solutions proposed for development as shared products and services in order of priority:

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

RDIMS Products and Services

POTENTIAL GROWTH STRATEGY

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



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

FUNDING PROPOSAL EVALUATION CRITERIA

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

FUNDING PROPOSAL EVALUATION CRITERIA

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.*

RDIMS Business Operations

FUNDING PROPOSAL EVALUATION CRITERIA

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*

RDIMS Business Operations

FUNDING PROPOSAL EVALUATION CRITERIA

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.*

RDIMS Business Operations

FUNDING PROPOSAL EVALUATION CRITERIA

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*

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.

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

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

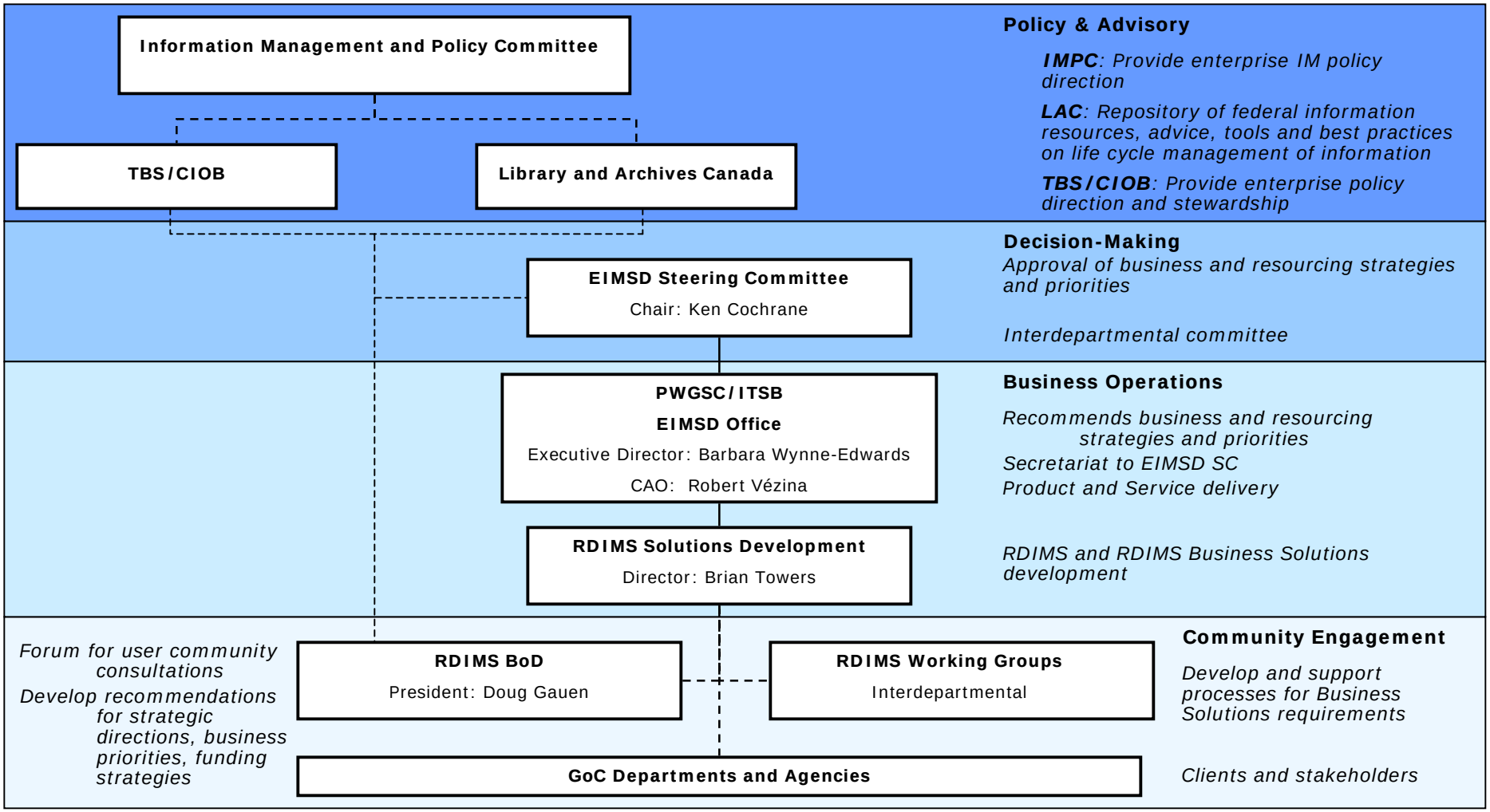
RDIMS Business Operations

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



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, Brian Towers, Helen Jelich (CMS Representative)*

***RDIMS Board of Directors:** President, Doug Gauen*

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

- *PWGSC proposes Maurice Chénier (as CIO)*

Next Steps

UPCOMING MILESTONES

1. ***RDIMS / EIMSDO Official Launch***

   September 23 2004

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

   September 30 2004

3. ***Develop aggressive Communications & Marketing Strategy***

   - ***Release Communiqué to initialize EIMSDO/RDIMS Products and Services awareness***

   September 30 2004

4. ***Develop RDIMS Training Program***

   September 30 2004

Discussion

TOPICS

- *Questions and Clarifications*

THANK YOU!

Enterprise IM Solution Delivery Team