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USDA-APHIS

IICA INFORMATION SYSTEMS PLANNING WORKSHOP

MARCH 1995

SAN JOSE COSTA RICA

BV-008997
IICA
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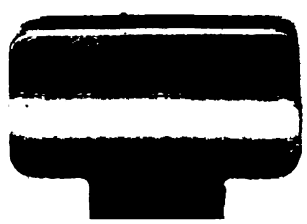
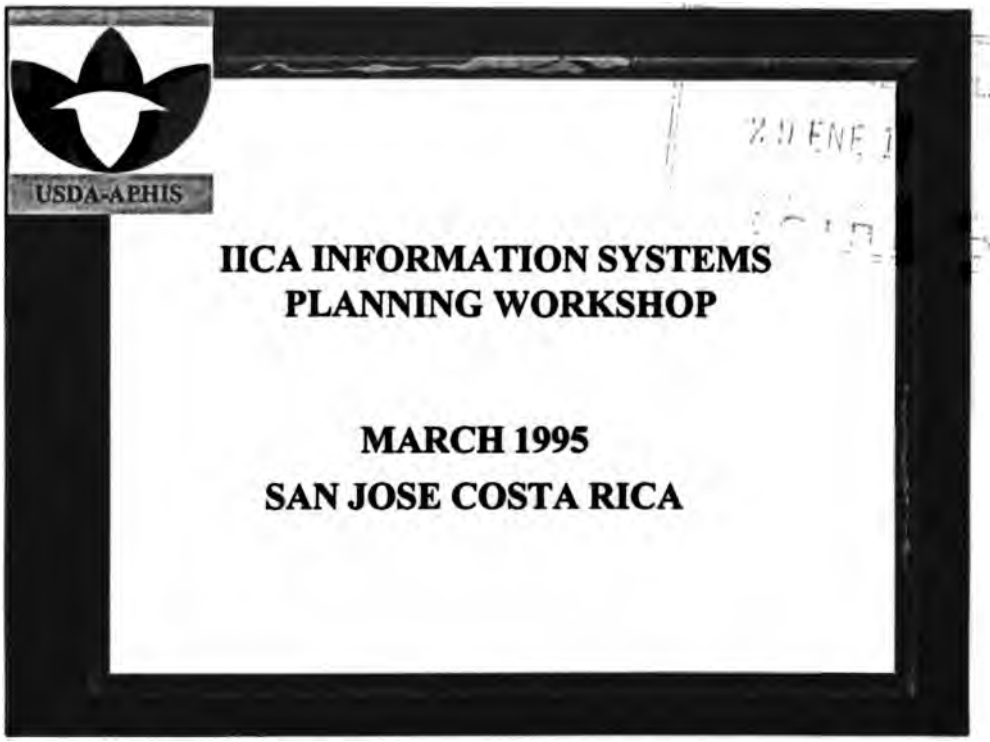
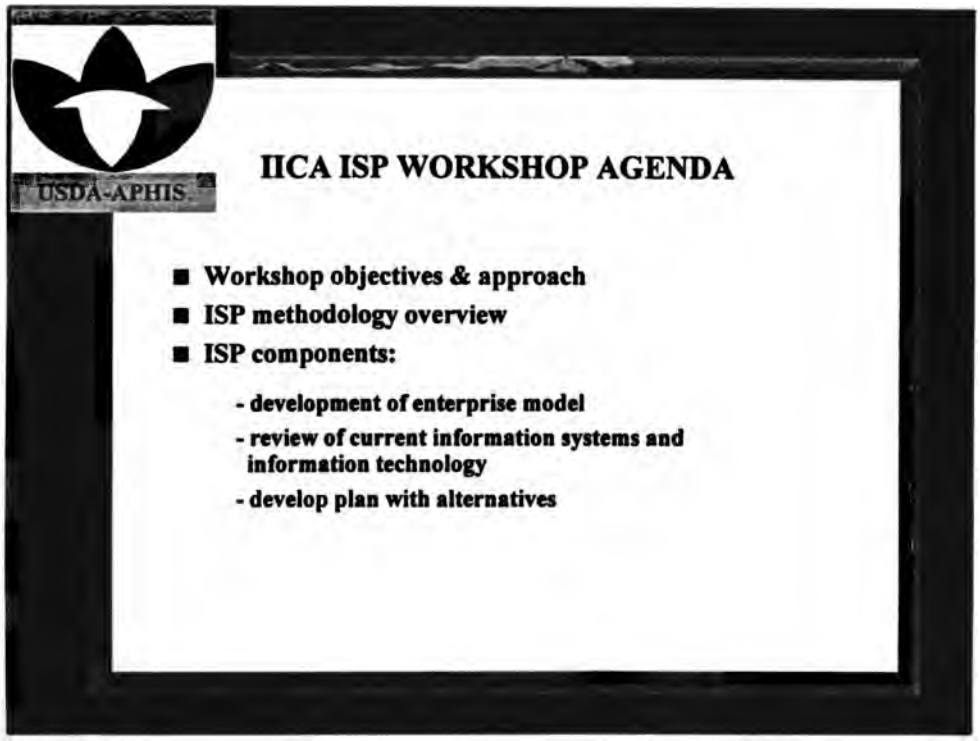
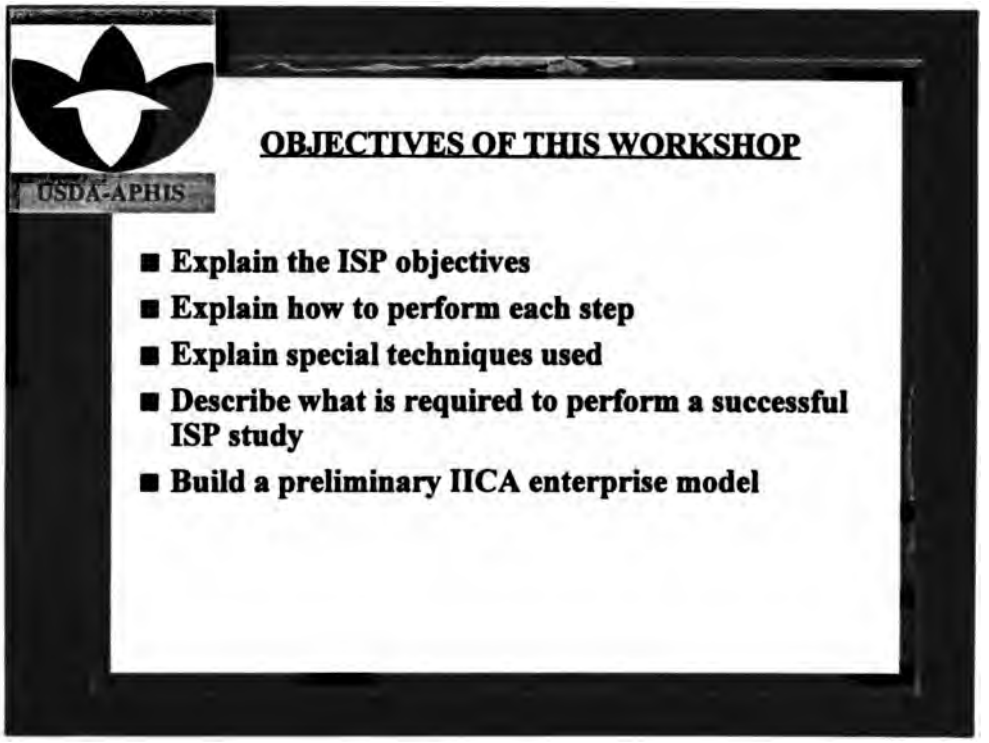



USDA-APHIS
IICA INFORMATION SYSTEMS
PLANNING WORKSHOP
MARCH 1995
SAN JOSE COSTA RICA


USDA-APHIS
IICA ISP WORKSHOP AGENDA
Workshop objectives & approach
ISP methodology overview
ISP components:
- development of enterprise model
- review of current information systems and information technology
- develop plan with alternatives

Notes:

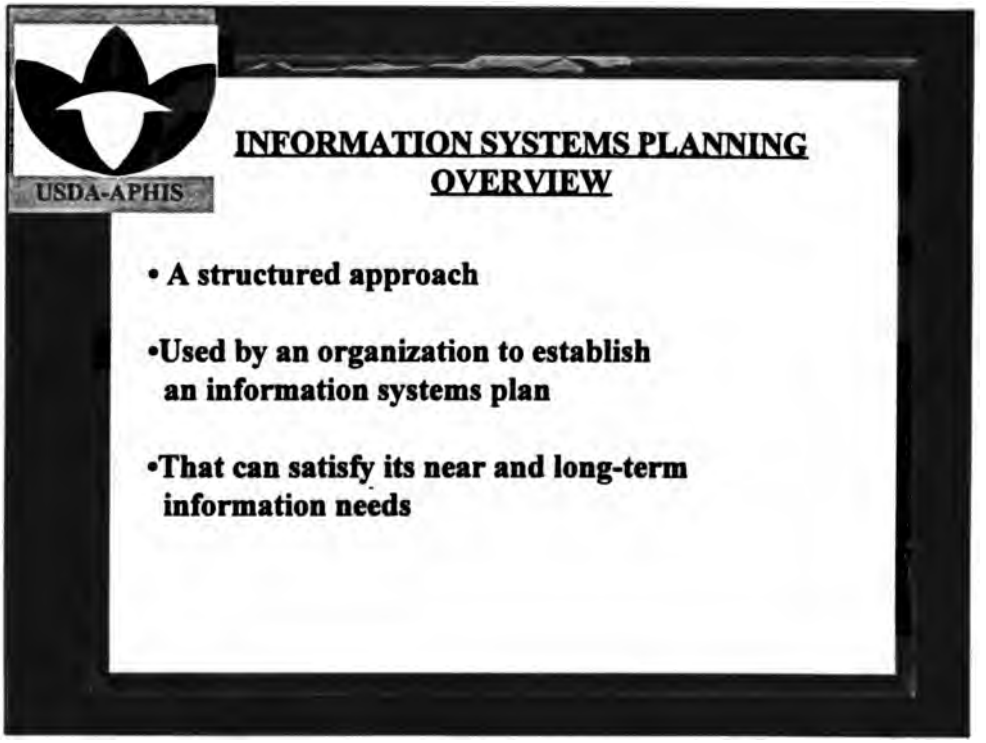

USDA-APHIS
OBJECTIVES OF THIS WORKSHOP
■ Explain the ISP objectives
■ Explain how to perform each step
■ Explain special techniques used
■ Describe what is required to perform a successful ISP study
■ Build a preliminary IICA enterprise model

Notes:

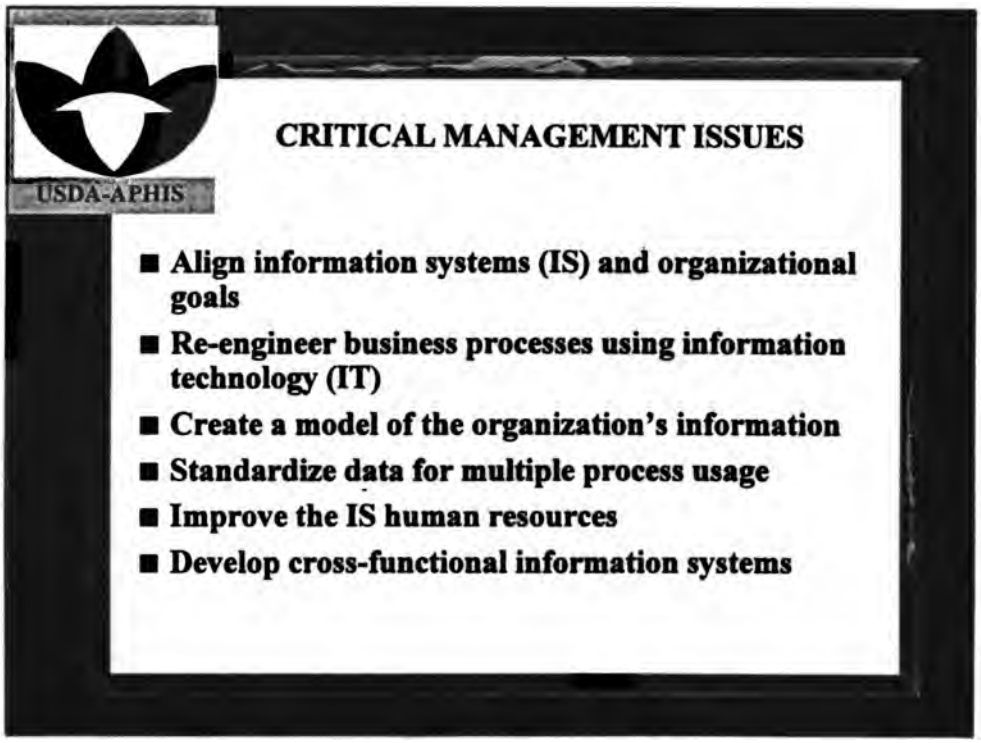
USDA-APHIS
WORKSHOP APPROACH
■ Workshop team will use their own enterprise
■ Enables team to learn methodology by doing
■ Start to build the basic study products
■ Provides experience to the team
■ Builds spirit of unity and collaboration

Notes:

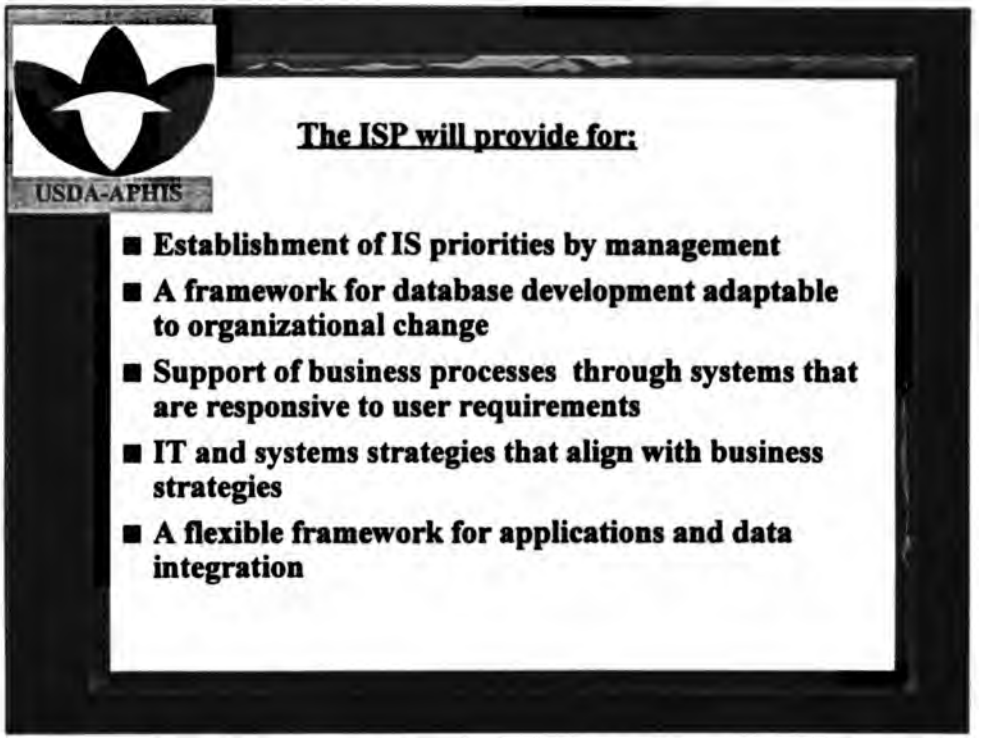
Notes:


USDA-APHIS
INFORMATION SYSTEMS PLANNING
OVERVIEW
• A structured approach
•Used by an organization to establish an information systems plan
•That can satisfy its near and long-term information needs

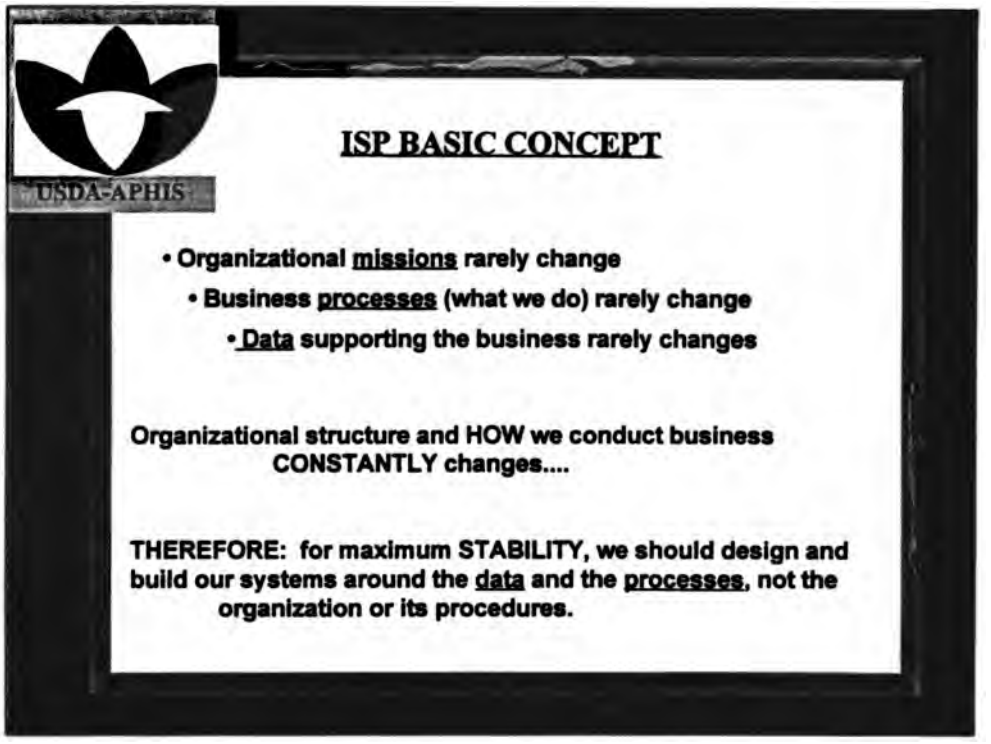
Notes:


USDA-APHIS
CRITICAL MANAGEMENT ISSUES
■ Align information systems (IS) and organizational goals
■ Re-engineer business processes using information technology (IT)
■ Create a model of the organization's information
■ Standardize data for multiple process usage
■ Improve the IS human resources
■ Develop cross-functional information systems

Notes:


USDA-APHIS
The ISP will provide for:
■ Establishment of IS priorities by management
■ A framework for database development adaptable to organizational change
■ Support of business processes through systems that are responsive to user requirements
■ IT and systems strategies that align with business strategies
■ A flexible framework for applications and data integration

Notes:


USDA-APHIS
ISP BASIC CONCEPT
• Organizational missions rarely change
• Business processes (what we do) rarely change
• Data supporting the business rarely changes
Organizational structure and HOW we conduct business CONSTANTLY changes....
THEREFORE: for maximum STABILITY, we should design and build our systems around the data and the processes, not the organization or its procedures.

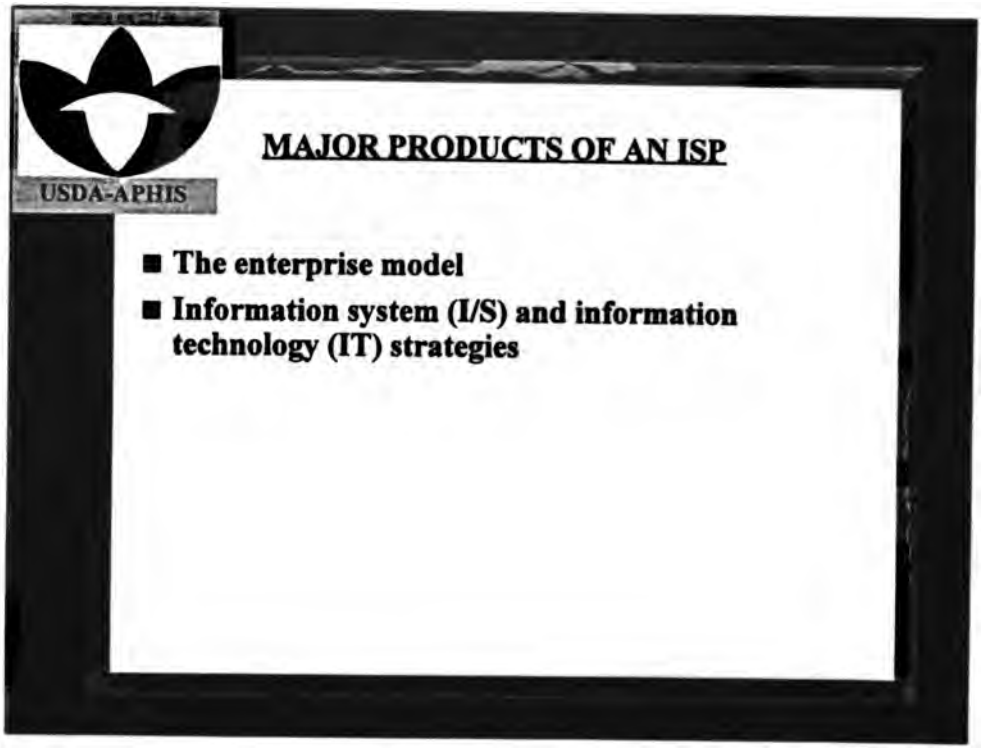
Notes:

USDA-APHIS
ISP BASIC PRINCIPLES
• Obtain executive commitment and involvement
• Understand the business from a management perspective
• Planning is performed by the organization, for the organization
• Adopt a top-down approach to studying the business, and
• A bottom-up approach to implementation
• Create a plan that is dynamic and evolutionary
• Implement information management functions

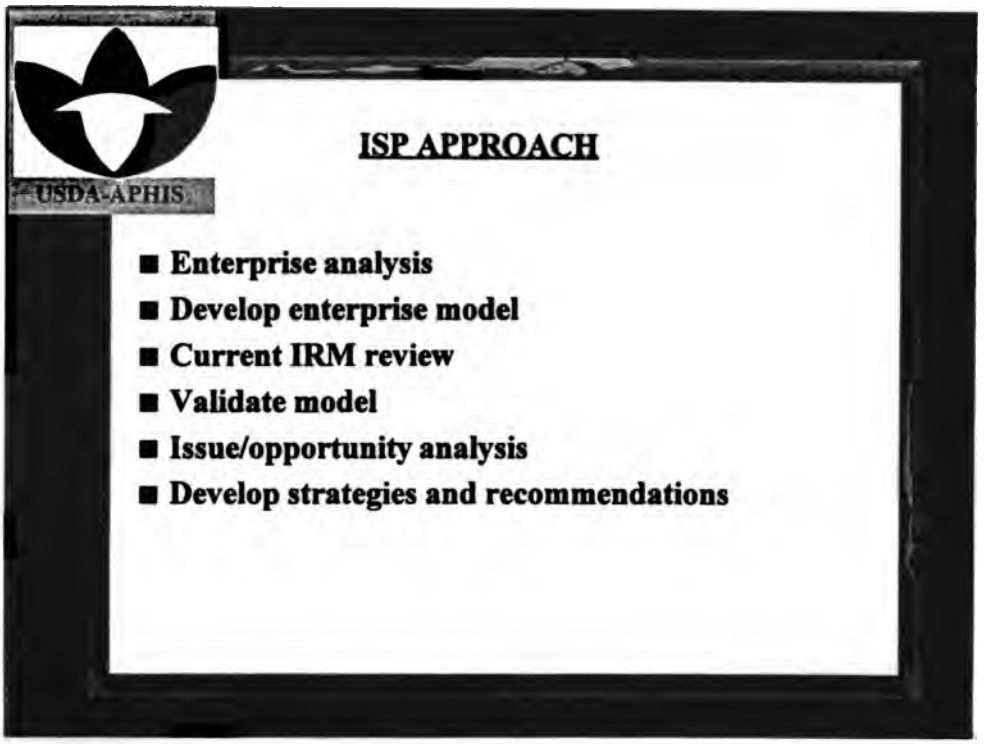
Notes:

USDA-APHIS
ISP PARTICIPANTS
Executive sponsor
Steering committee
Team leader
Team members
Enterprise members and staff (interviewees)
Facilitator
Customers

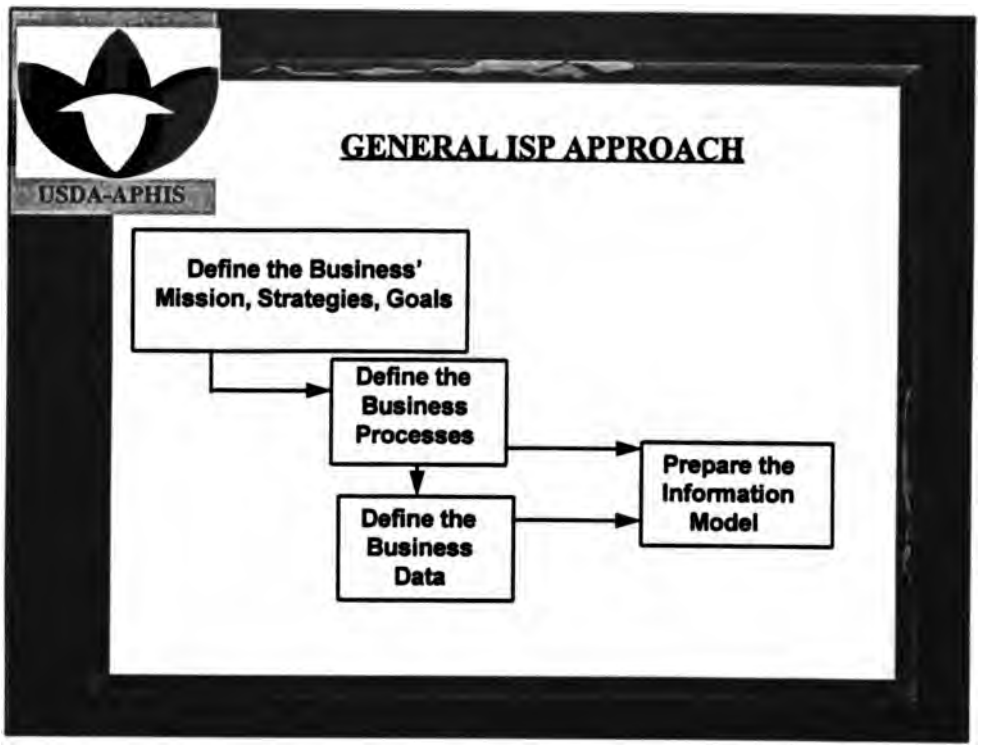
Notes:


USDA-APHIS
MAJOR PRODUCTS OF AN ISP
The enterprise model
Information system (I/S) and information technology (IT) strategies

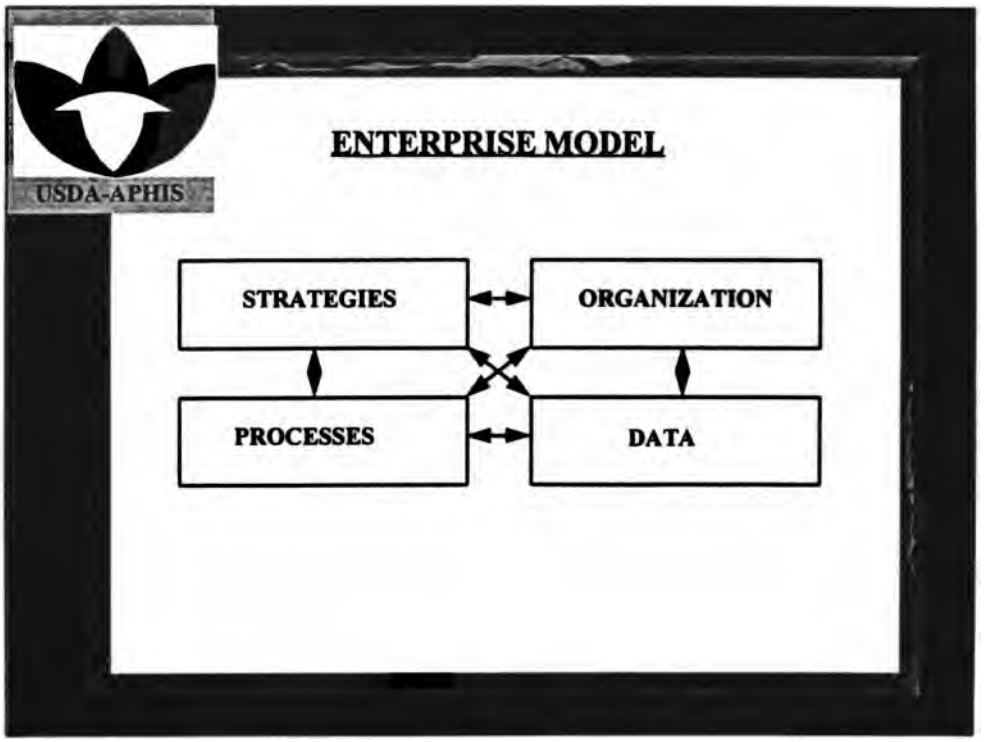
Notes:


USDA-APHIS
ISP APPROACH
Enterprise analysis
Develop enterprise model
Current IRM review
Validate model
Issue/opportunity analysis
Develop strategies and recommendations

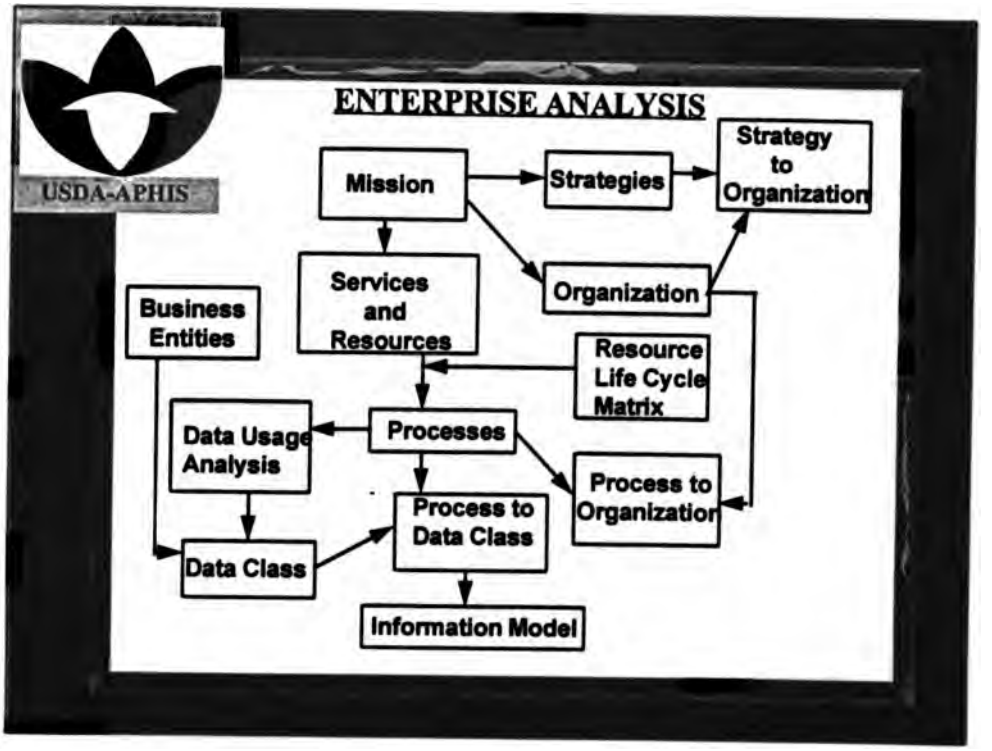
Notes:


USDA-APHIS
GENERAL ISP APPROACH
Define the Business' Mission, Strategies, Goals
Define the Business Processes
Define the Business Data
Prepare the Information Model

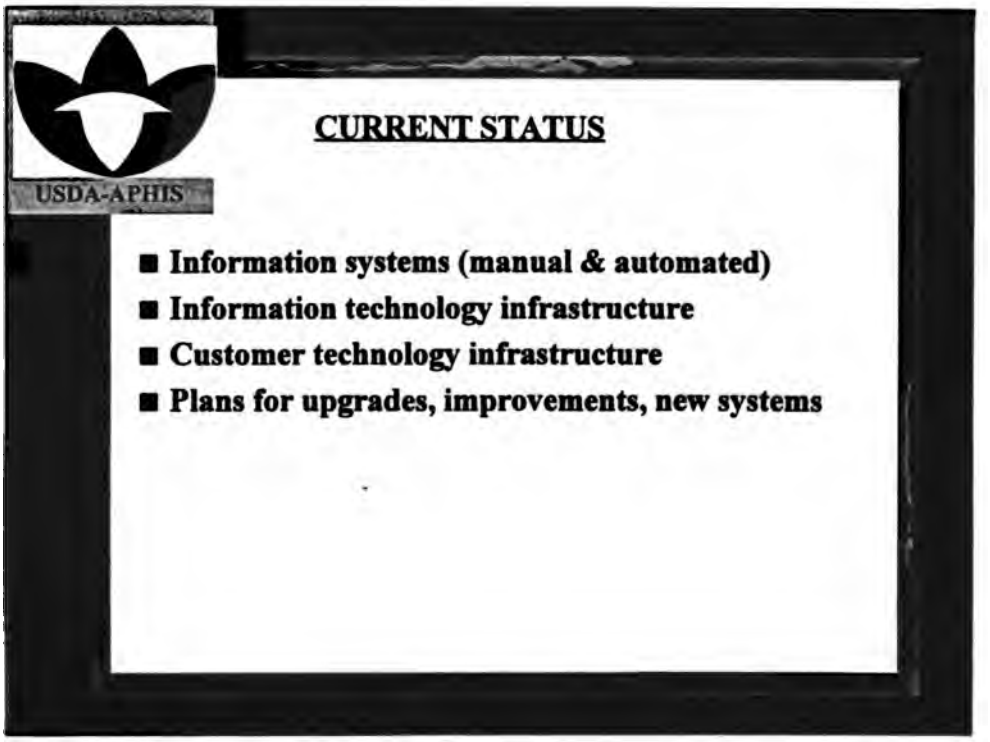
Notes:


USDA-APHIS
ENTERPRISE MODEL
STRATEGIES
ORGANIZATION
PROCESSES
DATA

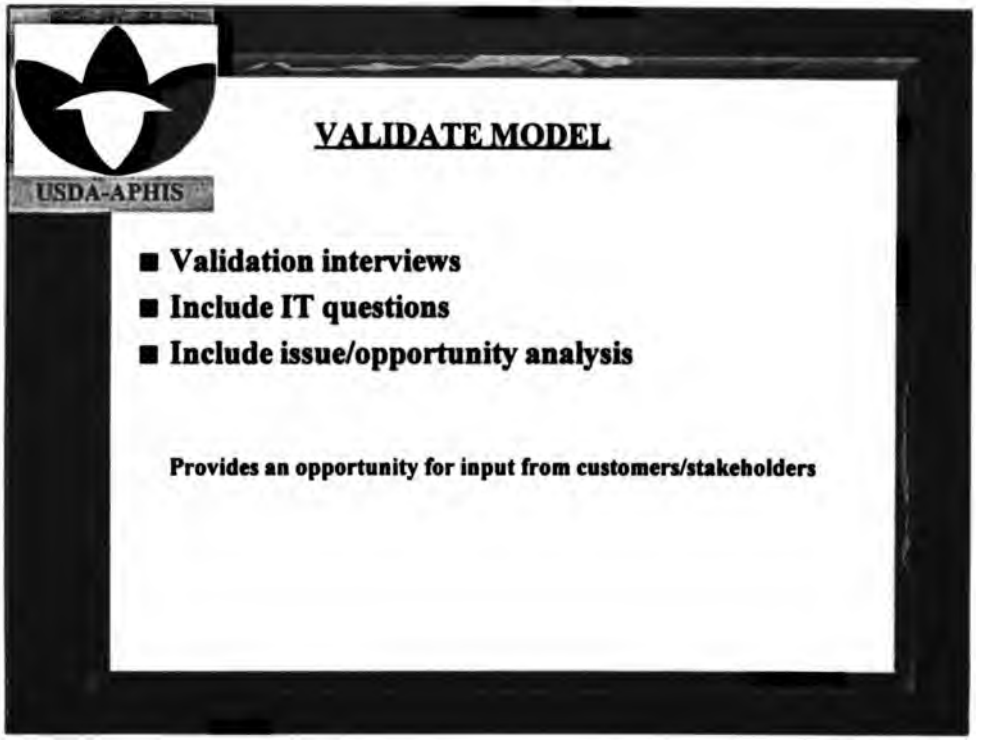
Notes:


USDA-APHIS
ENTERPRISE ANALYSIS
Mission
Strategies
Strategy to Organization
Services and Resources
Organization
Business Entities
Resource Life Cycle Matrix
Data Usage Analysis
Processes
Process to Organization
Process to Data Class
Data Class
Information Model

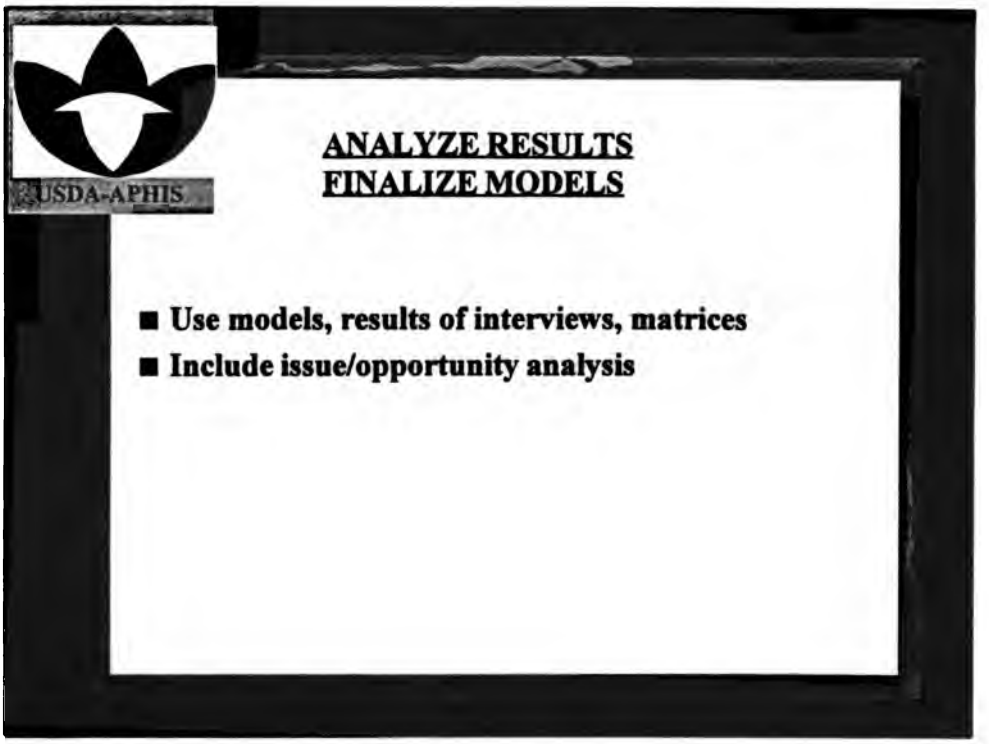
Notes:


USDA-APHIS
CURRENT STATUS
Information systems (manual & automated)
Information technology infrastructure
Customer technology infrastructure
Plans for upgrades, improvements, new systems

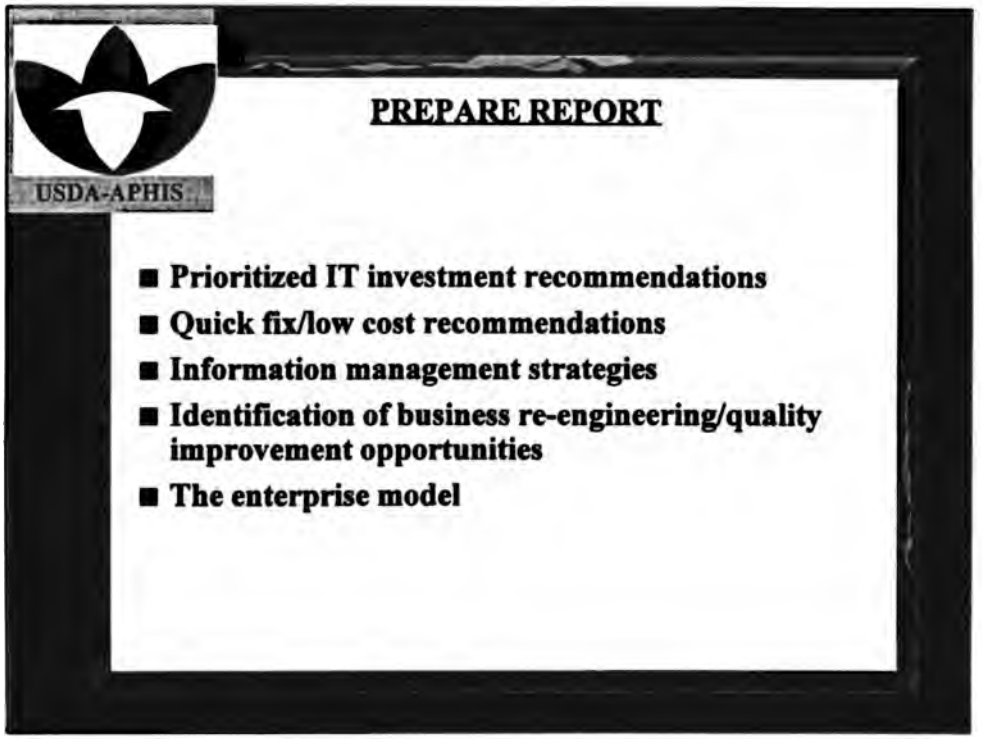
Notes:


USDA-APHIS
VALIDATE MODEL
■ Validation interviews
■ Include IT questions
■ Include issue/opportunity analysis
Provides an opportunity for input from customers/stakeholders

Notes:

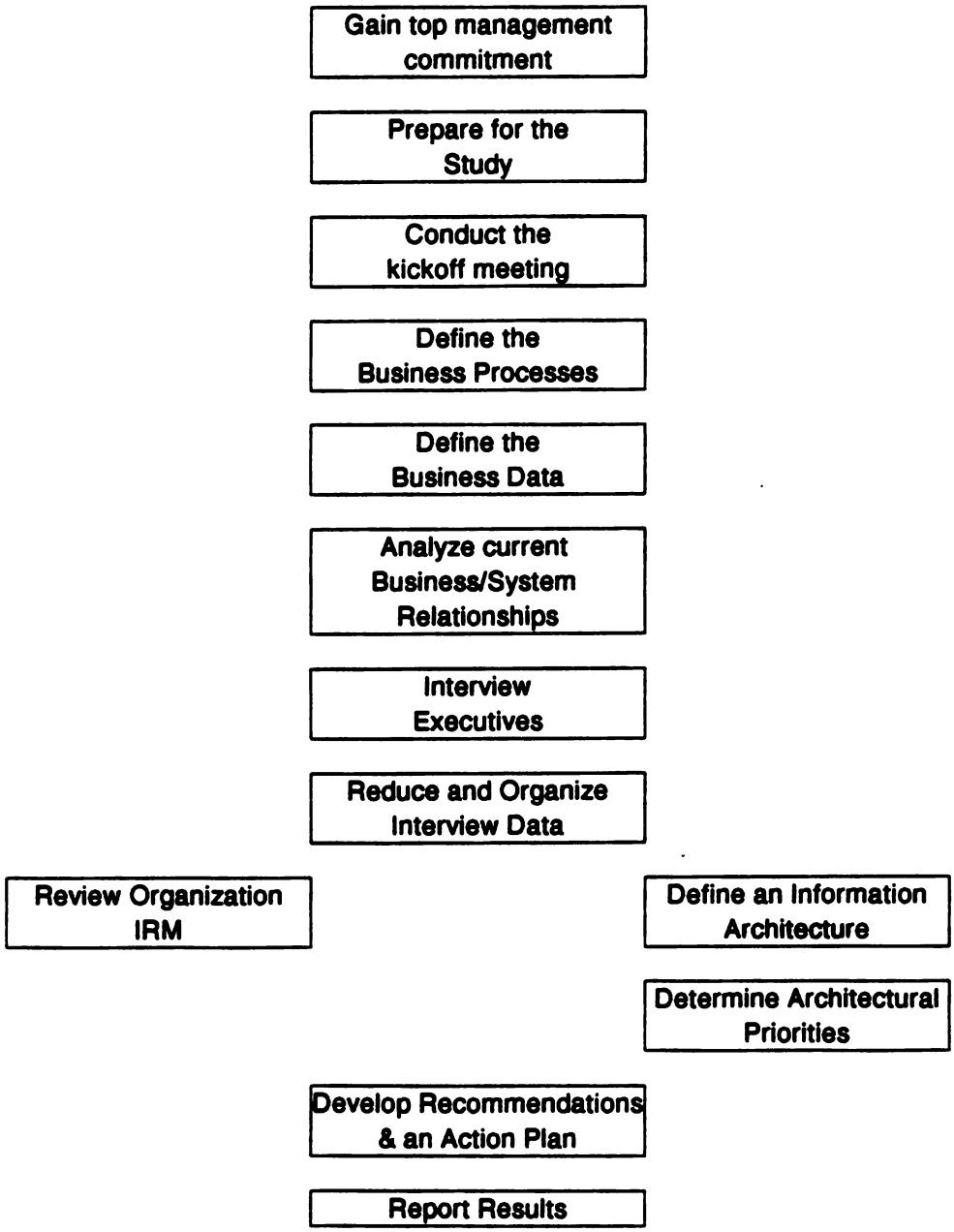

USDA-APHIS
ANALYZE RESULTS
FINALIZE MODELS
■ Use models, results of interviews, matrices
■ Include issue/opportunity analysis

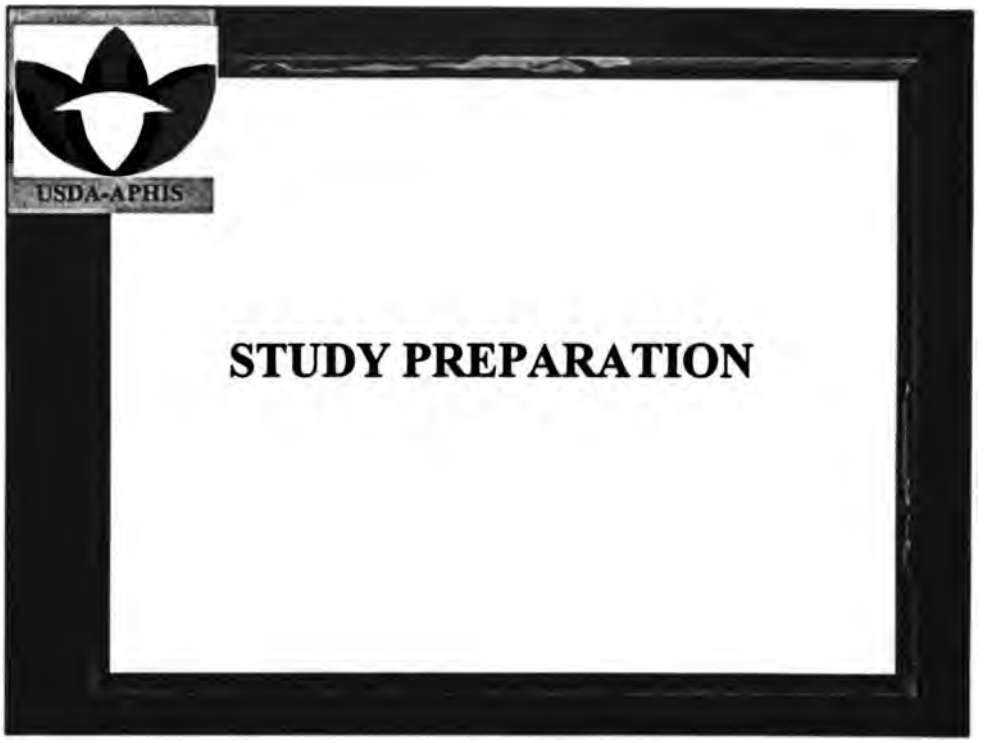
Notes:


USDA-APHIS
PREPARE REPORT
Prioritized IT investment recommendations
Quick fix/low cost recommendations
Information management strategies
Identification of business re-engineering/quality improvement opportunities
The enterprise model

Notes:

TRADITIONAL
STEPS IN PERFORMING AN ISP





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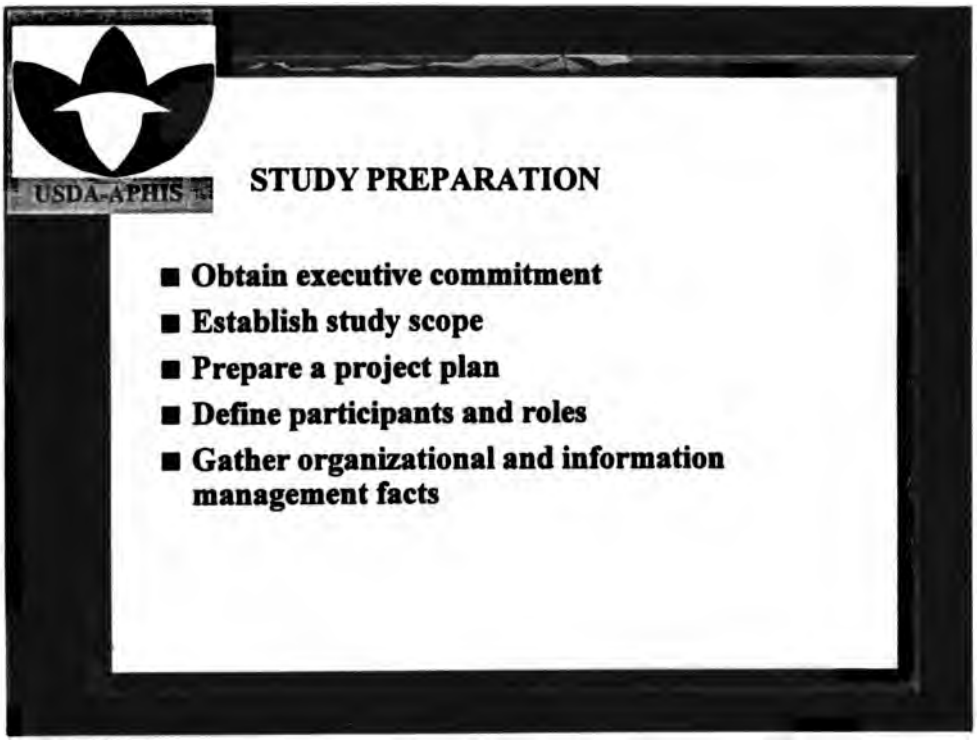
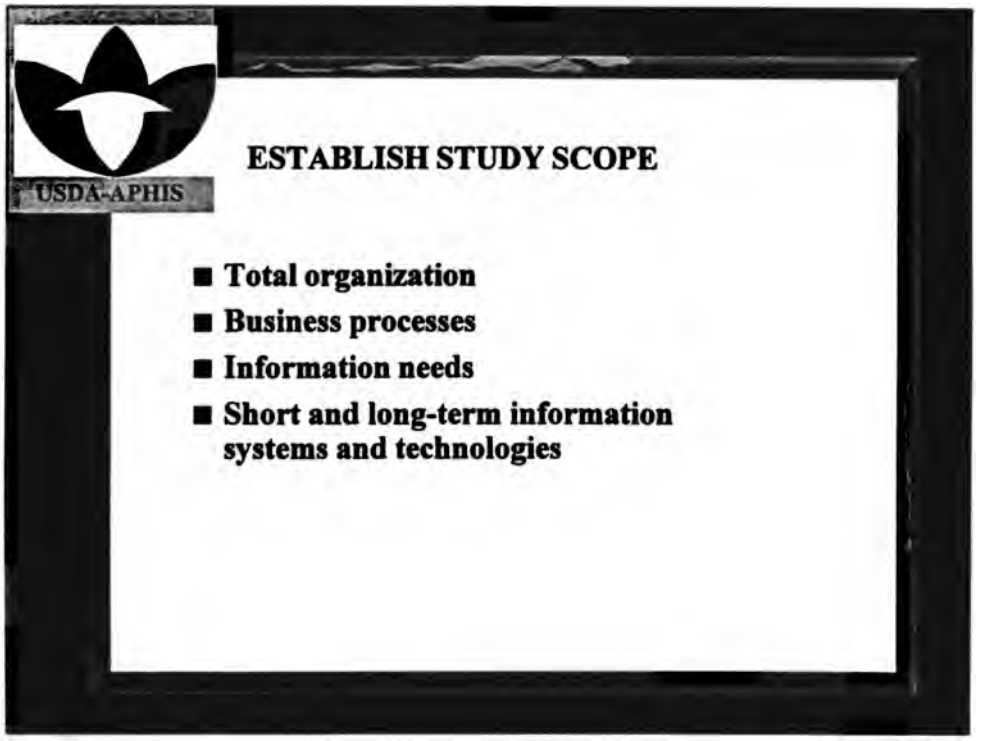

USDA-APHIS
STUDY PREPARATION
Obtain executive commitment
Establish study scope
Prepare a project plan
Define participants and roles
Gather organizational and information management facts

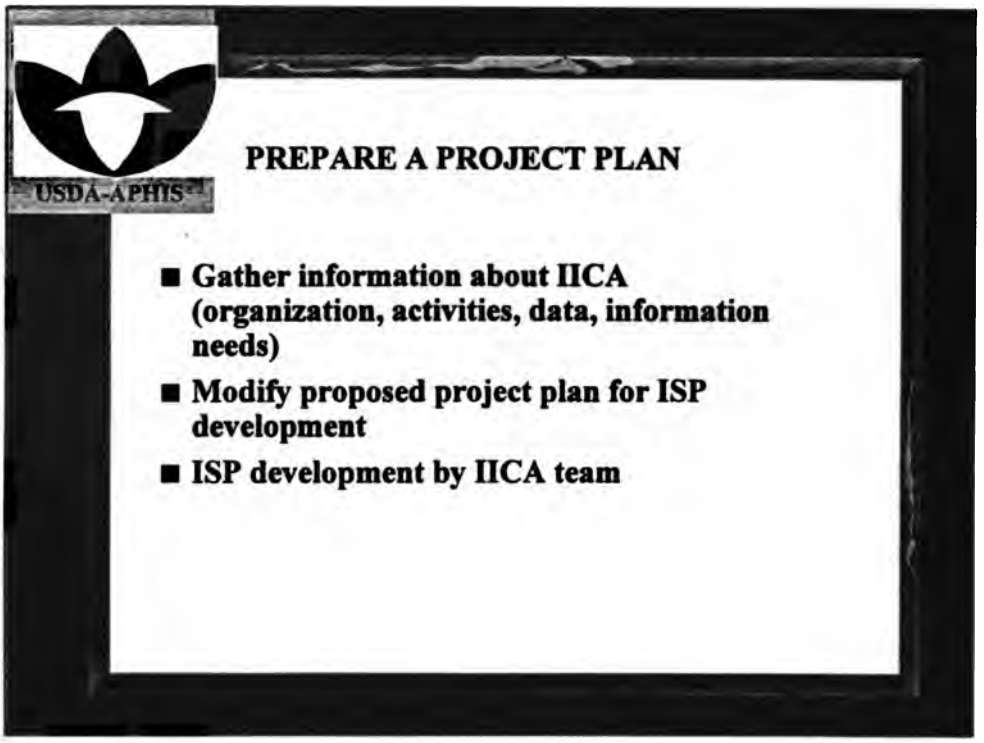
Notes:

USDA-APHIS
OBTAIN EXECUTIVE COMMITMENT
■ IICA Medium Term Plan requires the gathering, generation and maintenance of information on Agriculture and Trade for member Countries
■ Approval by IICA Director General

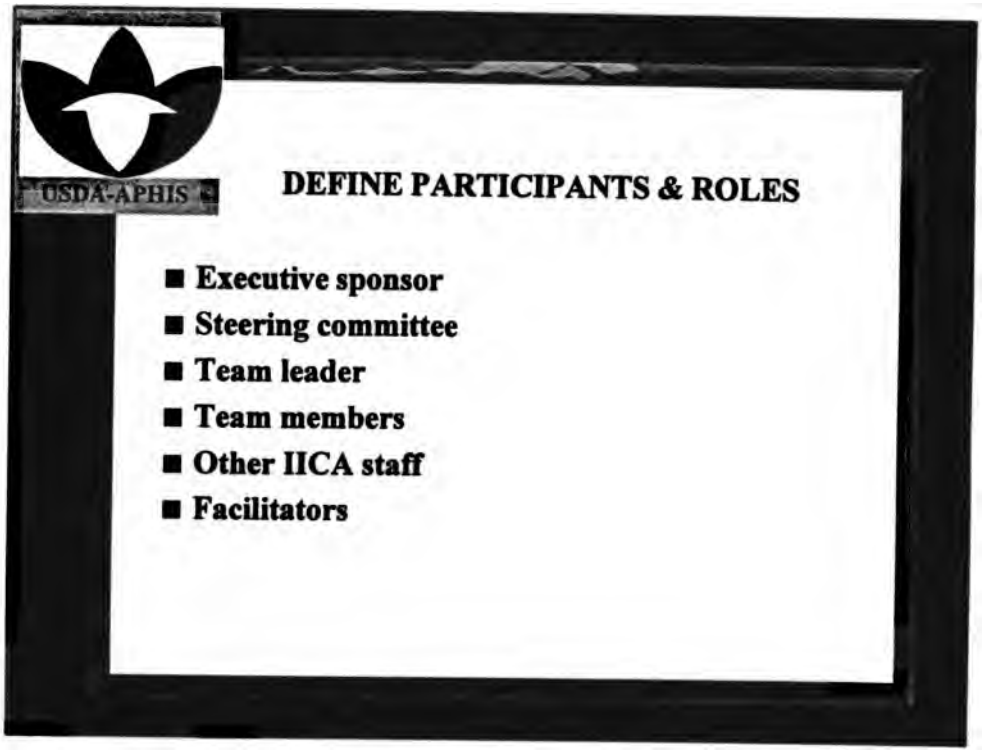
Notes:


USDA-APHIS
ESTABLISH STUDY SCOPE
Total organization
Business processes
Information needs
Short and long-term information systems and technologies

Notes:


USDA-APHIS
PREPARE A PROJECT PLAN
■ Gather information about IICA (organization, activities, data, information needs)
■ Modify proposed project plan for ISP development
■ ISP development by IICA team

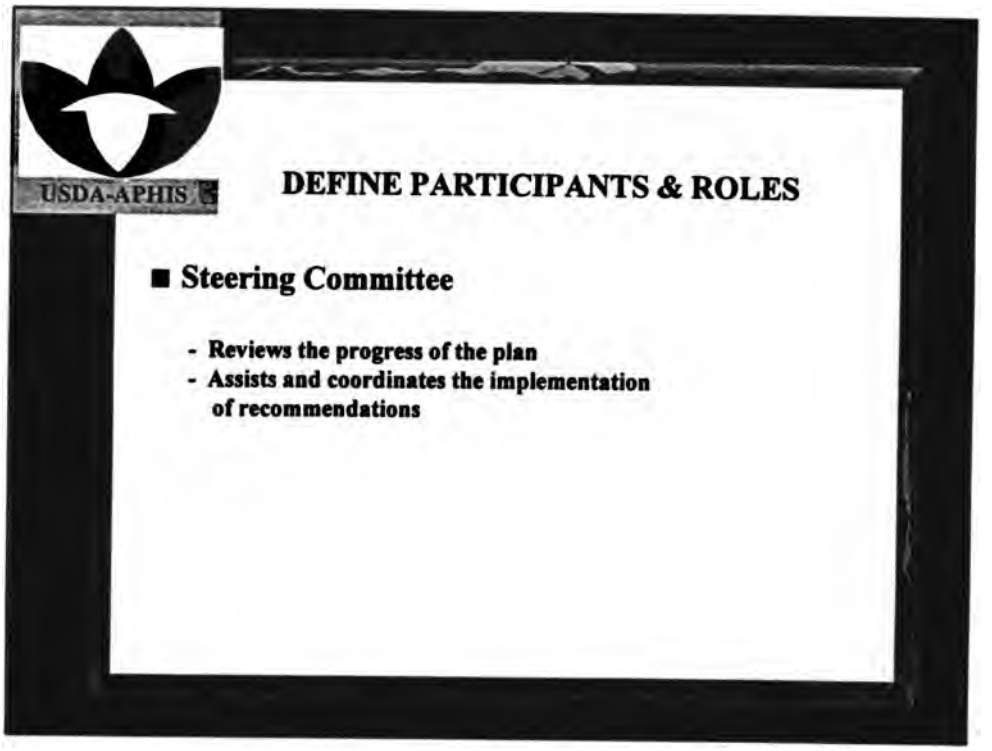
Notes:


USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Executive sponsor
■ Steering committee
■ Team leader
■ Team members
■ Other IICA staff
■ Facilitators

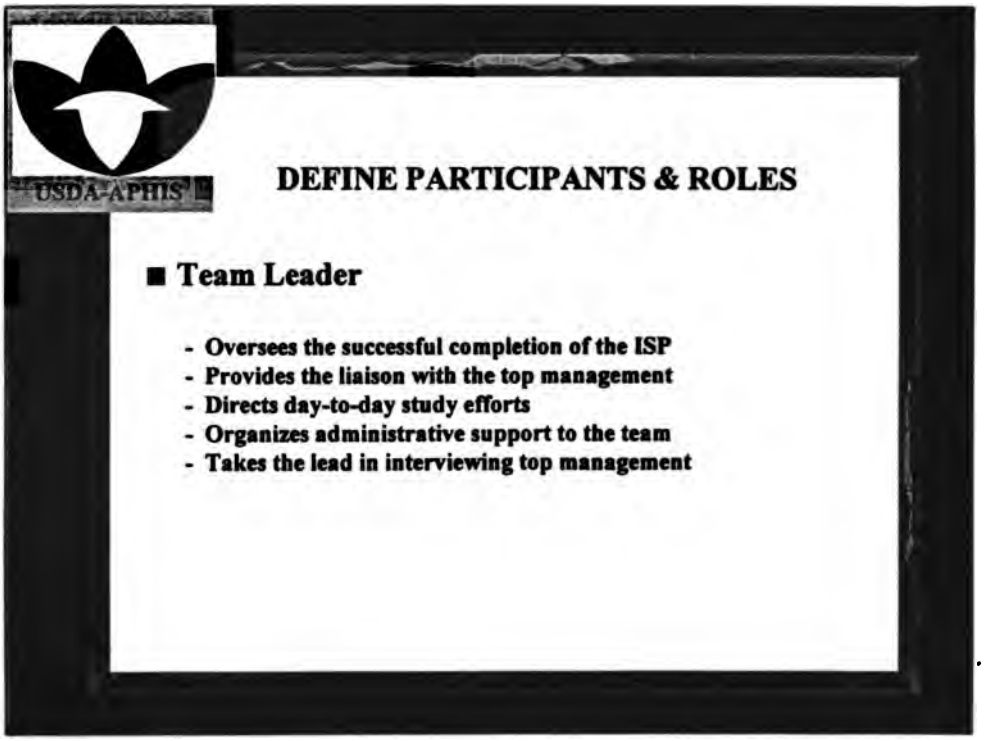
Notes:

USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Executive Sponsor
- Communicates the importance of the project to staff
- Makes resources available
- Appoints the team leader
- Receives the plan
- Decides on and oversees the implementation of recommendations

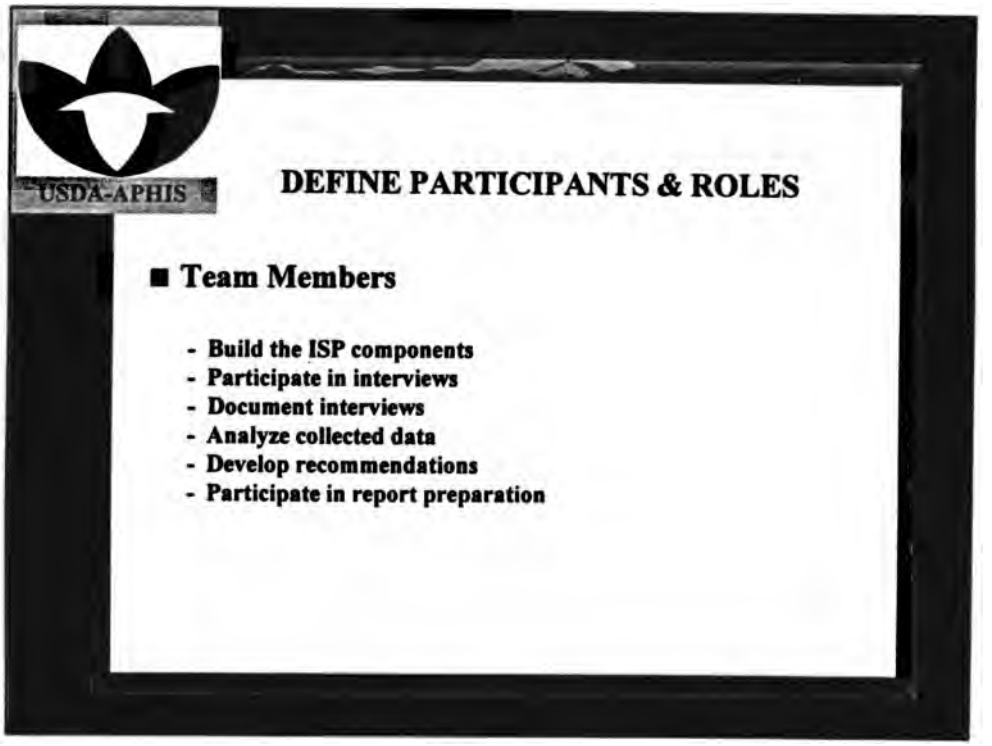
Notes:


USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Steering Committee
- Reviews the progress of the plan
- Assists and coordinates the implementation of recommendations

Notes:


USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Team Leader
- Oversees the successful completion of the ISP
- Provides the liaison with the top management
- Directs day-to-day study efforts
- Organizes administrative support to the team
- Takes the lead in interviewing top management

Notes:


USDA-APHIS
DEFINE PARTICIPANTS & ROLES
Team Members
- Build the ISP components
- Participate in interviews
- Document interviews
- Analyze collected data
- Develop recommendations
- Participate in report preparation

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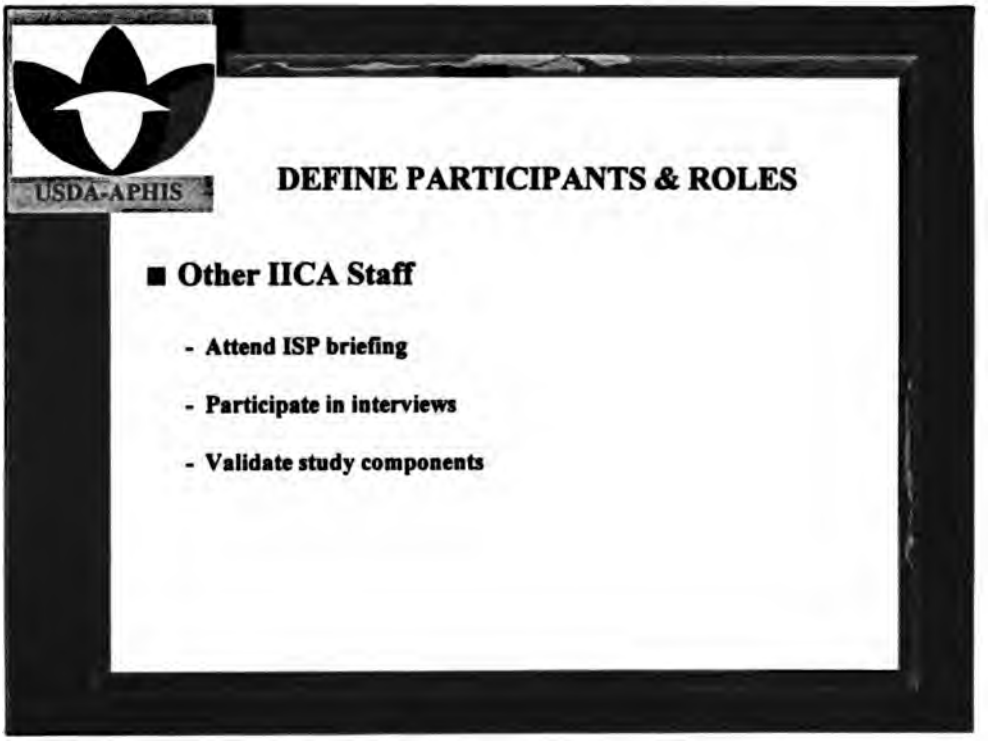
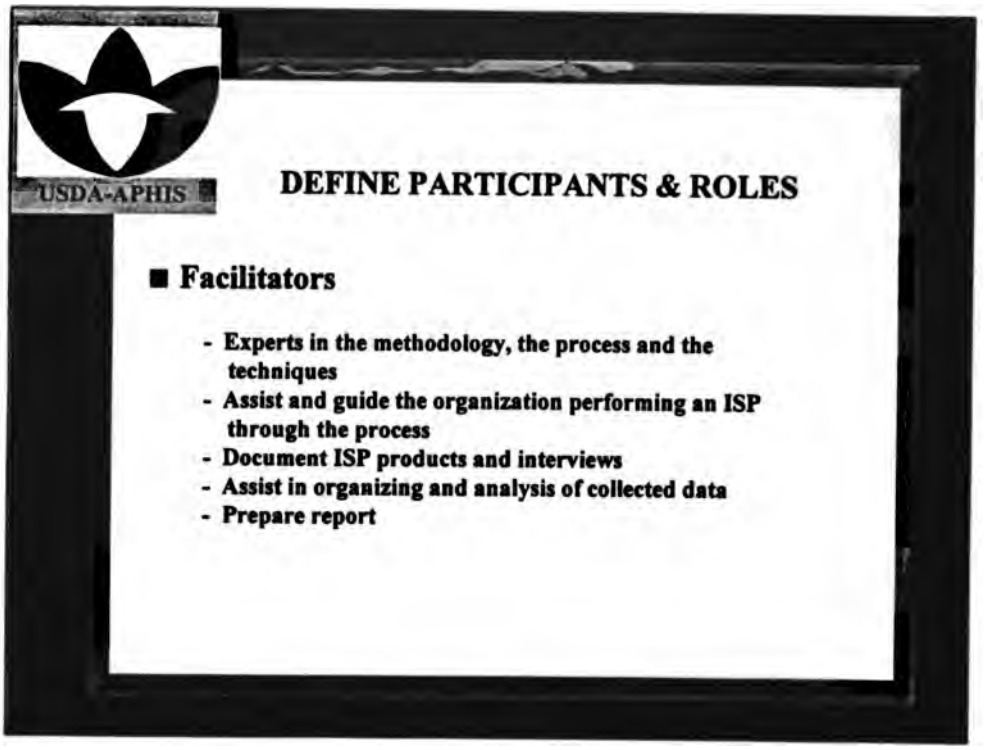
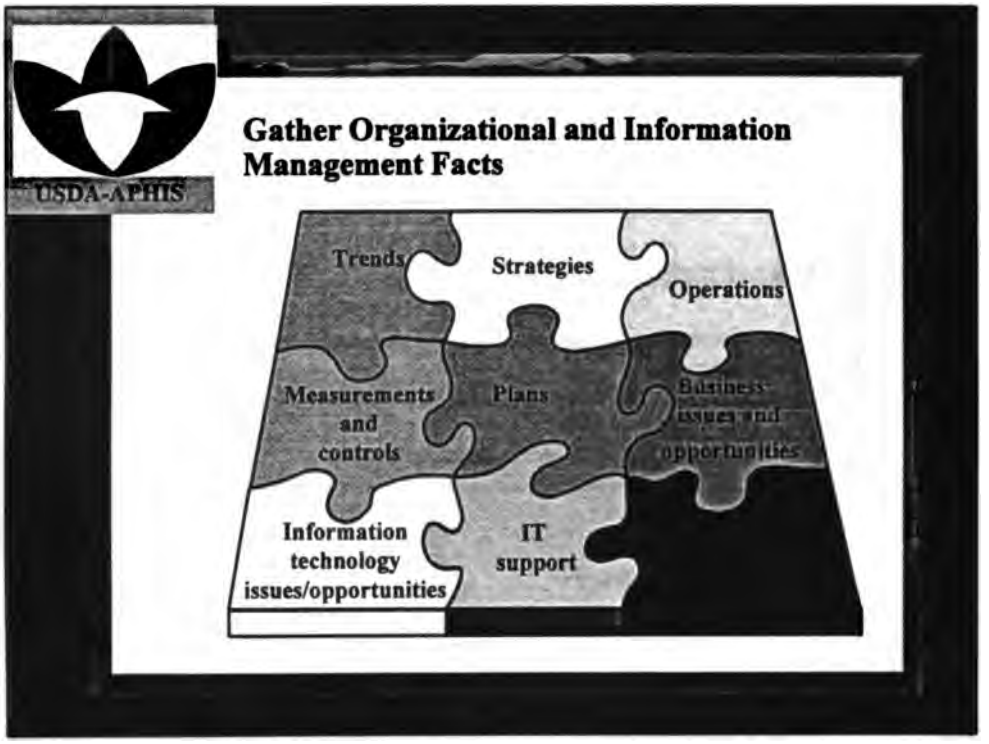

USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Other IICA Staff
- Attend ISP briefing
- Participate in interviews
- Validate study components

Notes:


USDA-APHIS
DEFINE PARTICIPANTS & ROLES
■ Facilitators
- Experts in the methodology, the process and the techniques
- Assist and guide the organization performing an ISP through the process
- Document ISP products and interviews
- Assist in organizing and analysis of collected data
- Prepare report

Notes:


USDA-APHIS
Gather Organizational and Information Management Facts
Trends
Strategies
Operations
Measurements and controls
Plans
Business issues and opportunities
Information technology issues/opportunities
IT support

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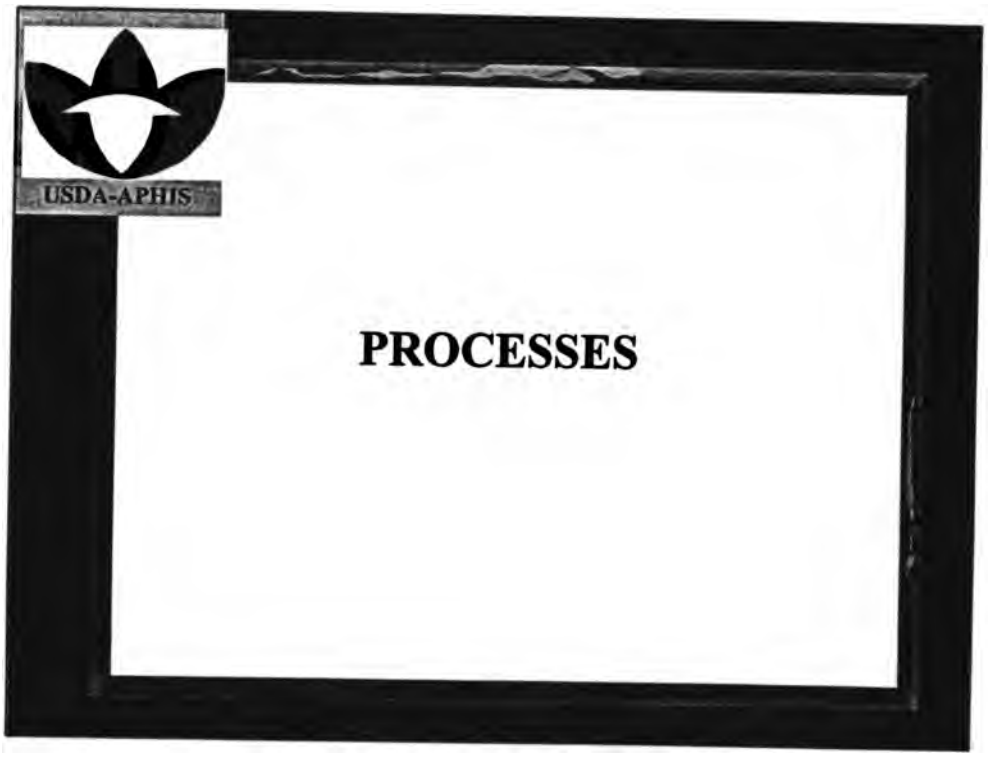

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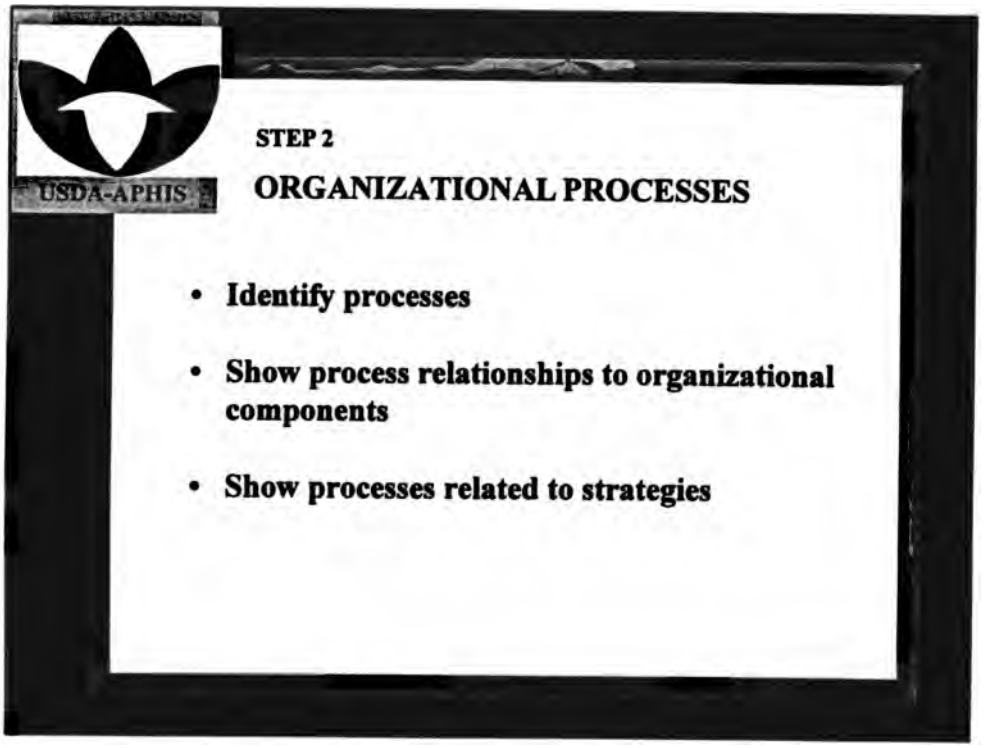
USDA-APHIS
STEP 2
ORGANIZATIONAL PROCESSES
• Identify processes
• Show process relationships to organizational components
• Show processes related to strategies

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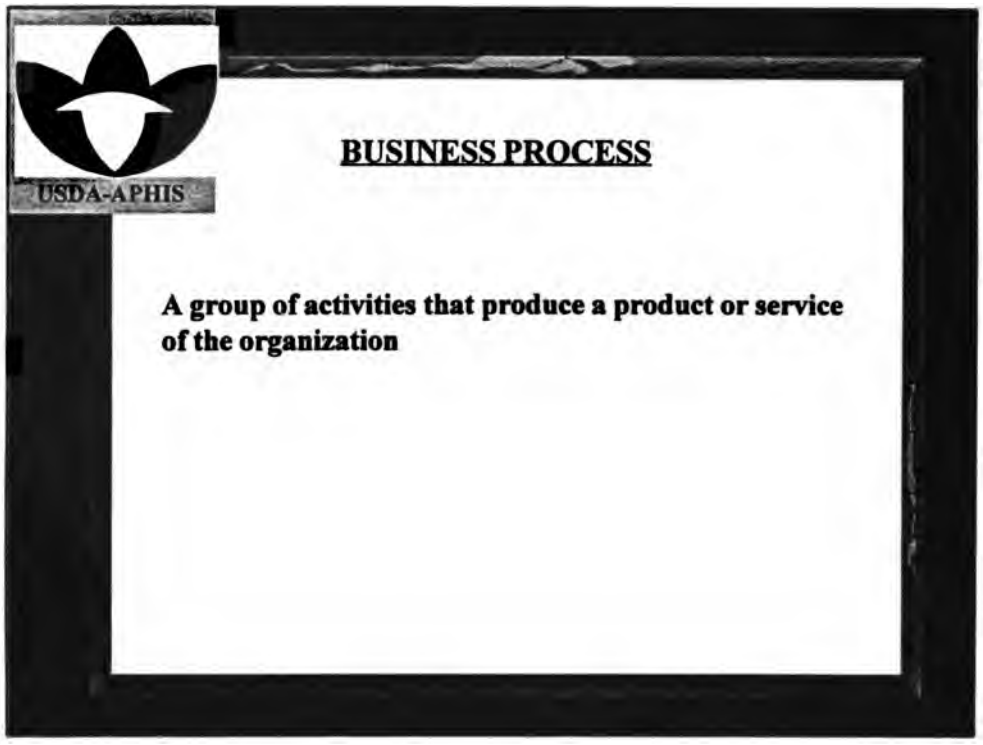
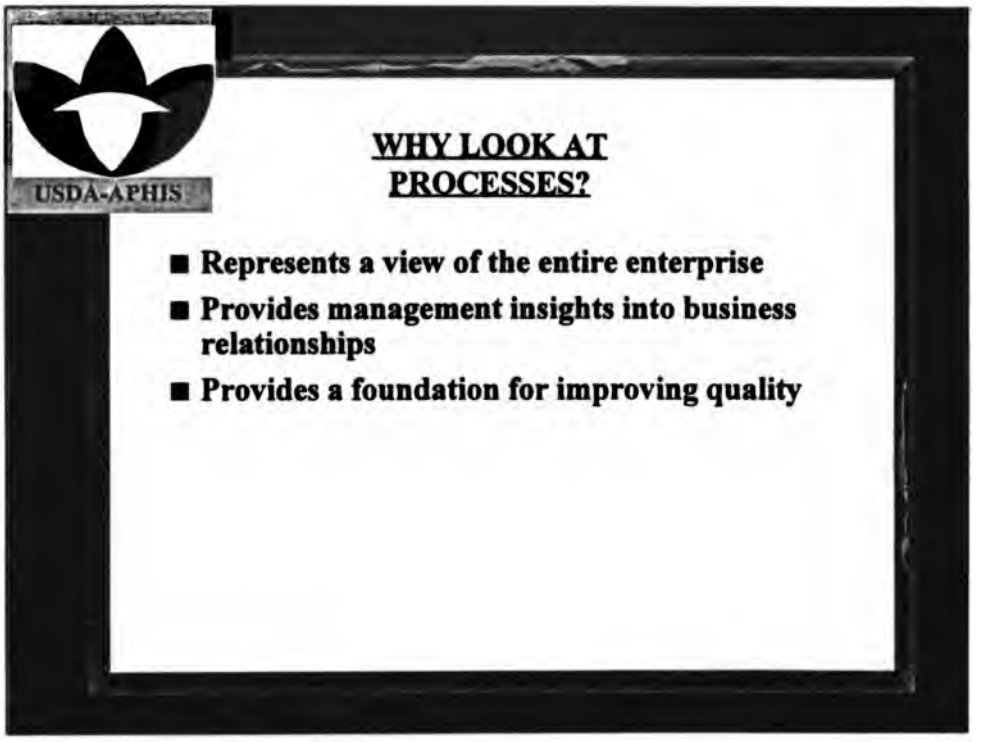

USDA-APHIS
BUSINESS PROCESS
A group of activities that produce a product or service of the organization

Notes:


USDA-APHIS
WHY LOOK AT PROCESSES?
■ Represents a view of the entire enterprise
■ Provides management insights into business relationships
■ Provides a foundation for improving quality

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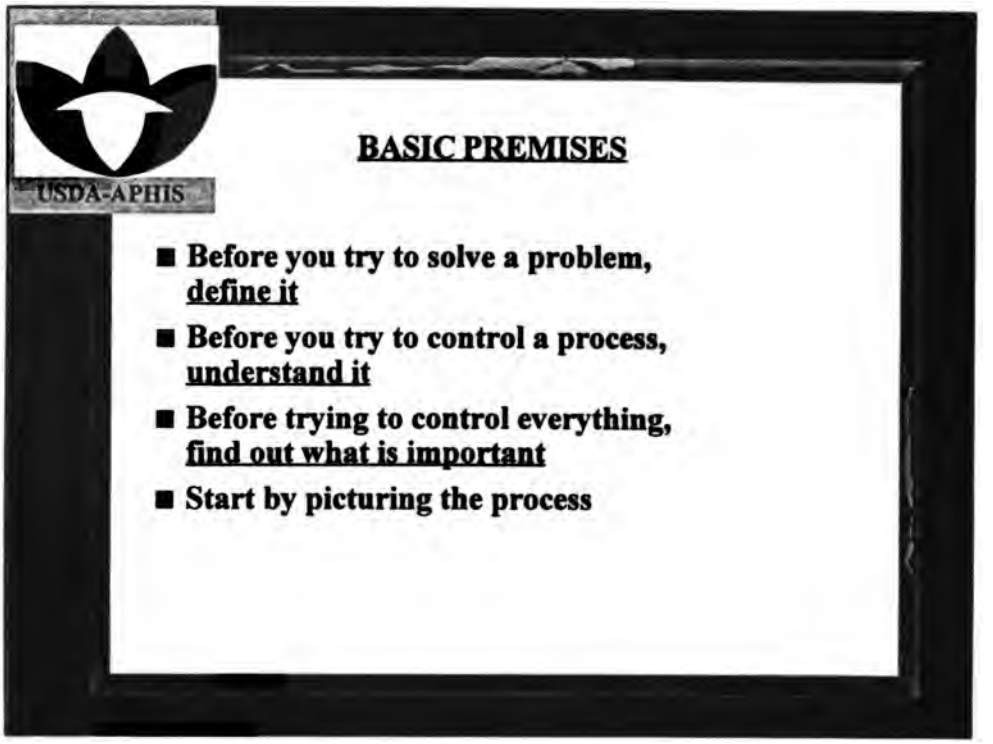
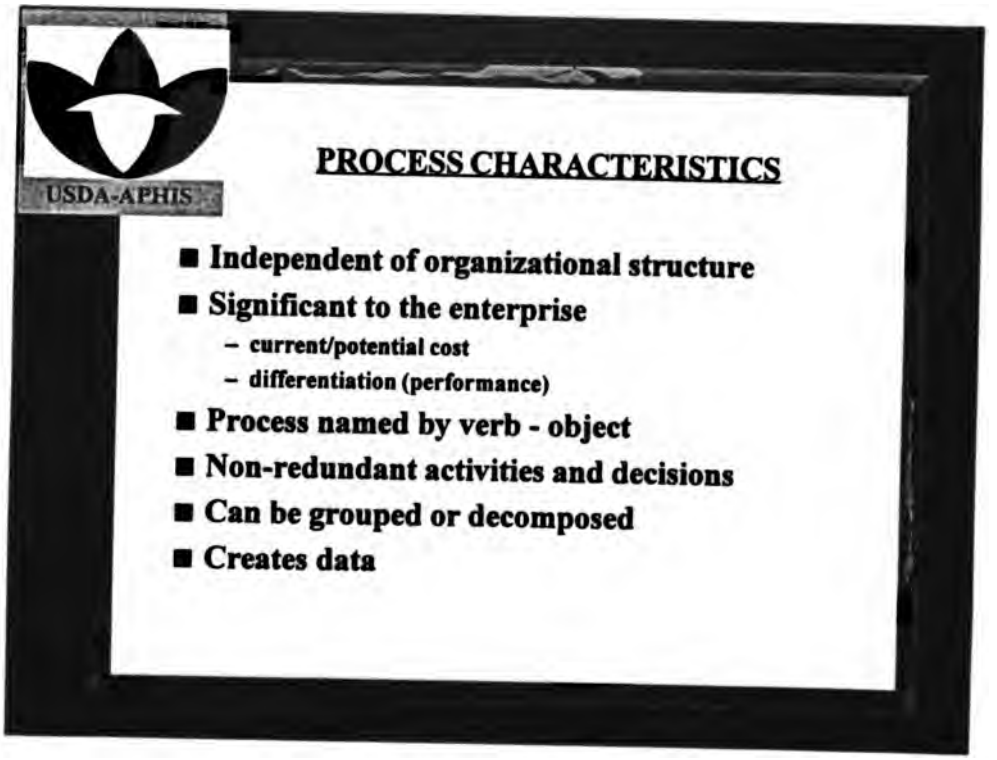
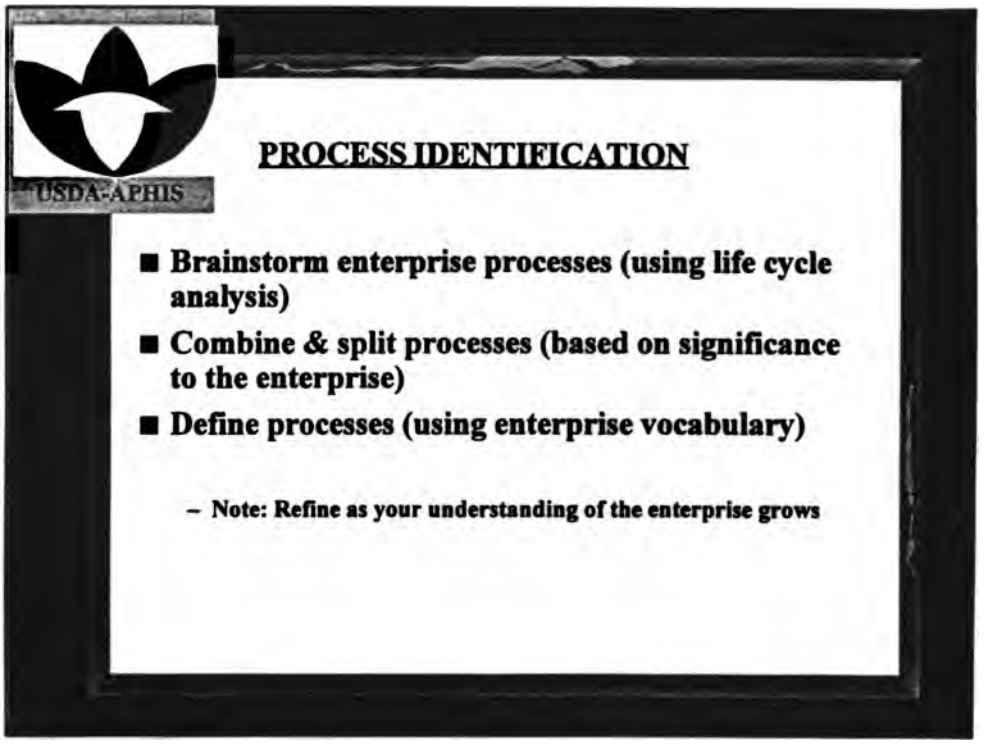

USDA-APHIS
BASIC PREMISES
■ Before you try to solve a problem, define it
■ Before you try to control a process, understand it
■ Before trying to control everything, find out what is important
■ Start by picturing the process

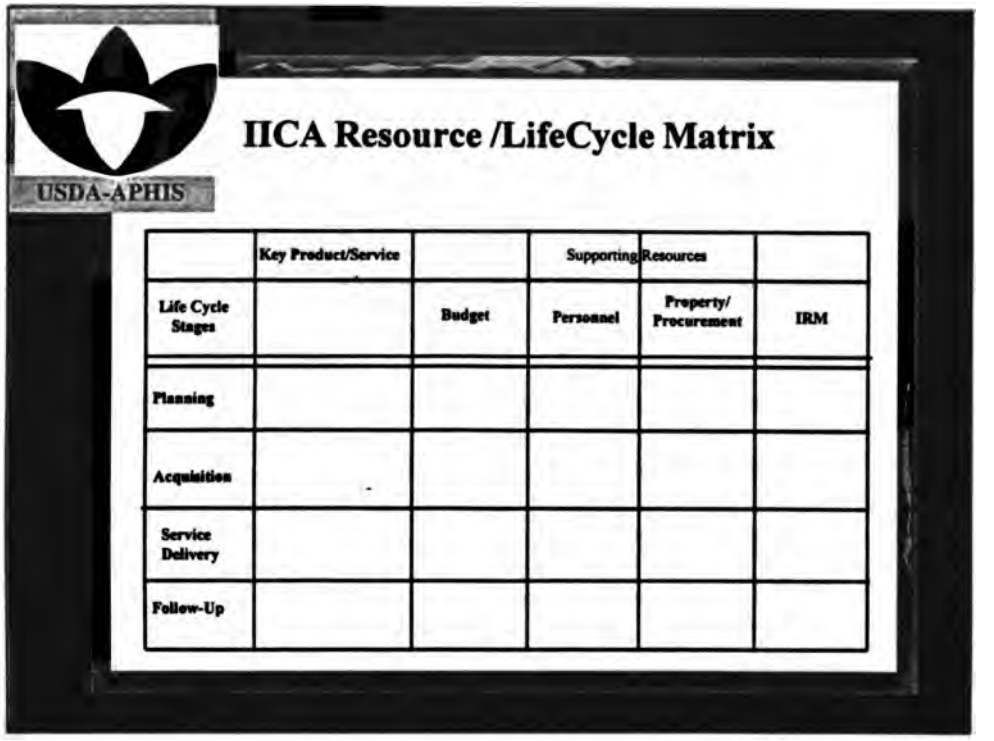
Notes:


USDA-APHIS
PROCESS CHARACTERISTICS
Independent of organizational structure
Significant to the enterprise
– current/potential cost
– differentiation (performance)
Process named by verb - object
Non-redundant activities and decisions
Can be grouped or decomposed
Creates data

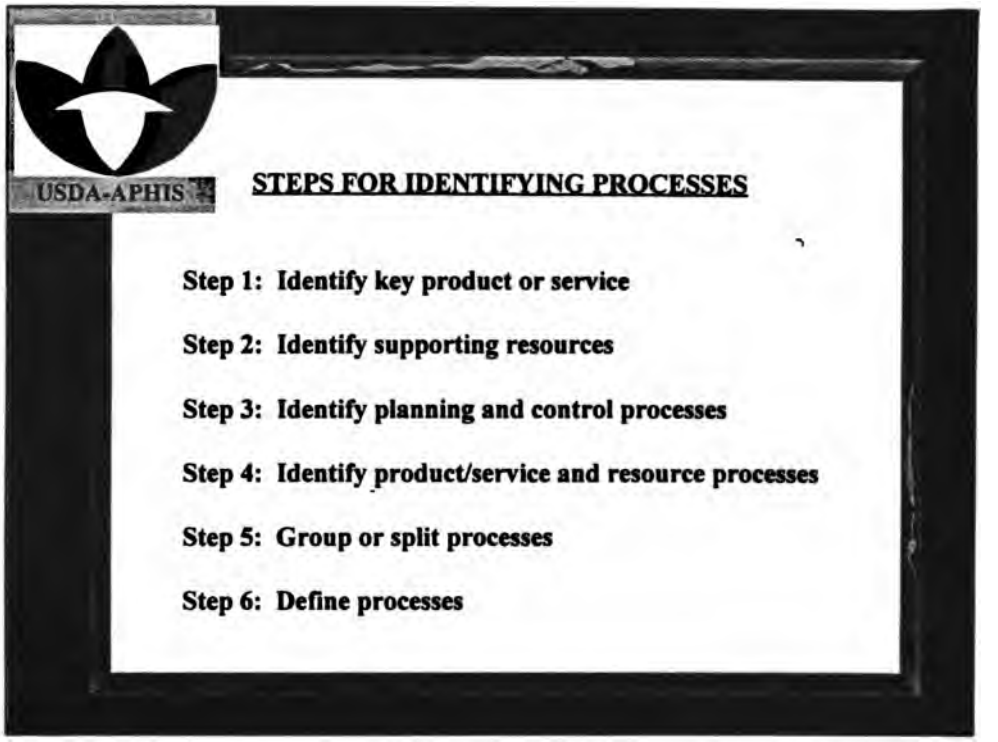
Notes:


USDA-APHIS
PROCESS IDENTIFICATION
■ Brainstorm enterprise processes (using life cycle analysis)
■ Combine & split processes (based on significance to the enterprise)
■ Define processes (using enterprise vocabulary)
– Note: Refine as your understanding of the enterprise grows

Notes:


USDA-APHIS
IICA Resource /LifeCycle Matrix
Key Product/Service
Supporting Resources
Life Cycle Stages
Budget
Personnel
Property/ Procurement
IRM
Planning
Acquisition
Service Delivery
Follow-Up

Notes:


USDA-APHIS
STEPS FOR IDENTIFYING PROCESSES
Step 1: Identify key product or service
Step 2: Identify supporting resources
Step 3: Identify planning and control processes
Step 4: Identify product/service and resource processes
Step 5: Group or split processes
Step 6: Define processes

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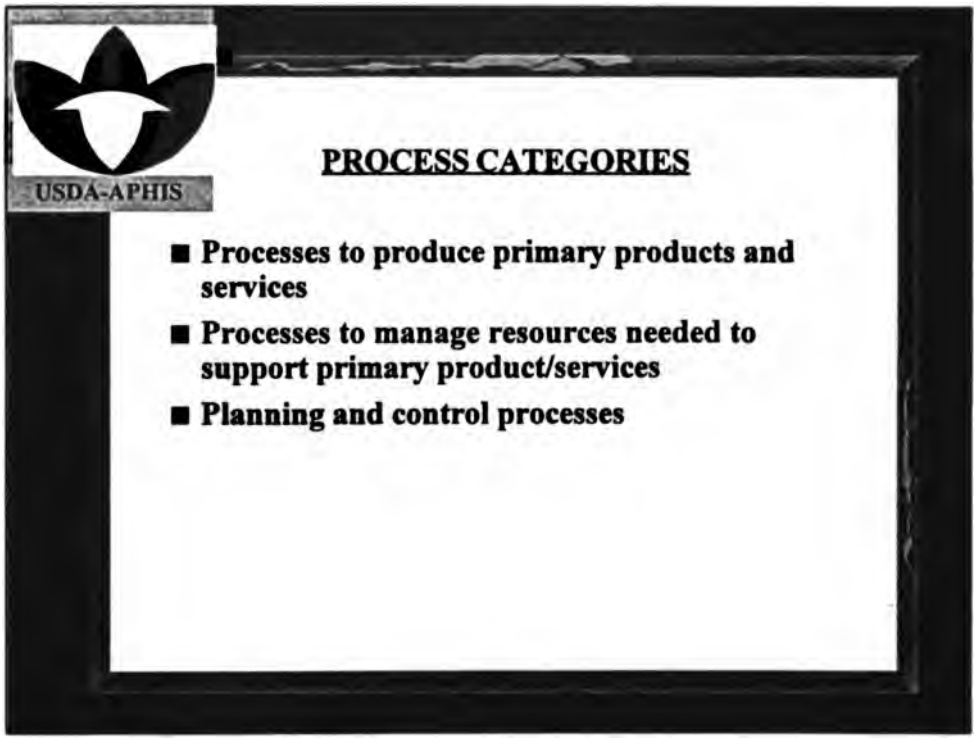
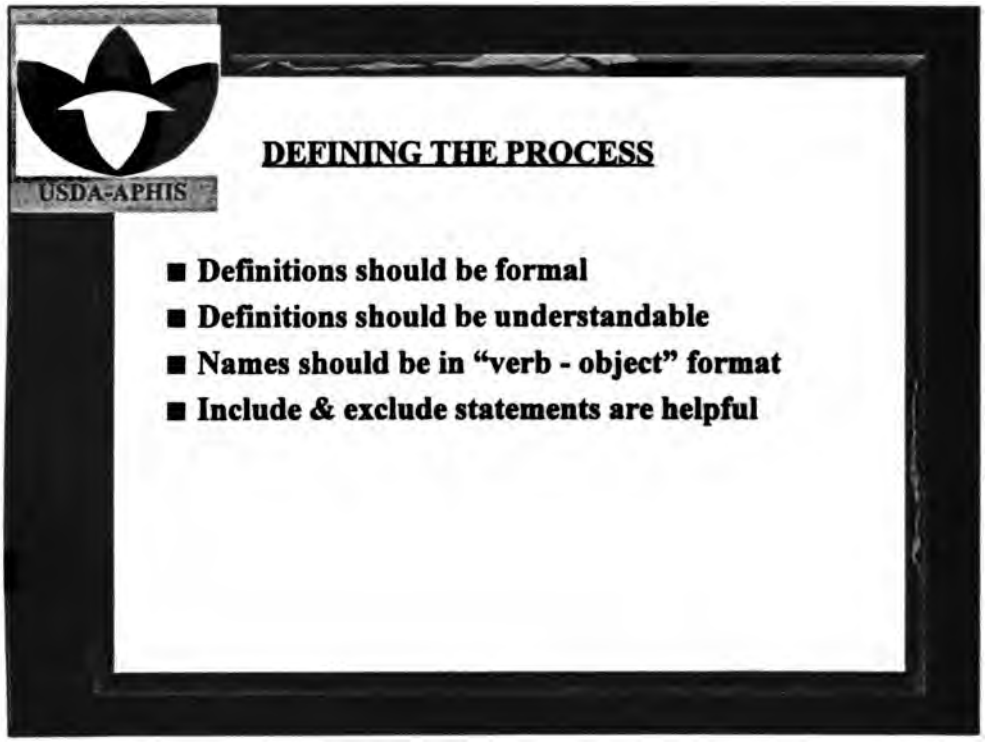
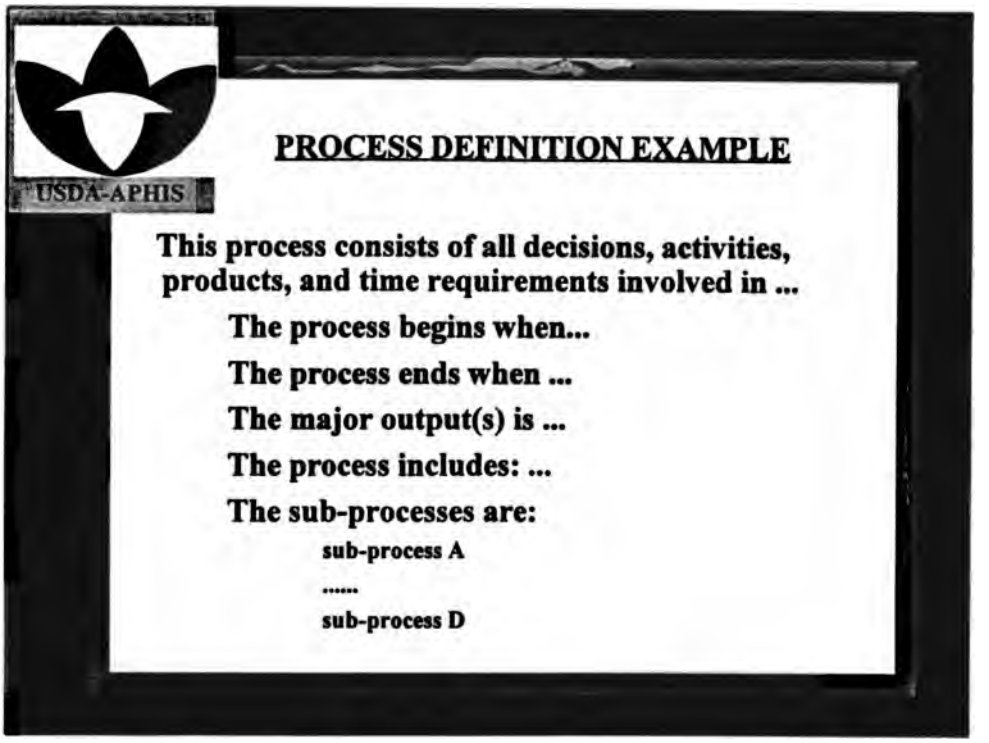

USDA-APHIS
PROCESS CATEGORIES
■ Processes to produce primary products and services
■ Processes to manage resources needed to support primary product/services
■ Planning and control processes

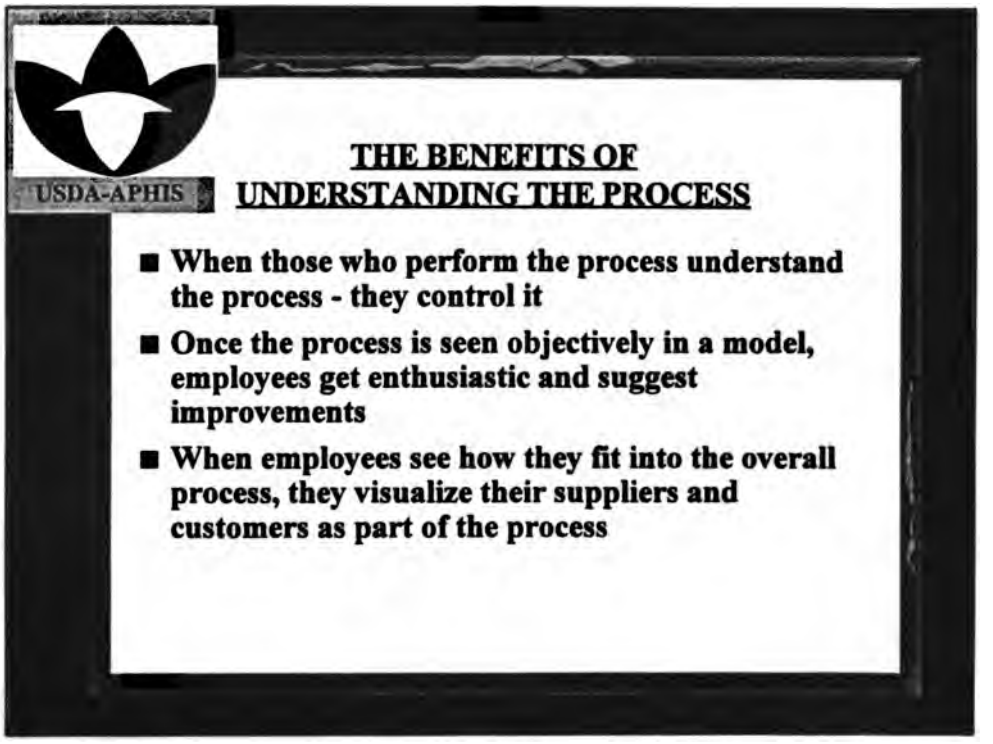
Notes:


USDA-APHIS
DEFINING THE PROCESS
■ Definitions should be formal
■ Definitions should be understandable
■ Names should be in "verb - object" format
■ Include & exclude statements are helpful

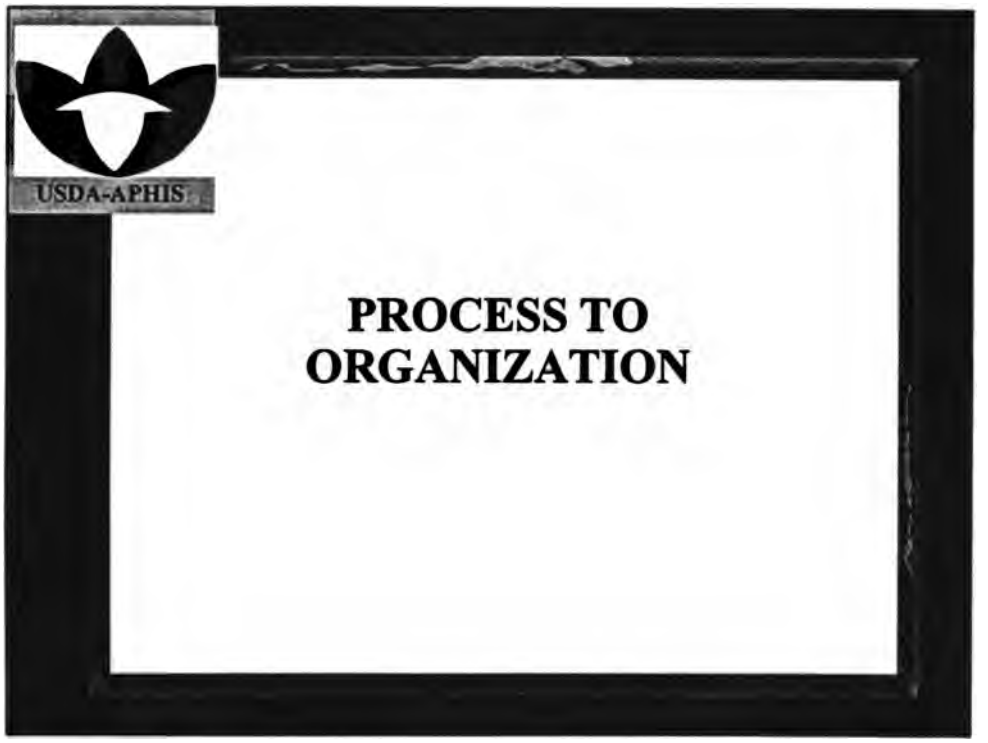
Notes:


USDA-APHIS
PROCESS DEFINITION EXAMPLE
This process consists of all decisions, activities, products, and time requirements involved in ...
The process begins when...
The process ends when ...
The major output(s) is ...
The process includes: ...
The sub-processes are:
sub-process A
.....
sub-process D

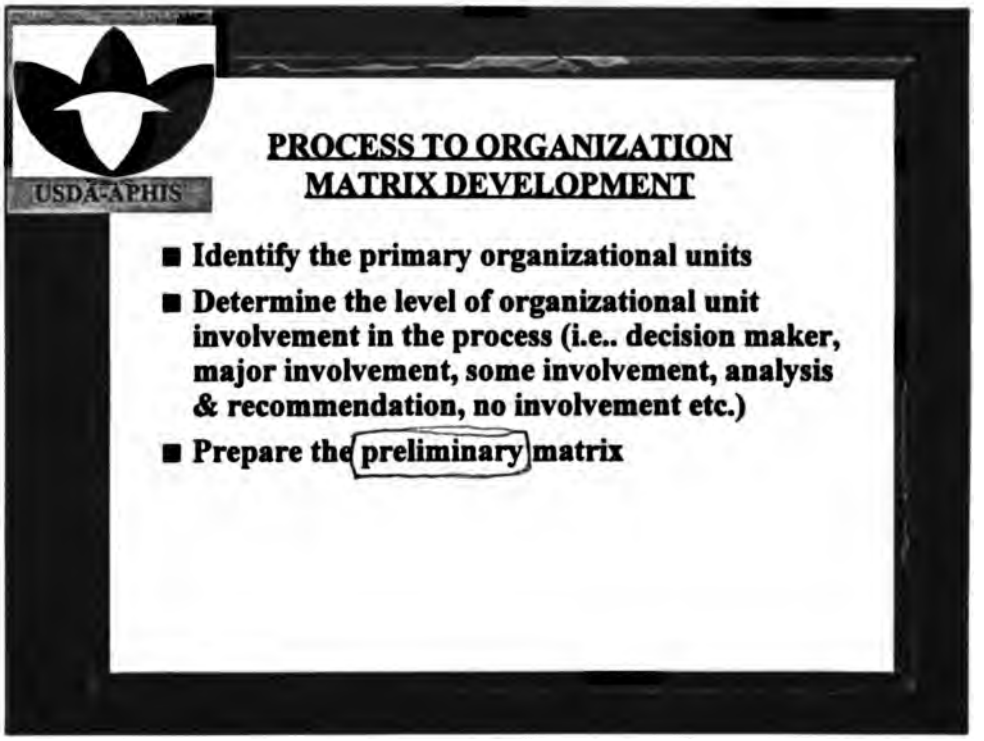
Notes:


USDA-APHIS
THE BENEFITS OF
UNDERSTANDING THE PROCESS
■ When those who perform the process understand the process - they control it
■ Once the process is seen objectively in a model, employees get enthusiastic and suggest improvements
■ When employees see how they fit into the overall process, they visualize their suppliers and customers as part of the process

Notes:

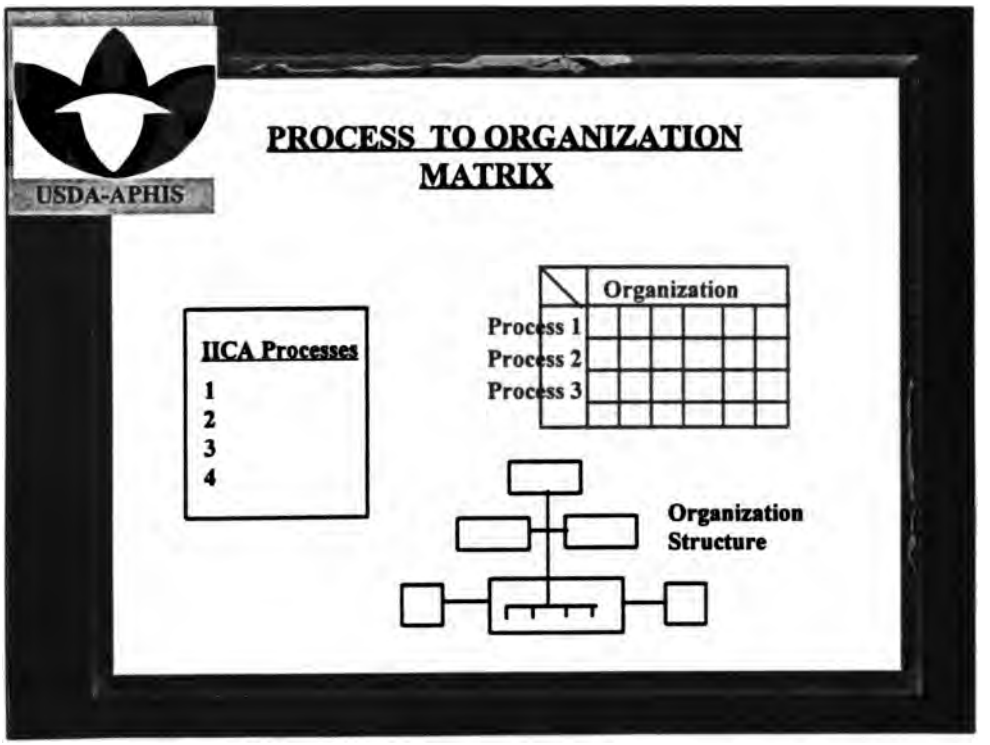


Notes:



Strategic view of the organization.

identify : decision maker - worker


USDA-APHIS
PROCESS TO ORGANIZATION MATRIX
IICA Processes
1
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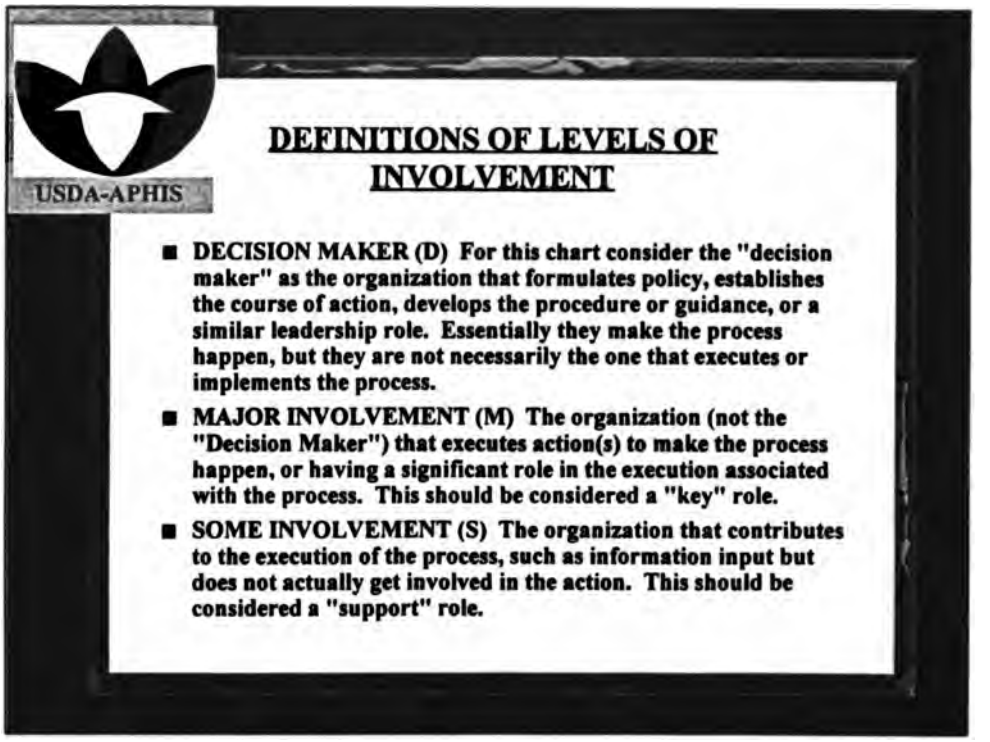
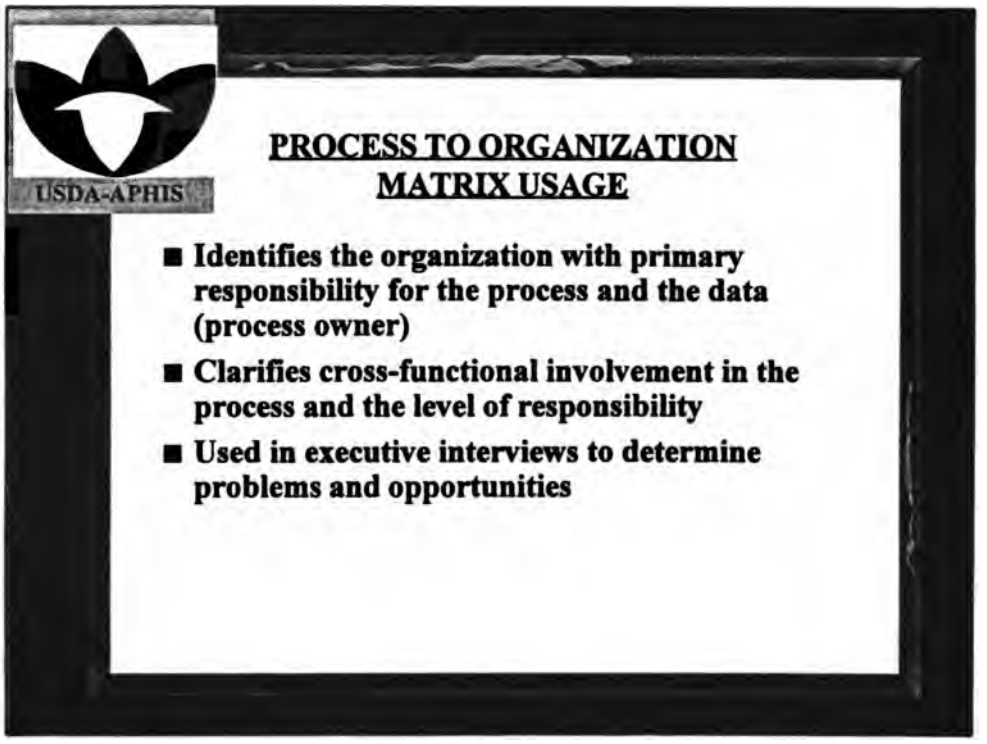
3
4
Organization
Process 1
Process 2
Process 3
Organization Structure

Notes:



Notes:

IICA-CIDIA


USDA-APHIS
PROCESS TO ORGANIZATION MATRIX USAGE
■ Identifies the organization with primary responsibility for the process and the data (process owner)
■ Clarifies cross-functional involvement in the process and the level of responsibility
■ Used in executive interviews to determine problems and opportunities

Notes:

IICA Process to Organization Matrix

Office of the Director General

	Organization / Processes	Office of Dir. General	Deputy Dir. General	Advisors to Dir. General	Exec. Tech Secretariat	COARDI
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D = Decision Maker
A = Analysis / Recommend
M = Minor Involvement
N = No Involvement

IICA Process to Organization Matrix

	Organization / Processes	Office of the Director General		Support Units		
		Legal Advisor	Admin. & Financial Audit	DIPRAT	DIREX	Dir. Human Resources
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IICA Process to Organization Matrix

	Organization / Processes	Support Units		Technical Cooperation Units		
		Dir. of Finance	Dir. of Admin.	Dir. of Soc. Policy, Trade	Dir. Sci & Tech Nat. Res. Agric	Dir. of Agric. Health
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IICA Process to Organization Matrix

Technical Cooperation Units

	Organization / Processes	Dir. of Sustble. Rural Develop.	Dir of Traing. Educ.& Comm	Dir. of Info. Doc & Informatics	Dir. of Strategic Thinkg
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IICA Process to Organization Matrix

Regional Technical Cooperation Centers

Organization / Processes		Region 1 Caribbean	Region 2 Central	Region 3 Andean	Region 4 Southern	Region 5 Northern
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IICA Process to Organization Matrix

Regional Technical Cooperation Centers

	Organization / Processes	Tech. Coop Agency 1	Tech. Coop Agency 2	Tech. Coop Agency 3	Tech. Coop Agency 4	Tech. Coop Agency 5
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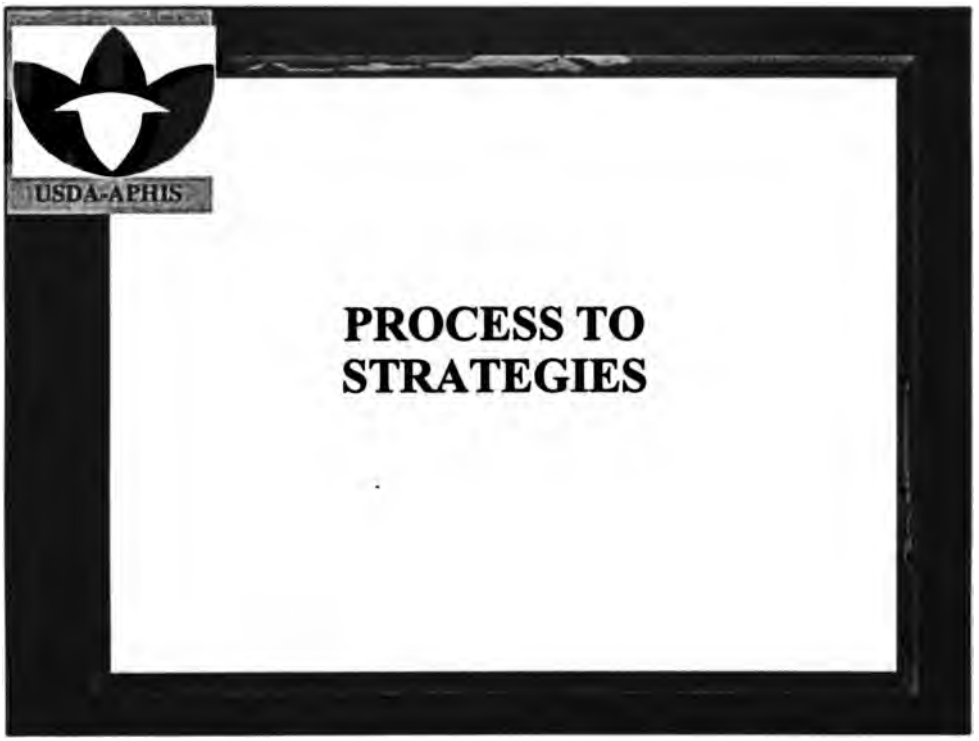
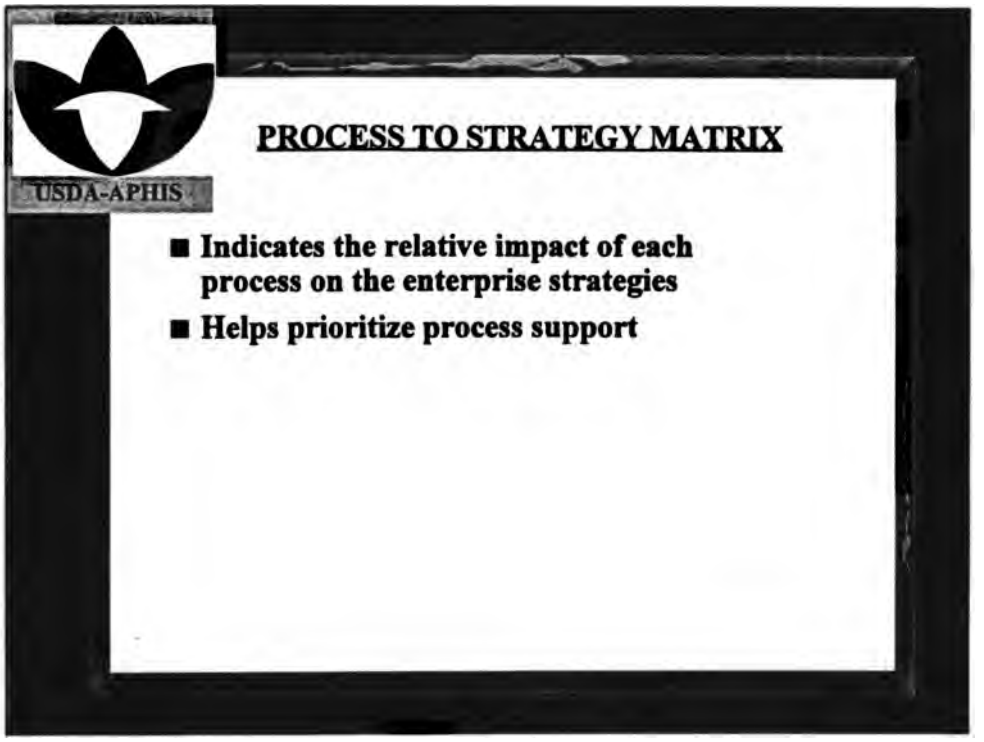
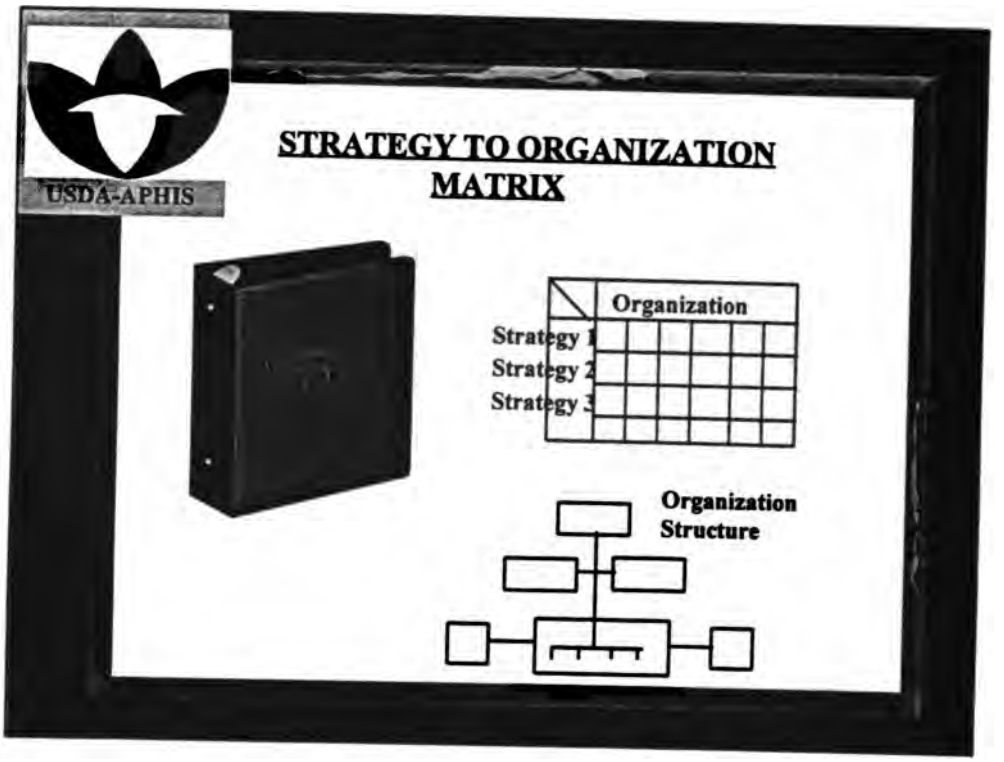


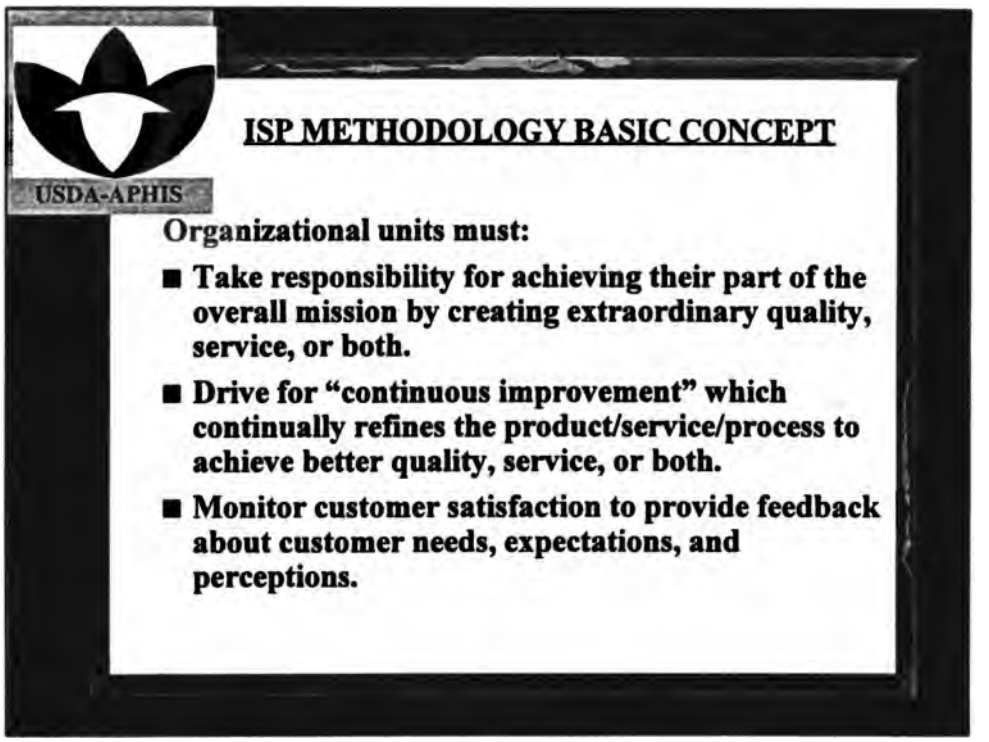
Notes:


USDA-APHIS
PROCESS TO STRATEGY MATRIX
Indicates the relative impact of each process on the enterprise strategies
Helps prioritize process support

Notes:


USDA-APHIS
STRATEGY TO ORGANIZATION MATRIX
Organization
Strategy 1
Strategy 2
Strategy 3
Organization Structure

Notes:


USDA-APHIS
ISP METHODOLOGY BASIC CONCEPT
Organizational units must:
■ Take responsibility for achieving their part of the overall mission by creating extraordinary quality, service, or both.
■ Drive for "continuous improvement" which continually refines the product/service/process to achieve better quality, service, or both.
■ Monitor customer satisfaction to provide feedback about customer needs, expectations, and perceptions.

Notes:

IICA Process to Strategy Matrix

	Process	Strategy										
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M = Major Impact S = Some Impact N = No Impact

IICA Process to Strategy Matrix

Process	Strategy										
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M = Major Impact S = Some Impact N = No Impact

IICA Strategy to Organization Matrix

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IICA Strategy to Organization Matrix

Technical Cooperation Units

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IICA Strategy to Organization Matrix

Regional Technical Cooperation Centers

	Organization / Strategy	Region 1 Caribbean	Region 2 Central	Region 3 Andean	Region 4 Southern	Region 5 Northern
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IICA Strategy to Organization Matrix

Regional Technical Cooperation Centers

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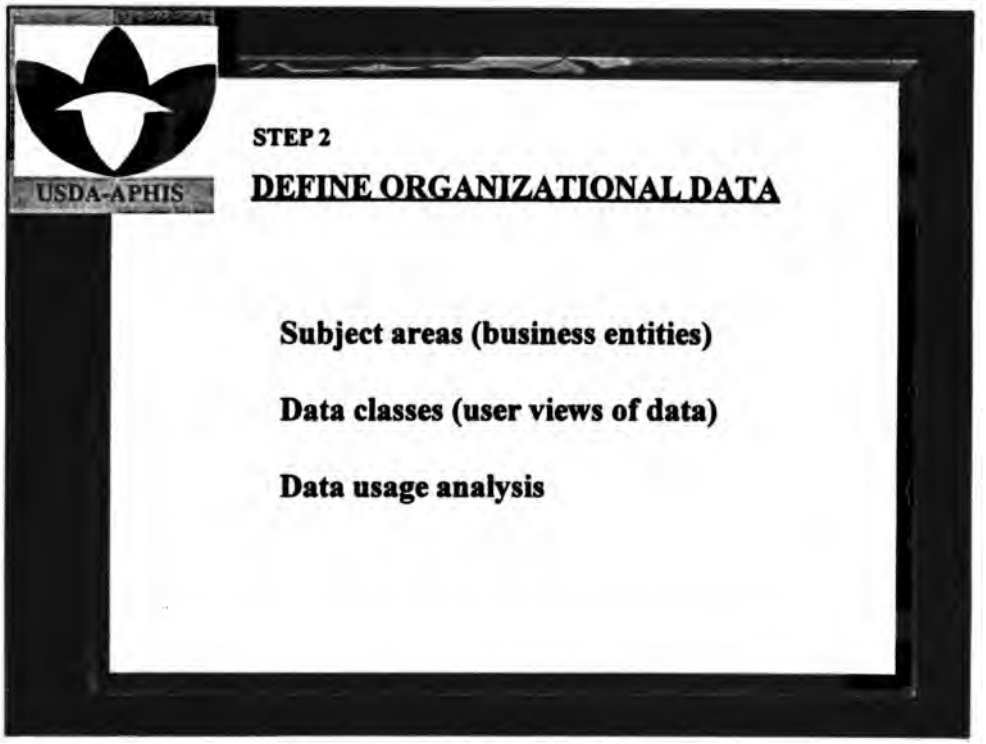
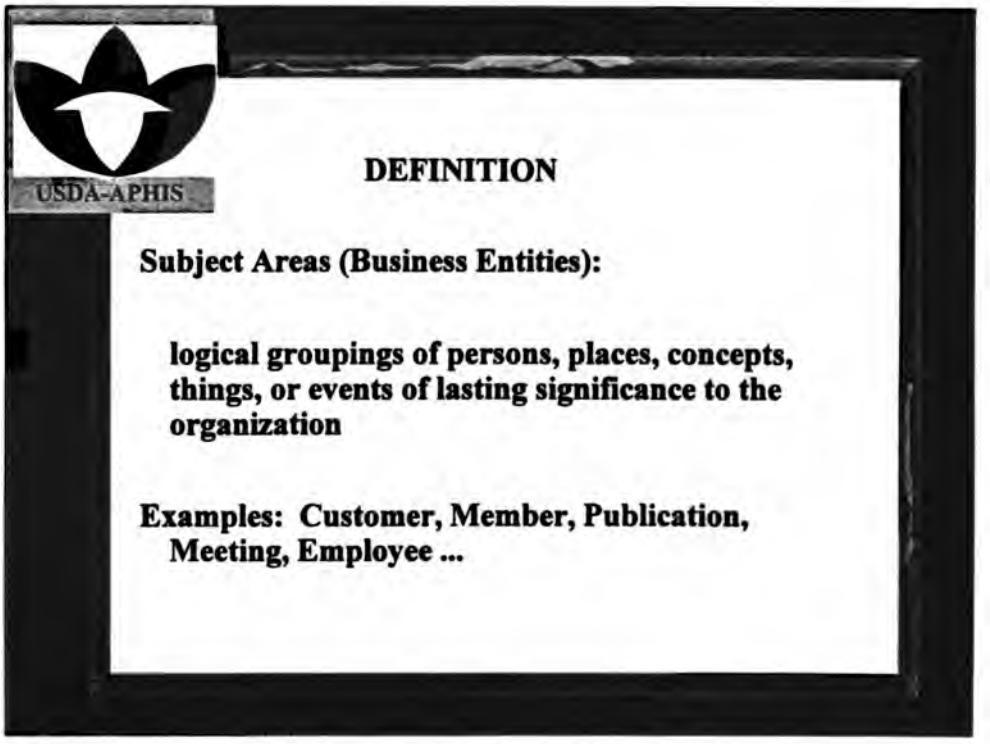
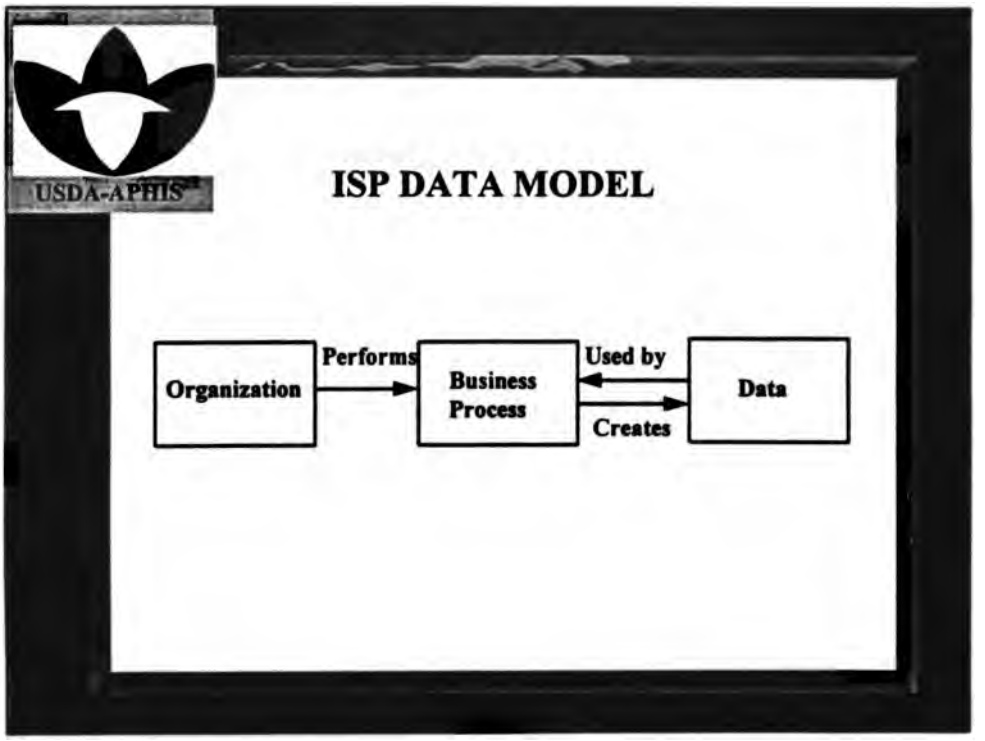
Notes:


USDA-APHIS
STEP 2
DEFINE ORGANIZATIONAL DATA
Subject areas (business entities)
Data classes (user views of data)
Data usage analysis

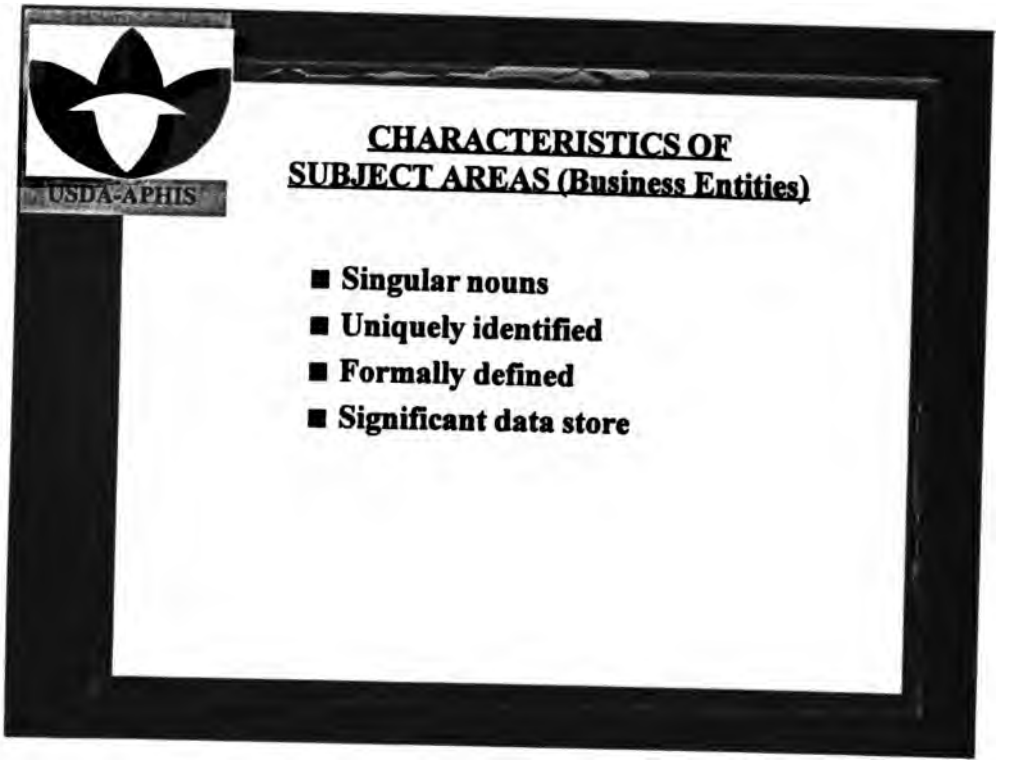
Notes:


USDA-APHIS
DEFINITION
Subject Areas (Business Entities):
logical groupings of persons, places, concepts, things, or events of lasting significance to the organization
Examples: Customer, Member, Publication, Meeting, Employee ...

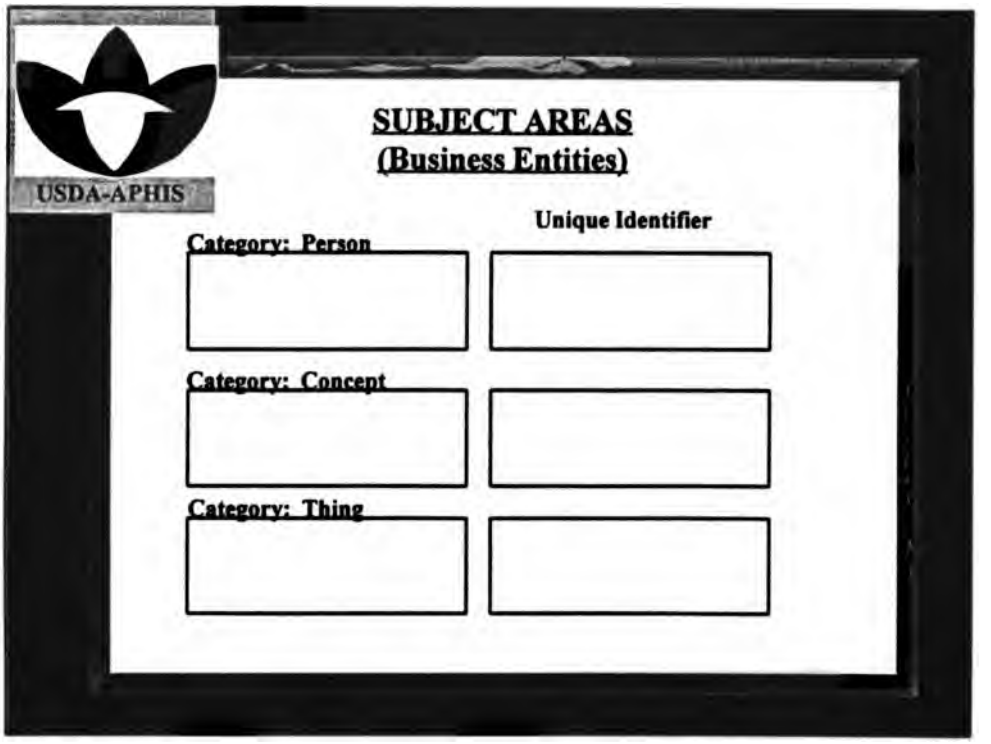
Notes:


USDA-APHIS
ISP DATA MODEL
Organization
Performs
Business Process
Used by
Creates
Data

Notes:


USDA-APHIS
CHARACTERISTICS OF
SUBJECT AREAS (Business Entities)
Singular nouns
Uniquely identified
Formally defined
Significant data store

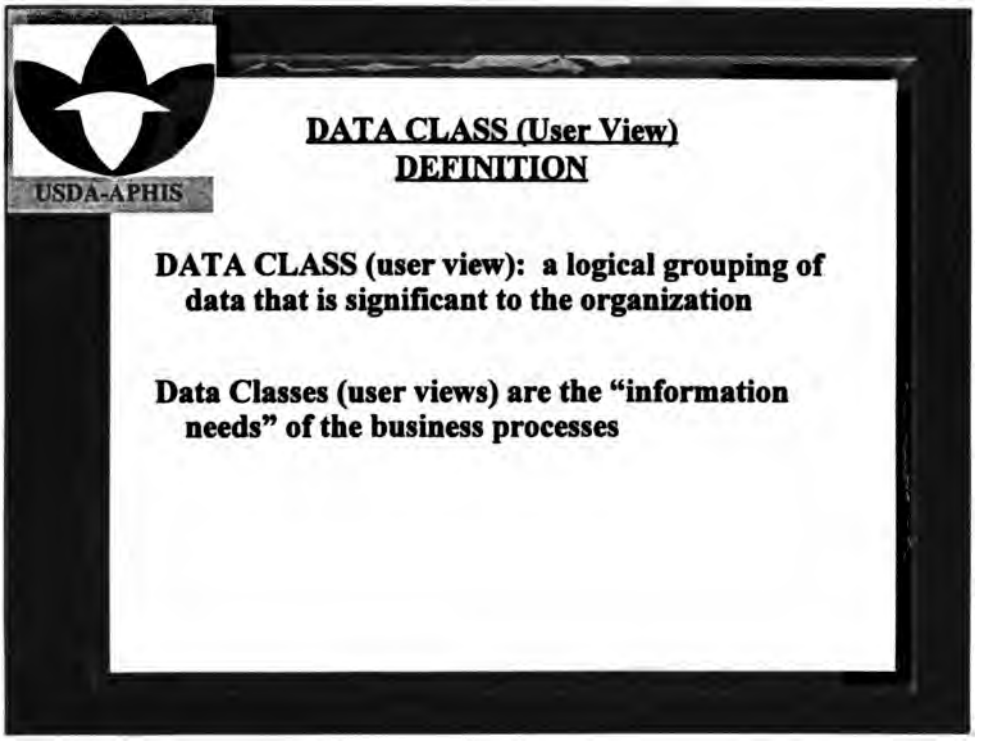
Notes:


USDA-APHIS
SUBJECT AREAS
(Business Entities)
Unique Identifier
Category: Person
Category: Concept
Category: Thing

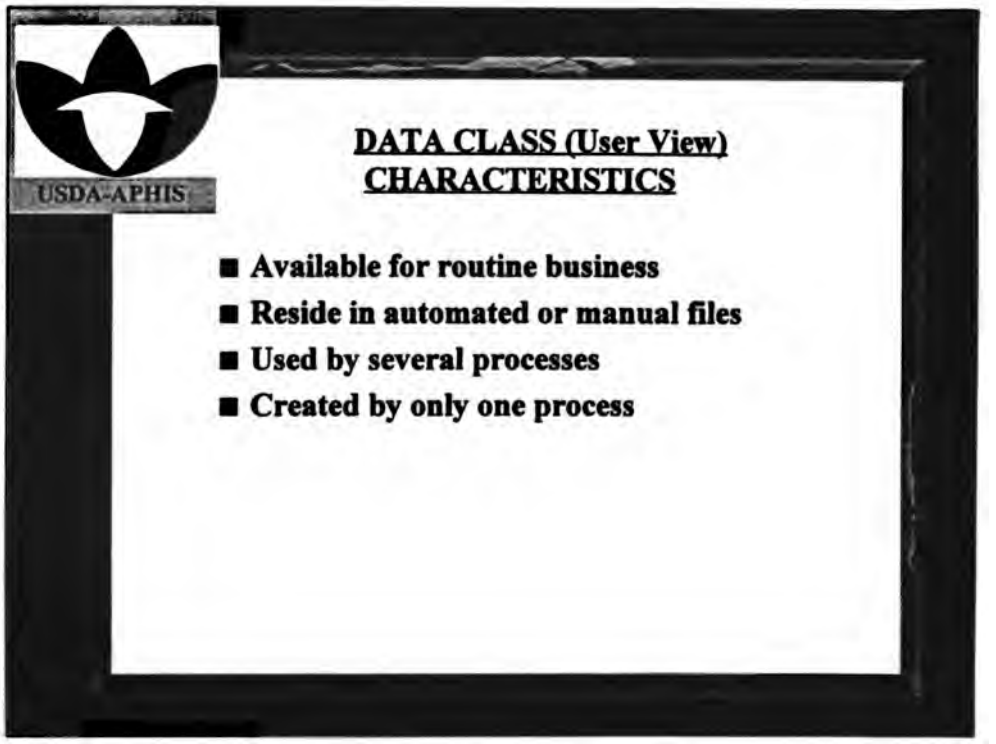
Notes:

USDA-APHIS
SUBJECT AREA (Business Entity)
DEFINITION
IICA EMPLOYEE:
Unique Identifier: Employee ID #

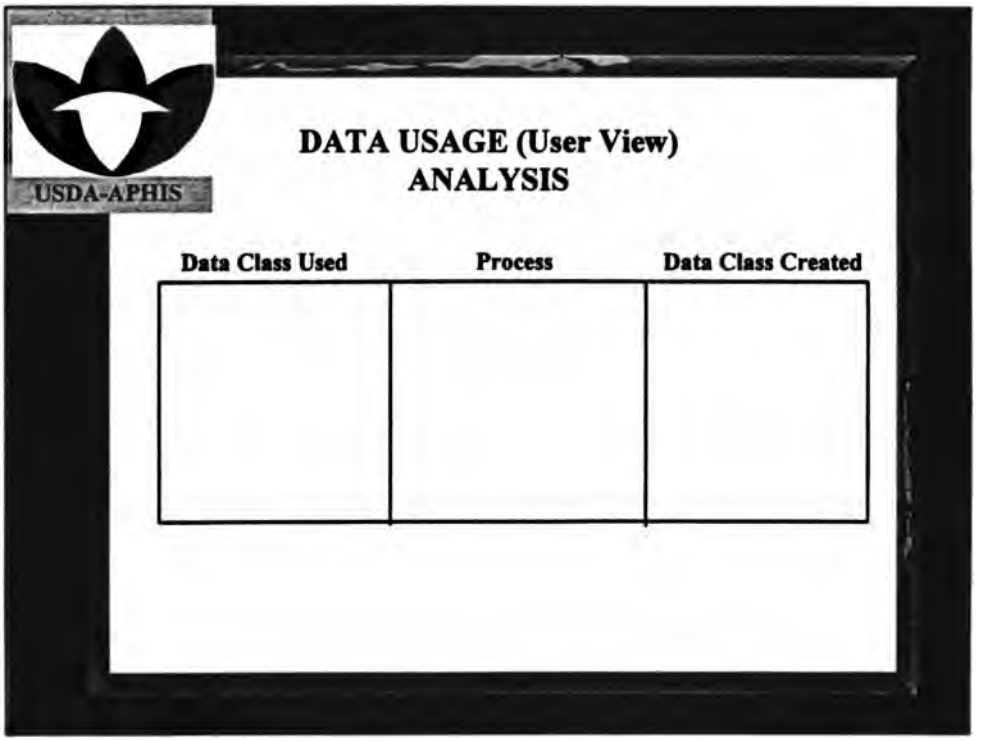
Notes:


USDA-APHIS
DATA CLASS (User View)
DEFINITION
DATA CLASS (user view): a logical grouping of data that is significant to the organization
Data Classes (user views) are the "information needs" of the business processes

Notes:


USDA-APHIS
DATA CLASS (User View)
CHARACTERISTICS
■ Available for routine business
■ Reside in automated or manual files
■ Used by several processes
■ Created by only one process

Notes:


USDA-APHIS
DATA USAGE (User View)
ANALYSIS
Data Class Used
Process
Data Class Created

Notes:

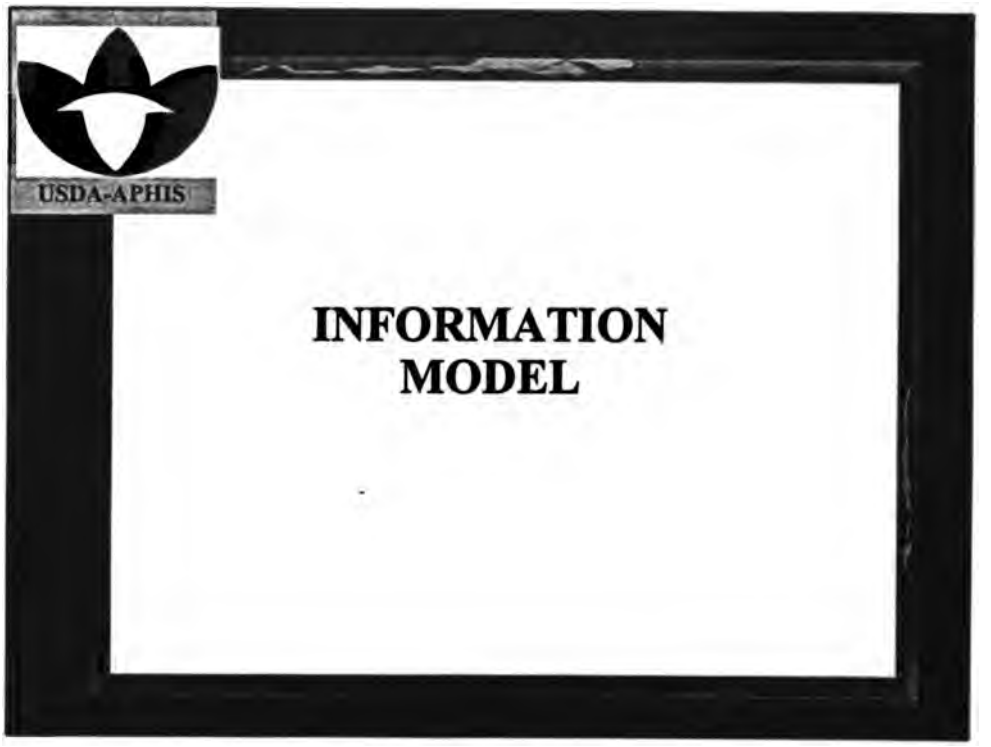
DATA USAGE ANALYSIS

DATA CLASS USED	PROCESS	DATA CLASS CREATE

DATA CLASS USED	PROCESS	DATA CLASS CREATE

DATA CLASS USED	PROCESS	DATA CLASS CREATE

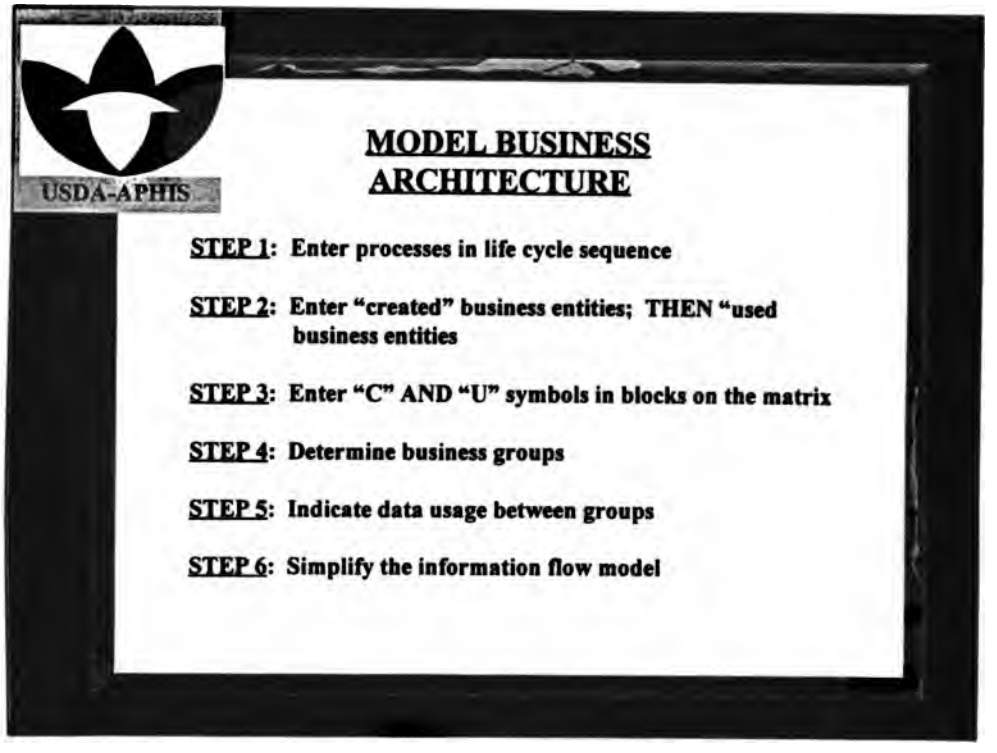
DATA CLASS USED	PROCESS	DATA CLASS CREATE



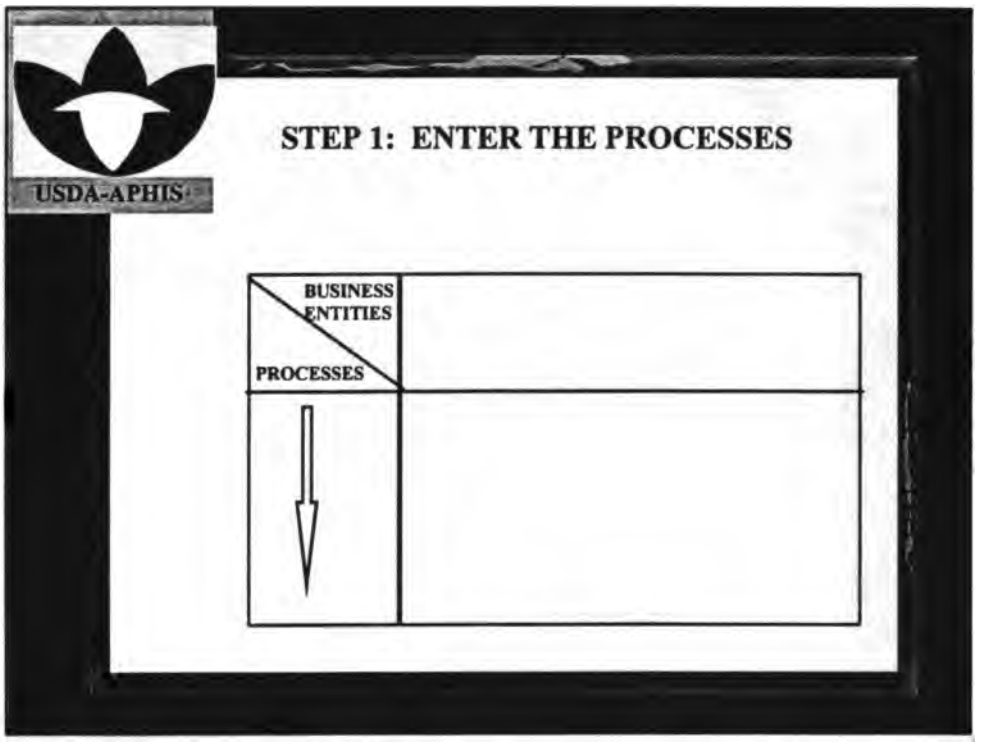
Notes:

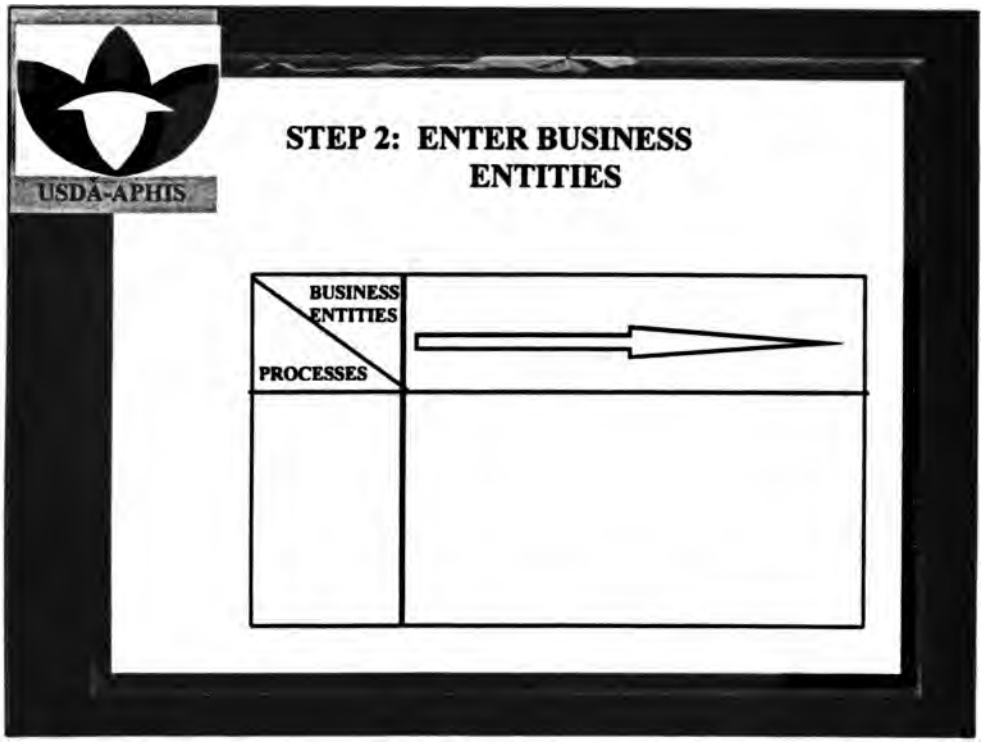
USDA-APHIS
DEFINE BUSINESS ARCHITECTURE
BUSINESS ARCHITECTURE: A graphical representation of the organization's information needs. It shows the relationships between processes, sub-processes, data classes and business entities.

Notes:

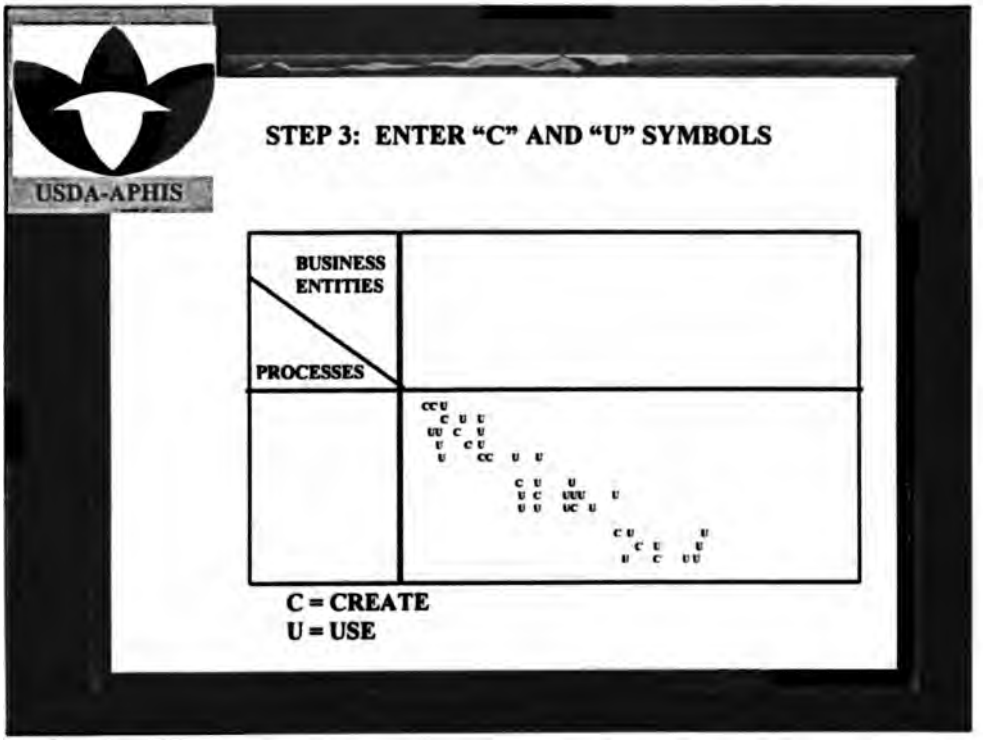

USDA-APHIS
MODEL BUSINESS ARCHITECTURE
STEP 1: Enter processes in life cycle sequence
STEP 2: Enter "created" business entities; THEN "used business entities
STEP 3: Enter "C" AND "U" symbols in blocks on the matrix
STEP 4: Determine business groups
STEP 5: Indicate data usage between groups
STEP 6: Simplify the information flow model

Notes:

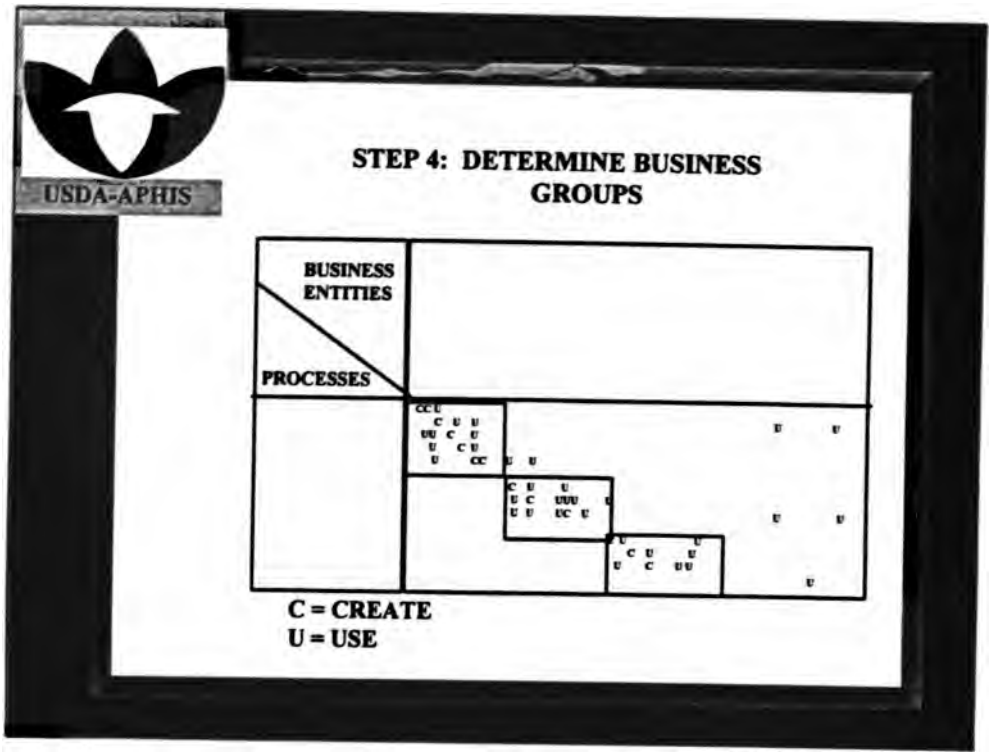

USDA-APHIS
STEP 1: ENTER THE PROCESSES
BUSINESS ENTITIES
PROCESSES


USDA-APHIS
STEP 2: ENTER BUSINESS ENTITIES
BUSINESS ENTITIES
PROCESSES

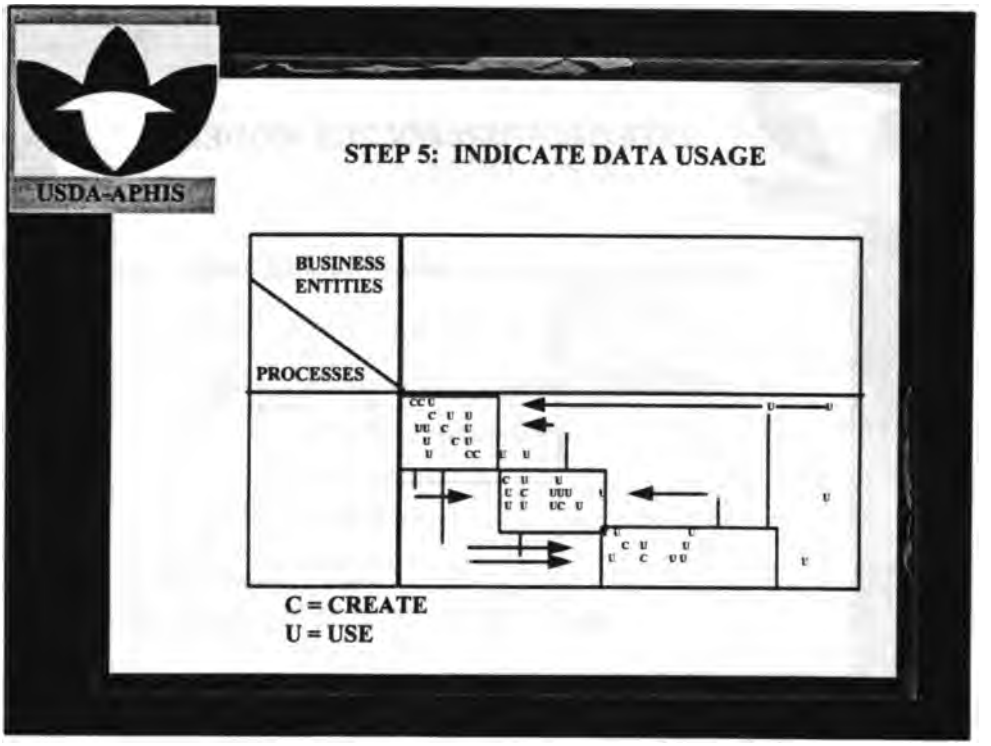
Notes:


USDA-APHIS
STEP 3: ENTER "C" AND "U" SYMBOLS
BUSINESS ENTITIES
PROCESSES
C = CREATE
U = USE

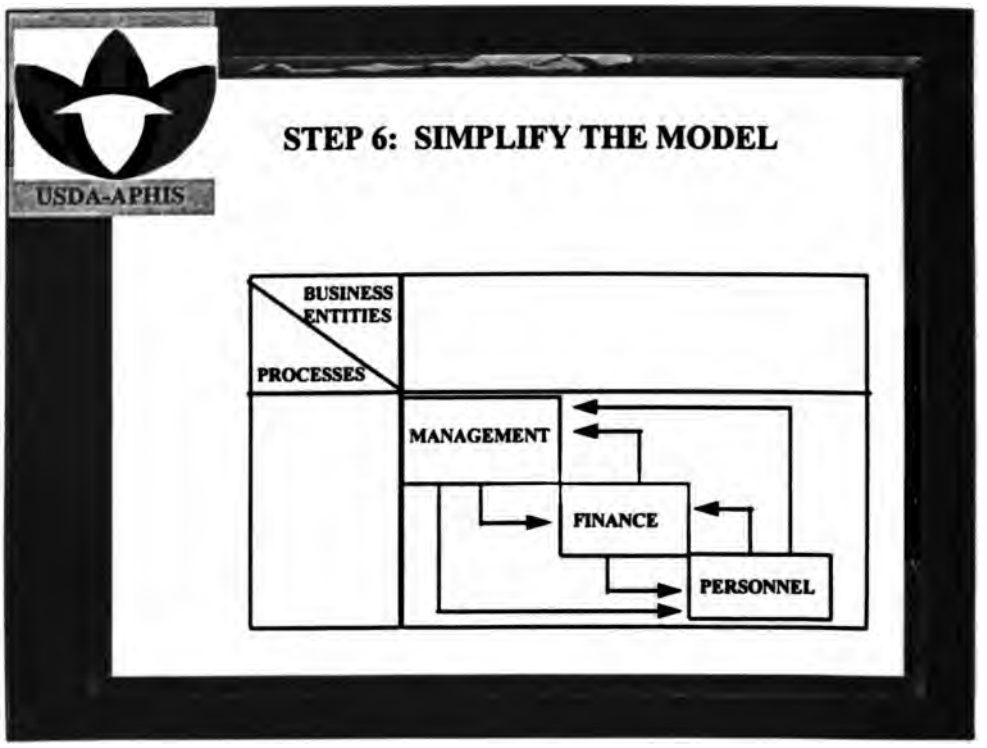
Notes:


USDA-APHIS
STEP 4: DETERMINE BUSINESS GROUPS
BUSINESS ENTITIES
PROCESSES
C = CREATE
U = USE

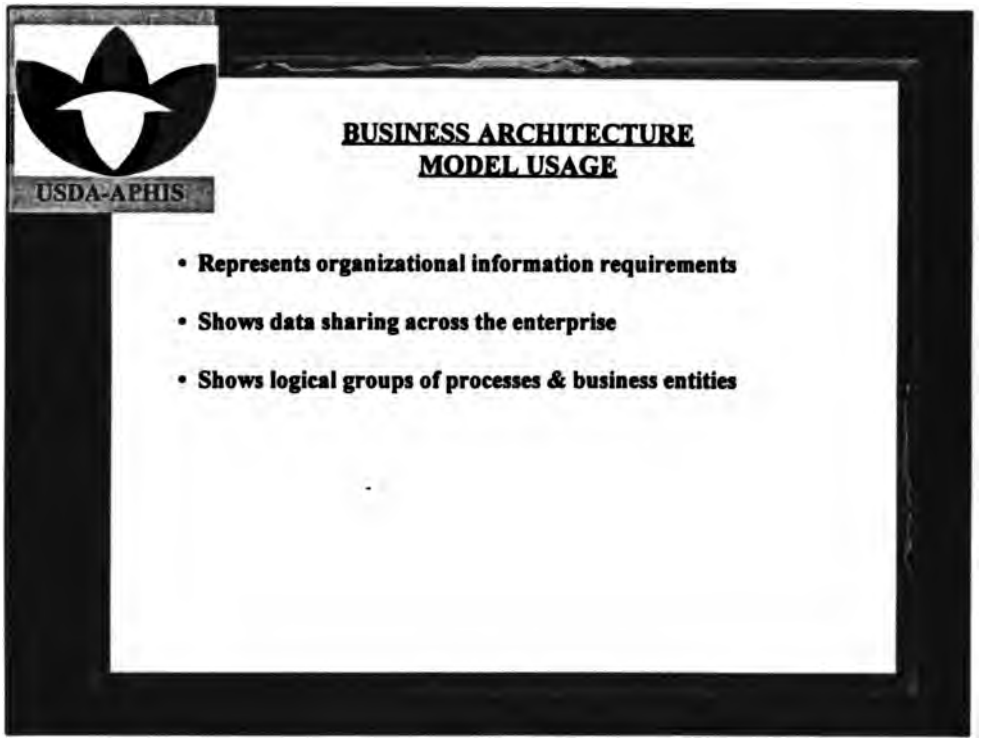
Notes:


USDA-APHIS
STEP 5: INDICATE DATA USAGE
BUSINESS ENTITIES
PROCESSES
C = CREATE
U = USE

Notes:

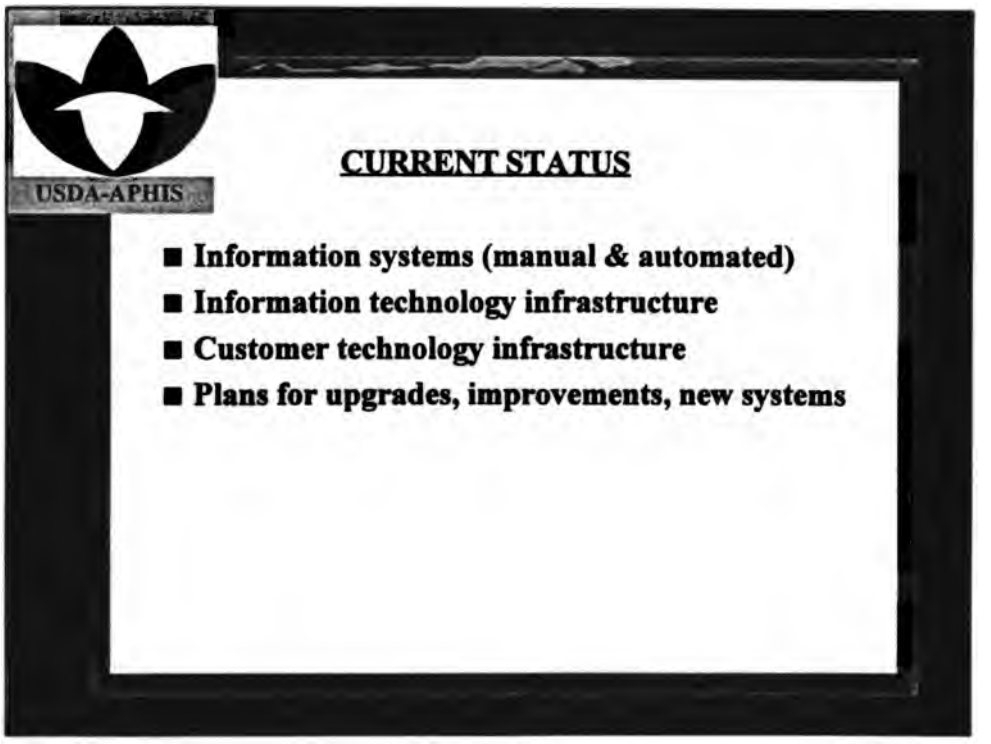

USDA-APHIS
STEP 6: SIMPLIFY THE MODEL
BUSINESS ENTITIES
PROCESSES
MANAGEMENT
FINANCE
PERSONNEL

Notes:

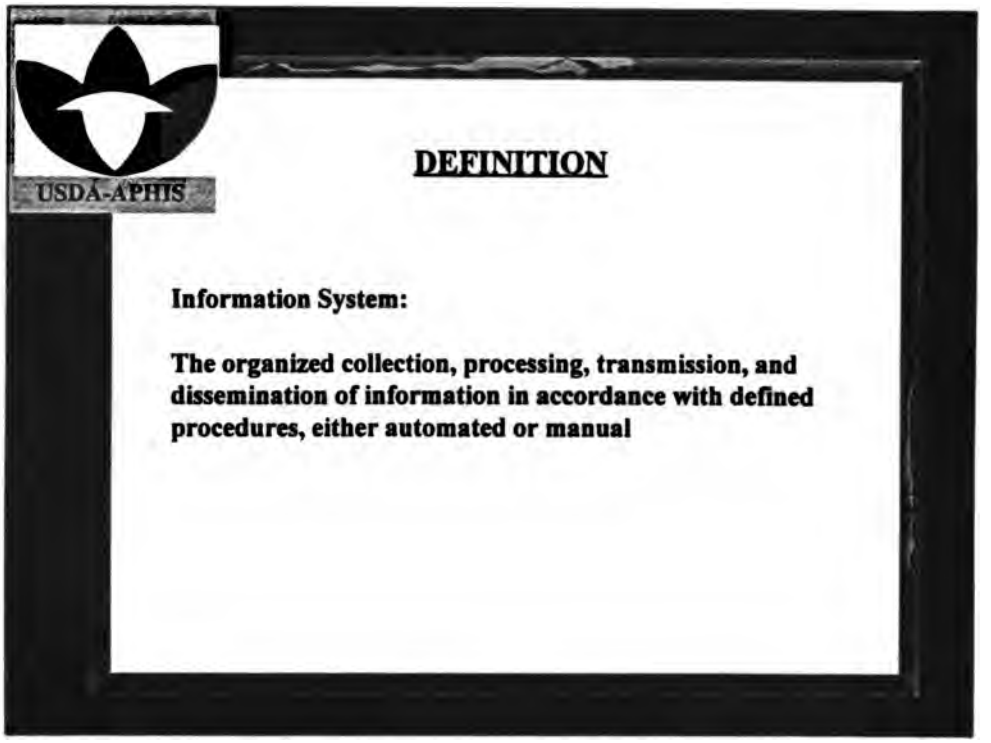

USDA-APHIS
BUSINESS ARCHITECTURE
MODEL USAGE
• Represents organizational information requirements
• Shows data sharing across the enterprise
• Shows logical groups of processes & business entities

Notes:

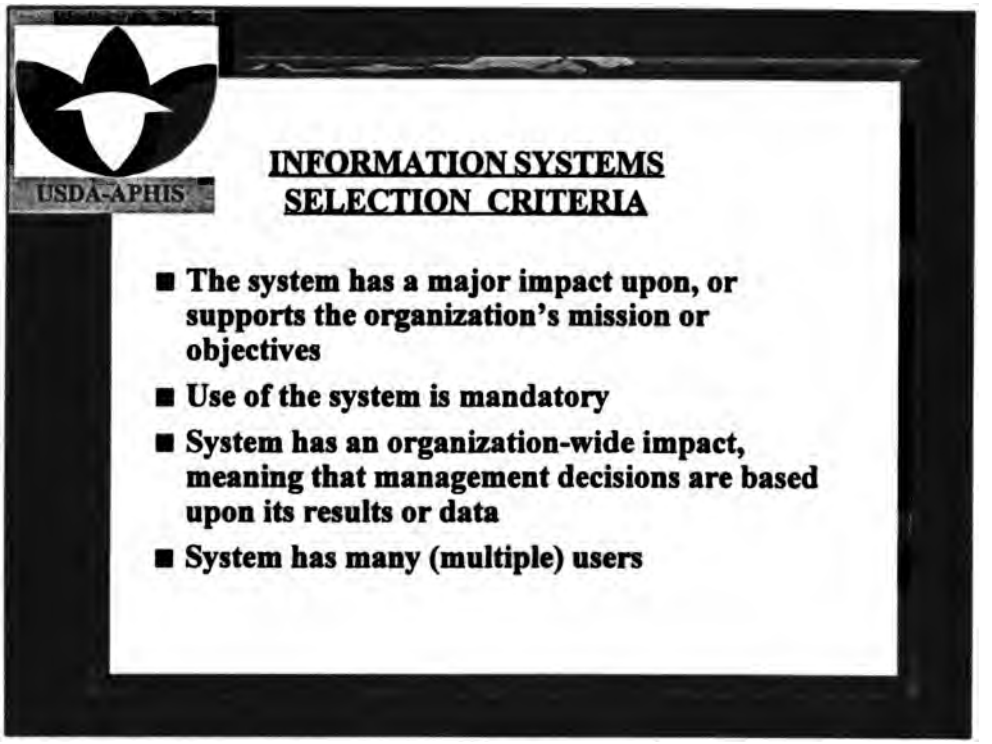
Notes:


USDA-APHIS
CURRENT STATUS
Information systems (manual & automated)
Information technology infrastructure
Customer technology infrastructure
Plans for upgrades, improvements, new systems

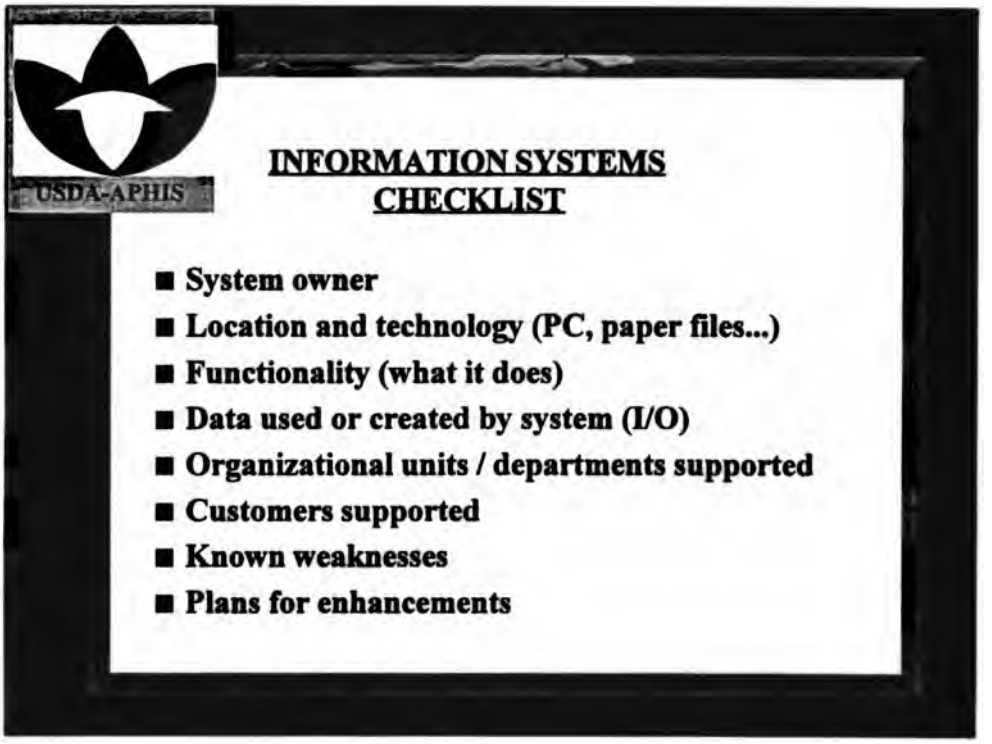
Notes:


USDA-APHIS
DEFINITION
Information System:
The organized collection, processing, transmission, and dissemination of information in accordance with defined procedures, either automated or manual

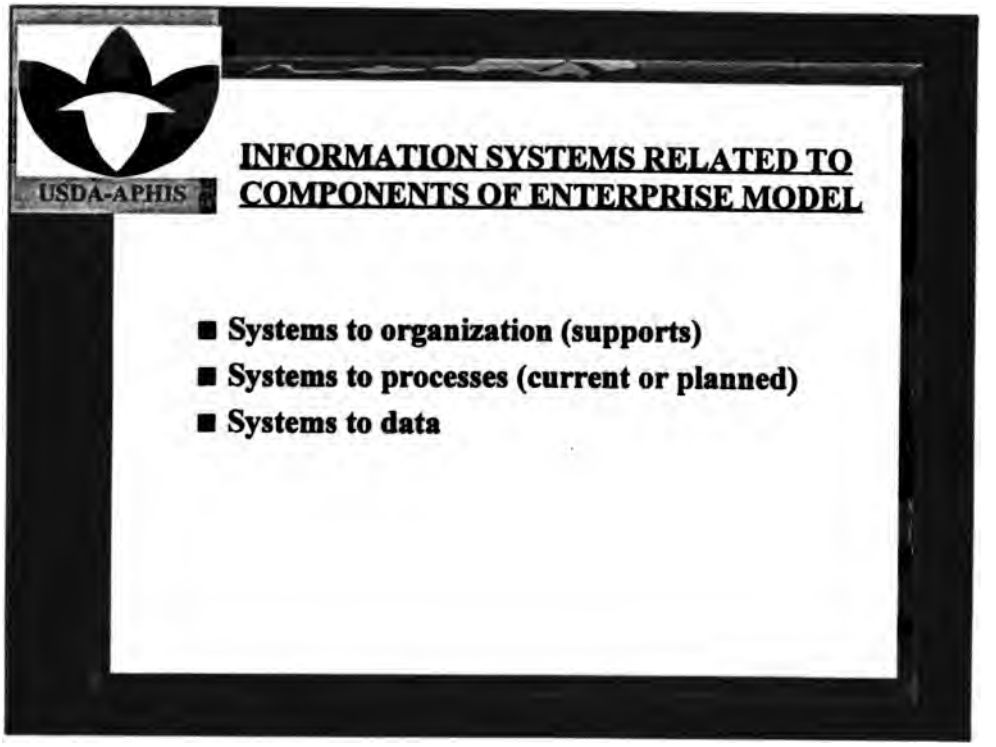
Notes:


USDA-APHIS
INFORMATION SYSTEMS
SELECTION CRITERIA
■ The system has a major impact upon, or supports the organization's mission or objectives
■ Use of the system is mandatory
■ System has an organization-wide impact, meaning that management decisions are based upon its results or data
■ System has many (multiple) users

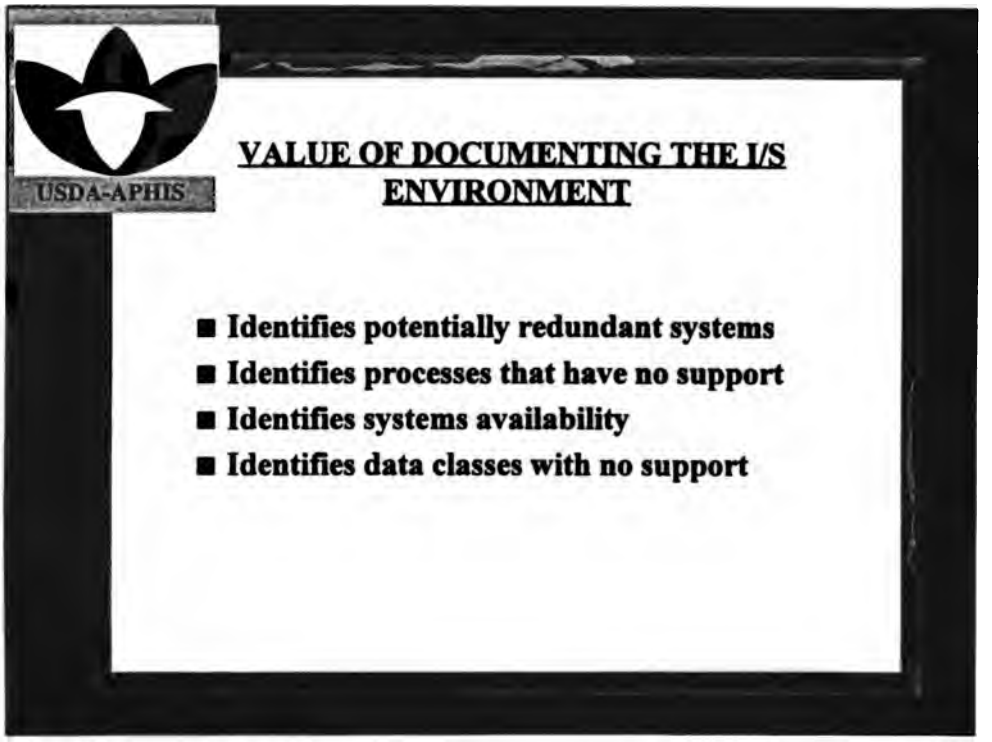
Notes:


USDA-APHIS
INFORMATION SYSTEMS
CHECKLIST
System owner
Location and technology (PC, paper files...)
Functionality (what it does)
Data used or created by system (I/O)
Organizational units / departments supported
Customers supported
Known weaknesses
Plans for enhancements

Notes:

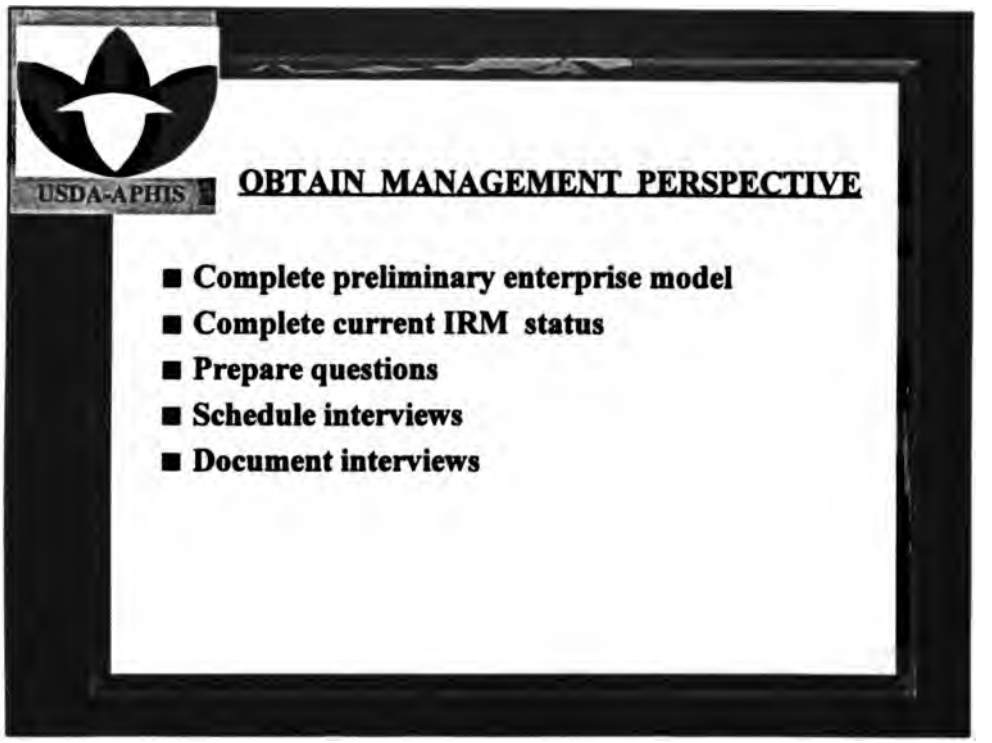

USDA-APHIS
INFORMATION SYSTEMS RELATED TO COMPONENTS OF ENTERPRISE MODEL
Systems to organization (supports)
Systems to processes (current or planned)
Systems to data

Notes:

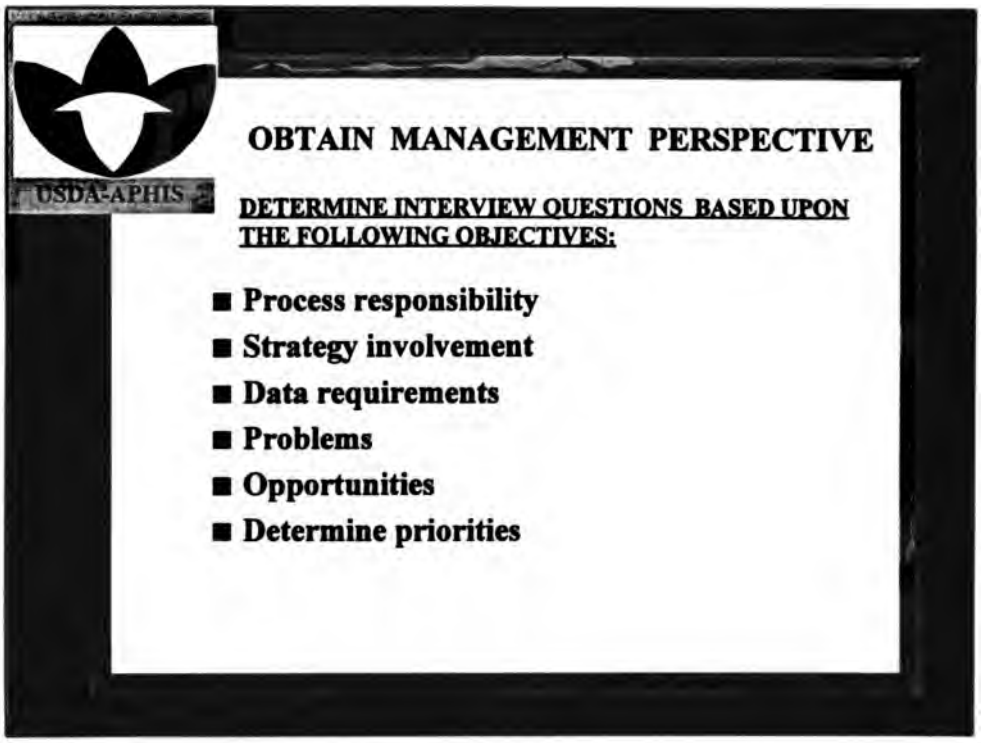

USDA-APHIS
VALUE OF DOCUMENTING THE I/S ENVIRONMENT
■ Identifies potentially redundant systems
■ Identifies processes that have no support
■ Identifies systems availability
■ Identifies data classes with no support

Notes:

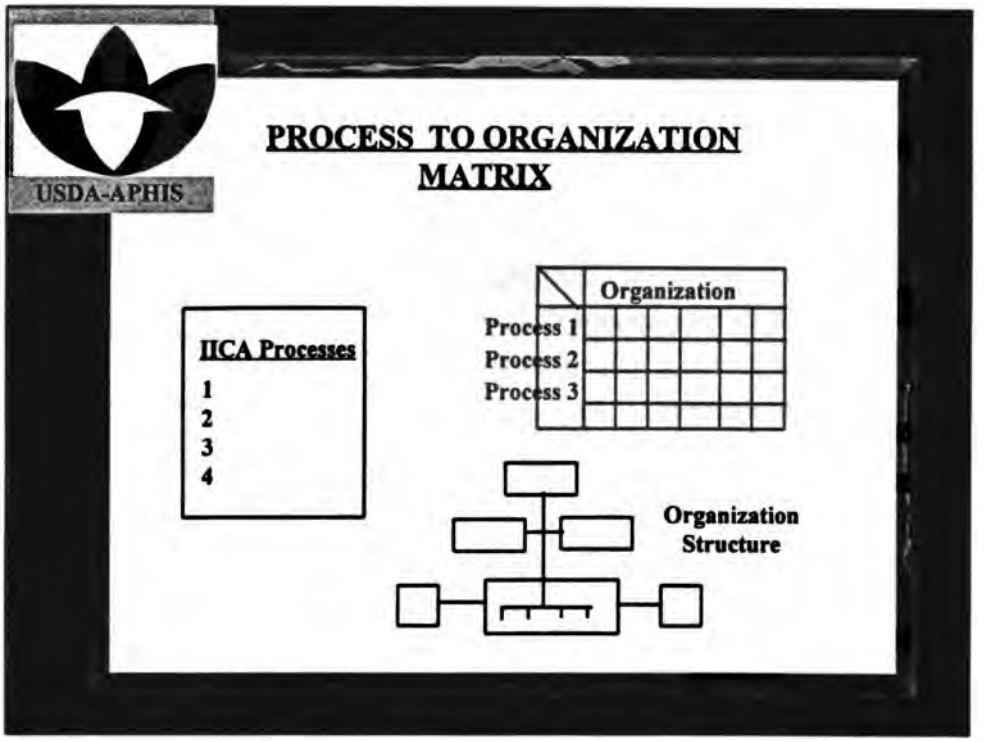
Notes:


USDA-APHIS
OBTAIN MANAGEMENT PERSPECTIVE
■ Complete preliminary enterprise model
■ Complete current IRM status
■ Prepare questions
■ Schedule interviews
■ Document interviews

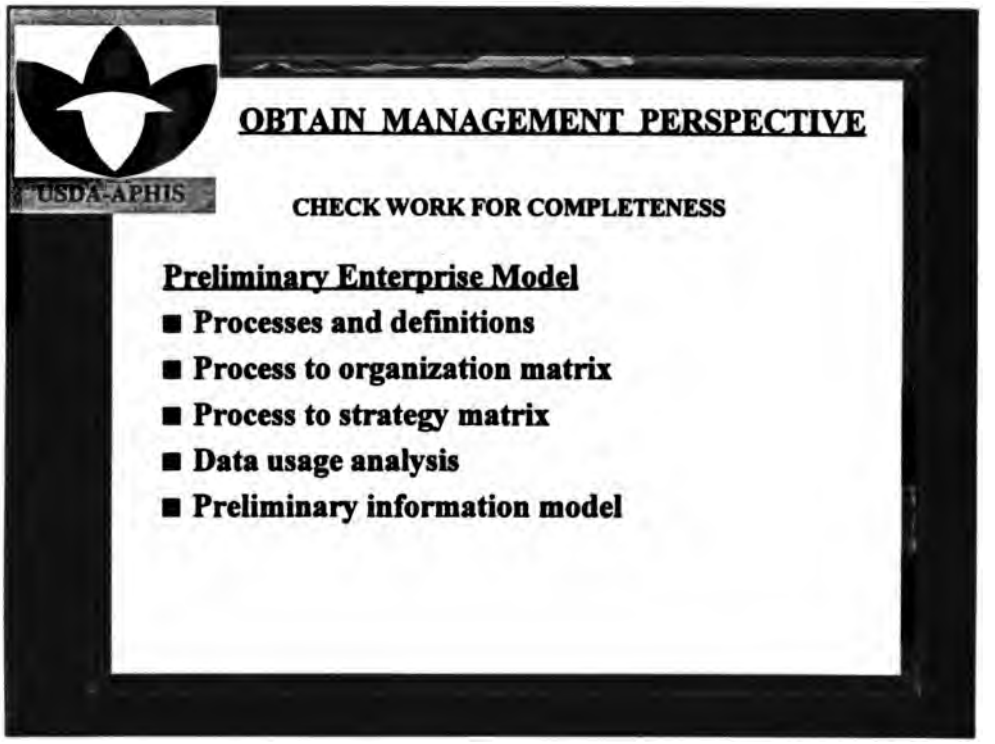
Notes:


USDA-APHIS
OBTAIN MANAGEMENT PERSPECTIVE
DETERMINE INTERVIEW QUESTIONS BASED UPON THE FOLLOWING OBJECTIVES:
Process responsibility
Strategy involvement
Data requirements
Problems
Opportunities
Determine priorities

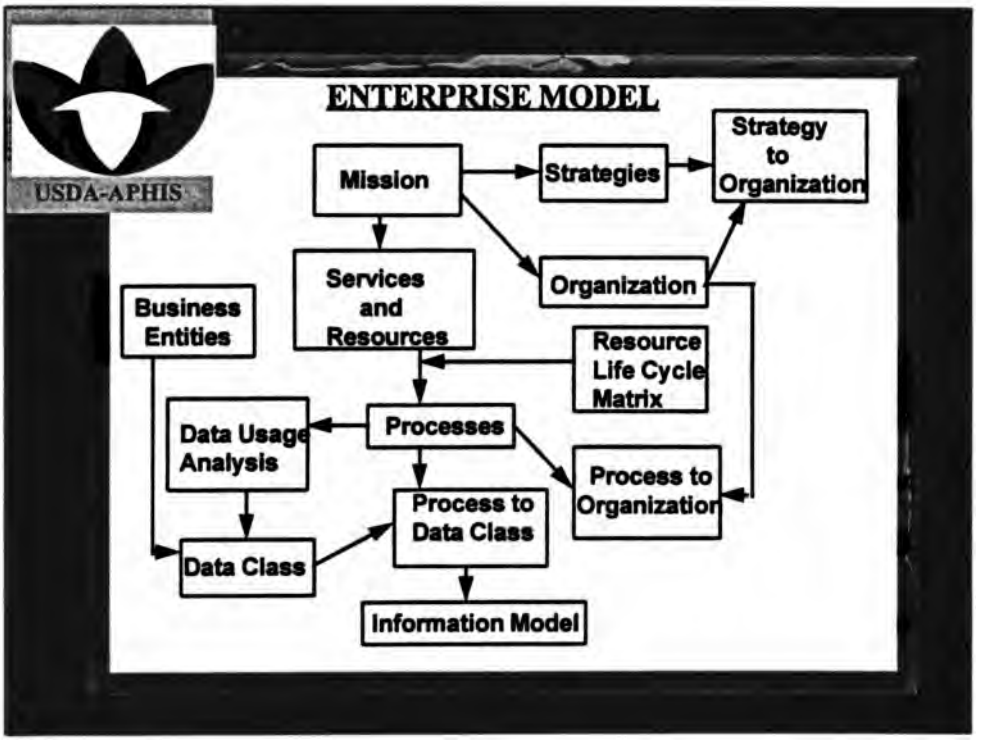
Notes:


USDA-APHIS
PROCESS TO ORGANIZATION MATRIX
IICA Processes
1
2
3
4
Organization
Process 1
Process 2
Process 3
Organization Structure

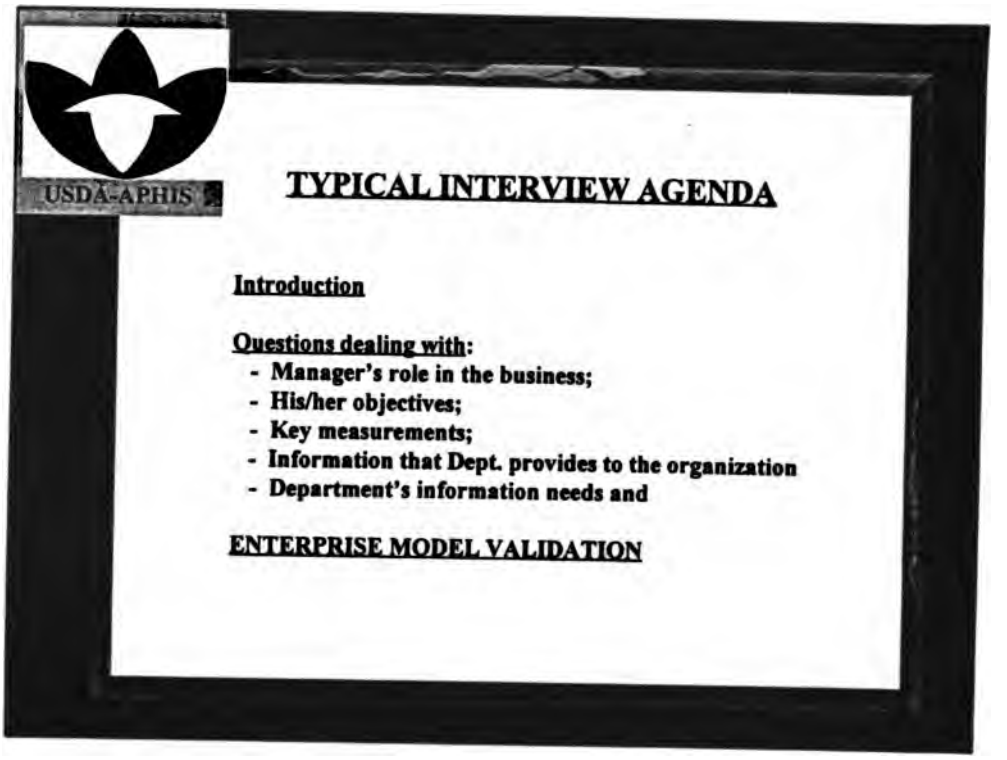
Notes:


USDA-APHIS
OBTAIN MANAGEMENT PERSPECTIVE
CHECK WORK FOR COMPLETENESS
Preliminary Enterprise Model
■ Processes and definitions
■ Process to organization matrix
■ Process to strategy matrix
■ Data usage analysis
■ Preliminary information model

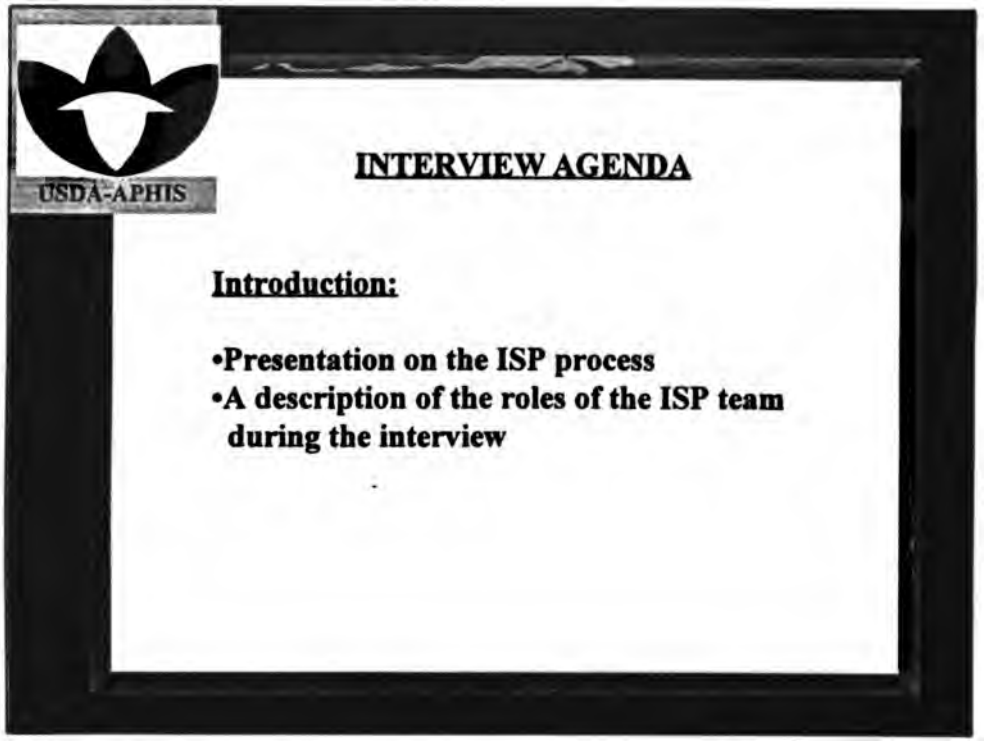
Notes:


USDA-APHIS
ENTERPRISE MODEL
Mission
Strategies
Strategy to Organization
Services and Resources
Organization
Business Entities
Resource Life Cycle Matrix
Data Usage Analysis
Processes
Process to Organization
Process to Data Class
Data Class
Information Model

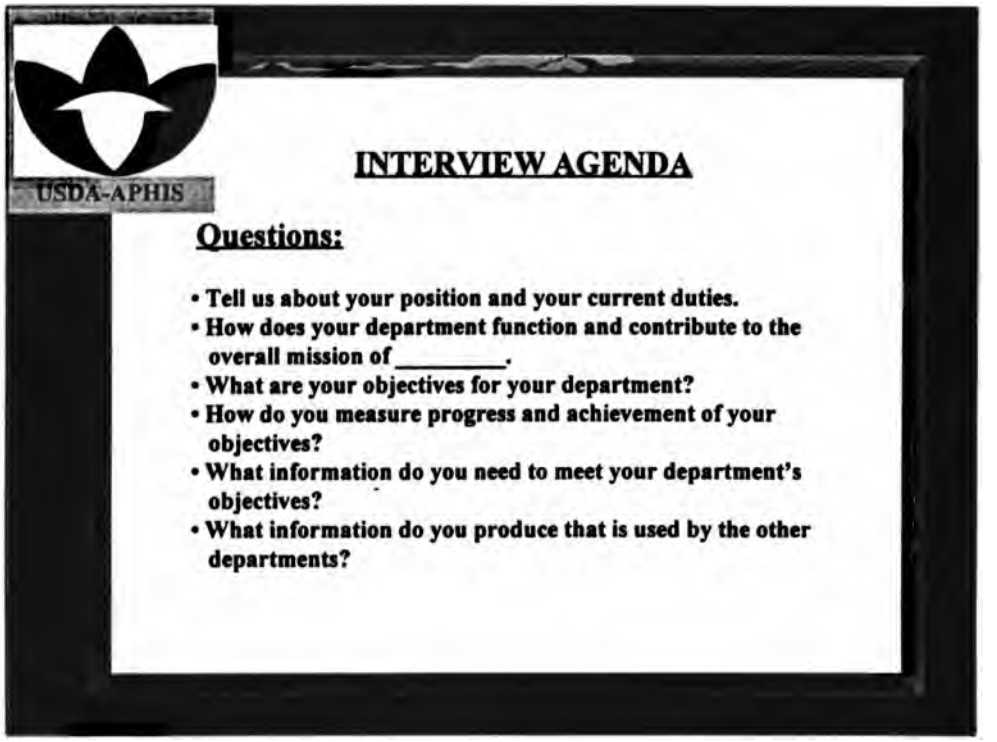
Notes:


USDA-APHIS
TYPICAL INTERVIEW AGENDA
Introduction
Questions dealing with:
- Manager's role in the business;
- His/her objectives;
- Key measurements;
- Information that Dept. provides to the organization
- Department's information needs and
ENTERPRISE MODEL VALIDATION

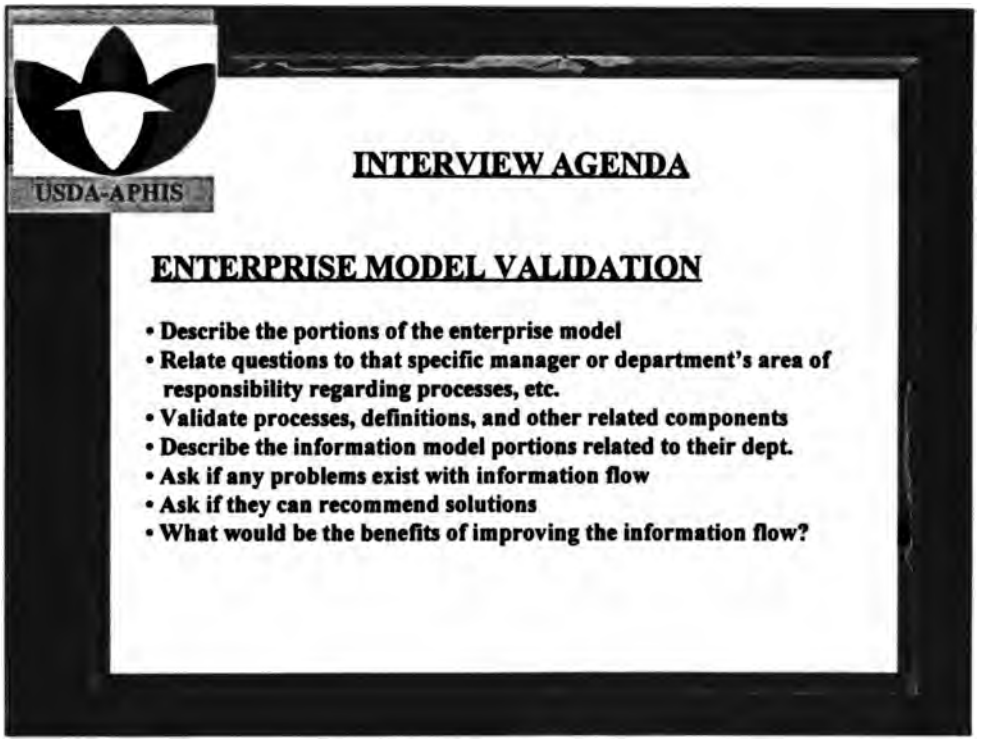
Notes:


USDA-APHIS
INTERVIEW AGENDA
Introduction:
•Presentation on the ISP process
•A description of the roles of the ISP team during the interview

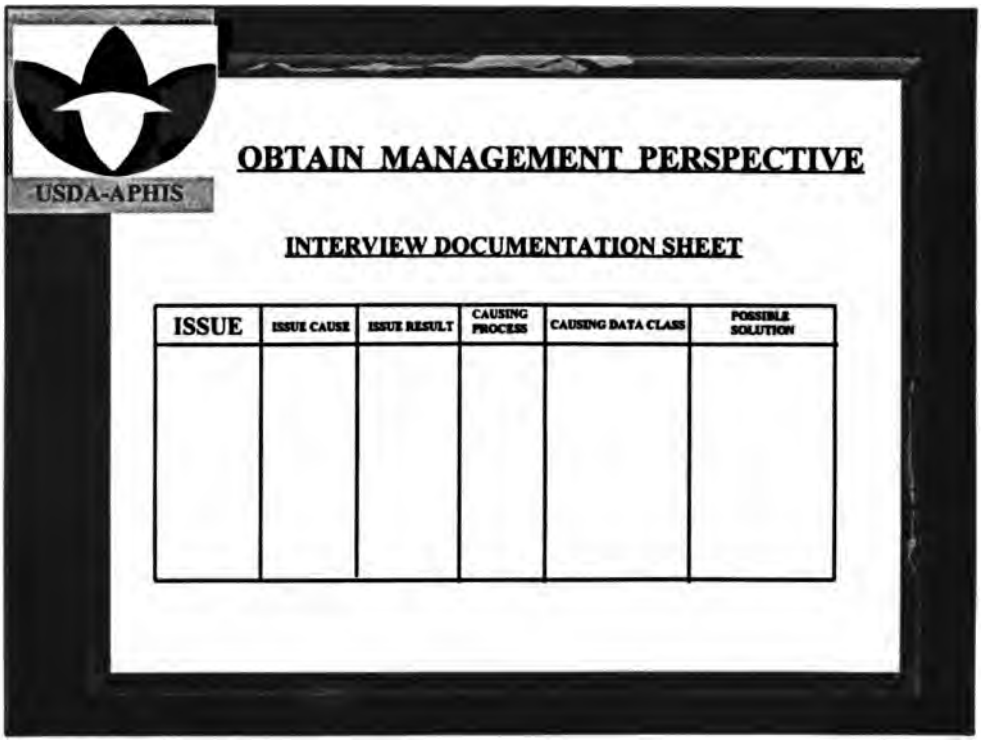
Notes:

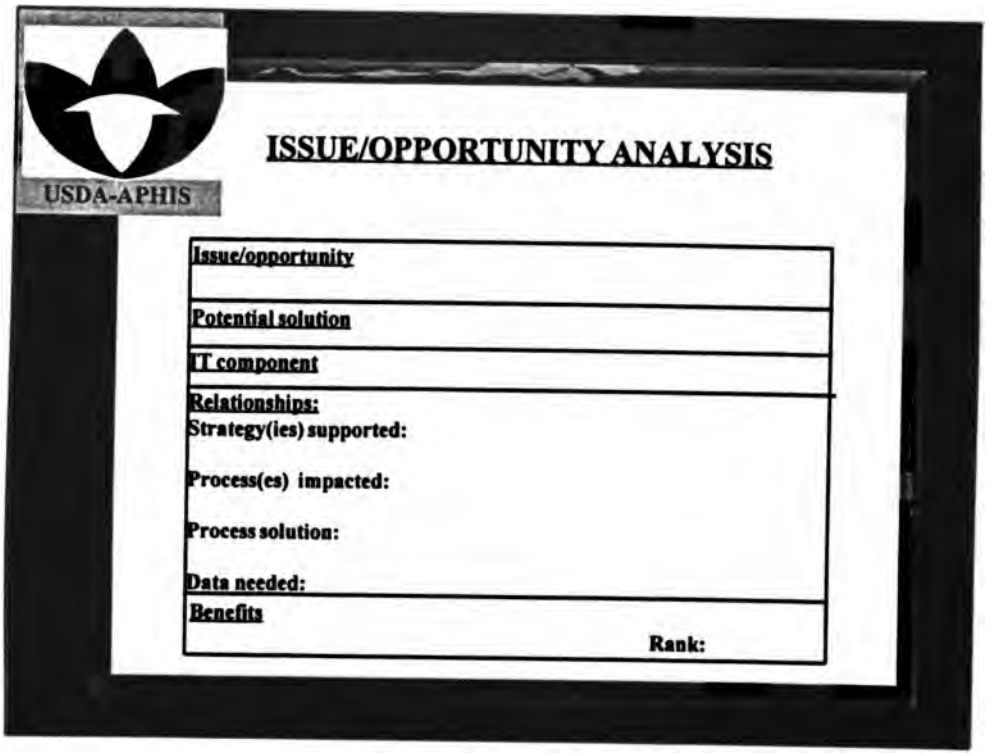

USDA-APHIS
INTERVIEW AGENDA
Questions:
• Tell us about your position and your current duties.
• How does your department function and contribute to the overall mission of _____.
• What are your objectives for your department?
• How do you measure progress and achievement of your objectives?
• What information do you need to meet your department's objectives?
• What information do you produce that is used by the other departments?

Notes:

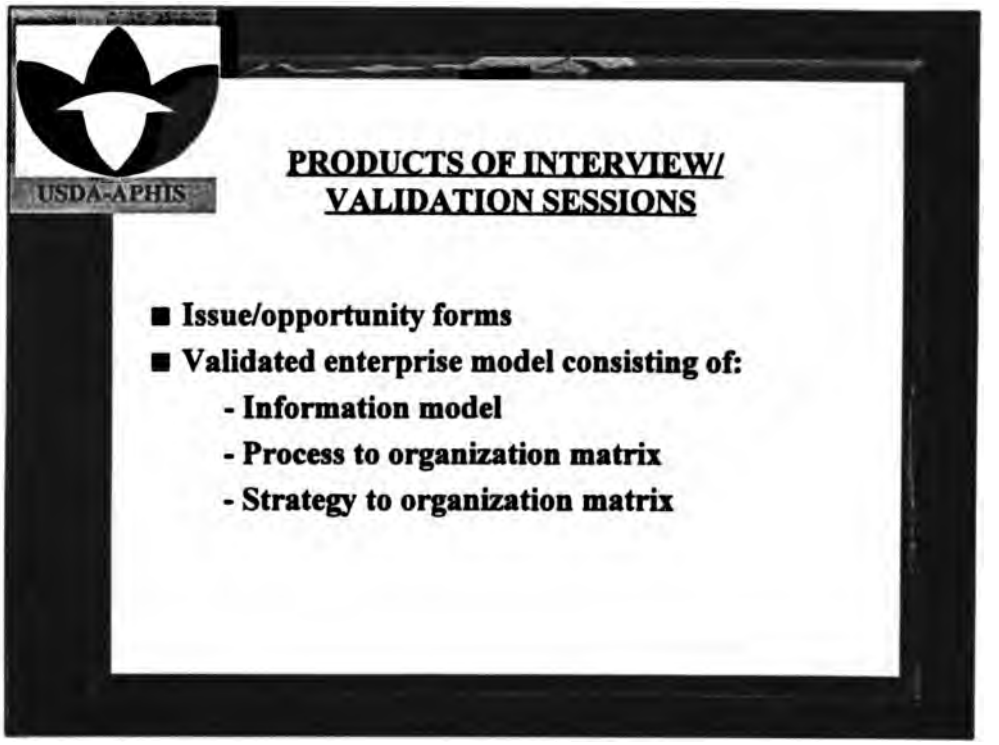

USDA-APHIS
INTERVIEW AGENDA
ENTERPRISE MODEL VALIDATION
• Describe the portions of the enterprise model
• Relate questions to that specific manager or department's area of responsibility regarding processes, etc.
• Validate processes, definitions, and other related components
• Describe the information model portions related to their dept.
• Ask if any problems exist with information flow
• Ask if they can recommend solutions
• What would be the benefits of improving the information flow?

Notes:


USDA-APHIS
OBTAIN MANAGEMENT PERSPECTIVE
INTERVIEW DOCUMENTATION SHEET
ISSUE
ISSUE CAUSE
ISSUE RESULT
CAUSING PROCESS
CAUSING DATA CLASS
POSSIBLE SOLUTION


USDA-APHIS
ISSUE/OPPORTUNITY ANALYSIS
Issue/opportunity
Potential solution
IT component
Relationships:
Strategy(ies) supported:
Process(es) impacted:
Process solution:
Data needed:
Benefits
Rank:

Notes:

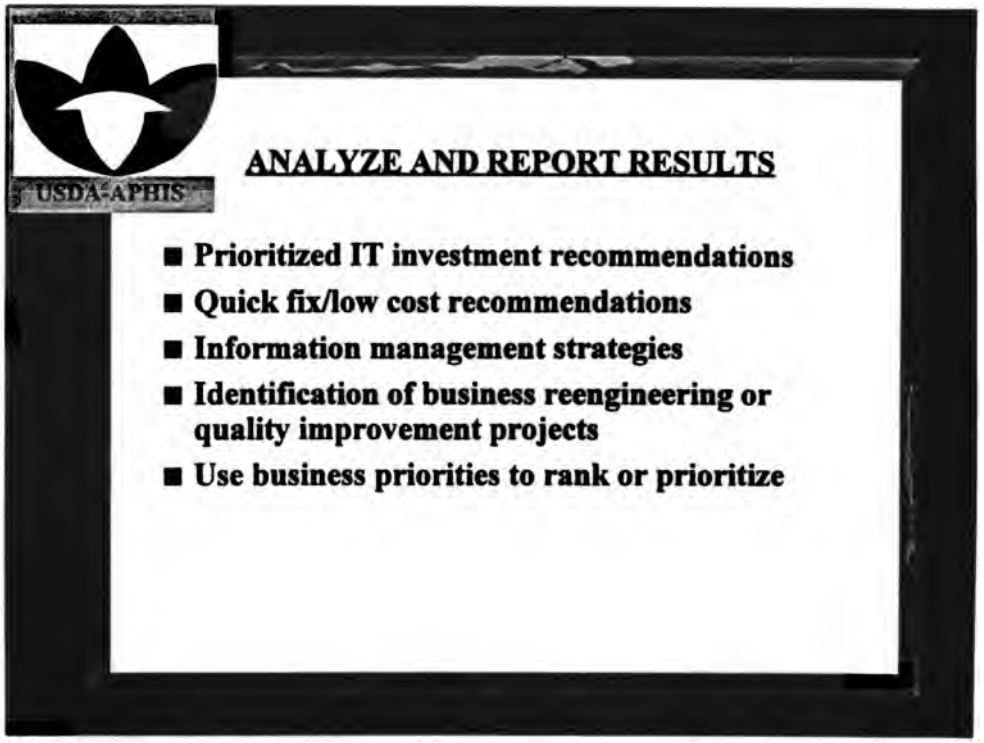

USDA-APHIS
PRODUCTS OF INTERVIEW/
VALIDATION SESSIONS
■ Issue/opportunity forms
■ Validated enterprise model consisting of:
- Information model
- Process to organization matrix
- Strategy to organization matrix

Notes:

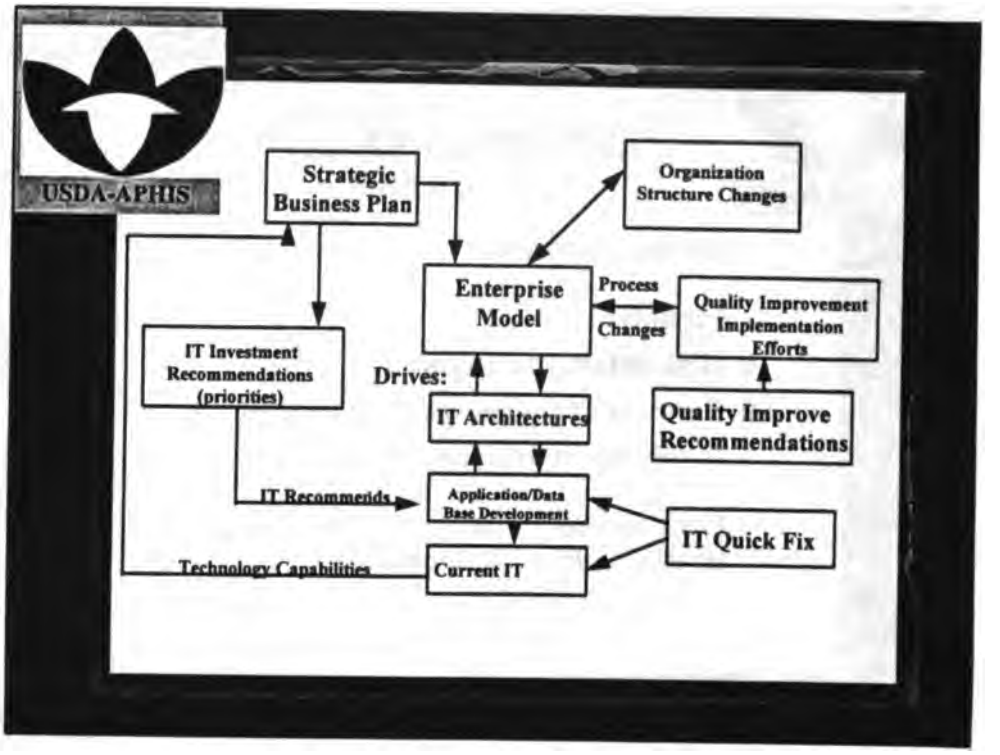
Notes:

USDA-APHIS
ANALYZE AND REPORT RESULTS
Validated models
Interview session documentation
Include issue/opportunity analyses
Rank or prioritize based upon business strategies and other criteria

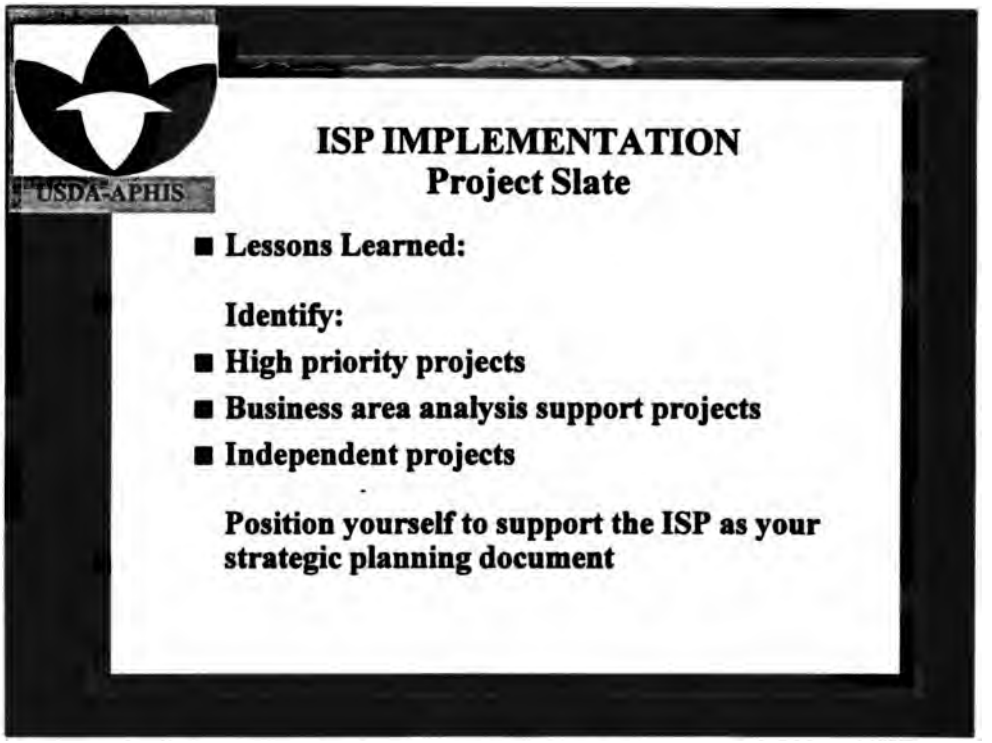
Notes:


USDA-APHIS
ANALYZE AND REPORT RESULTS
■ Prioritized IT investment recommendations
■ Quick fix/low cost recommendations
■ Information management strategies
■ Identification of business reengineering or quality improvement projects
■ Use business priorities to rank or prioritize

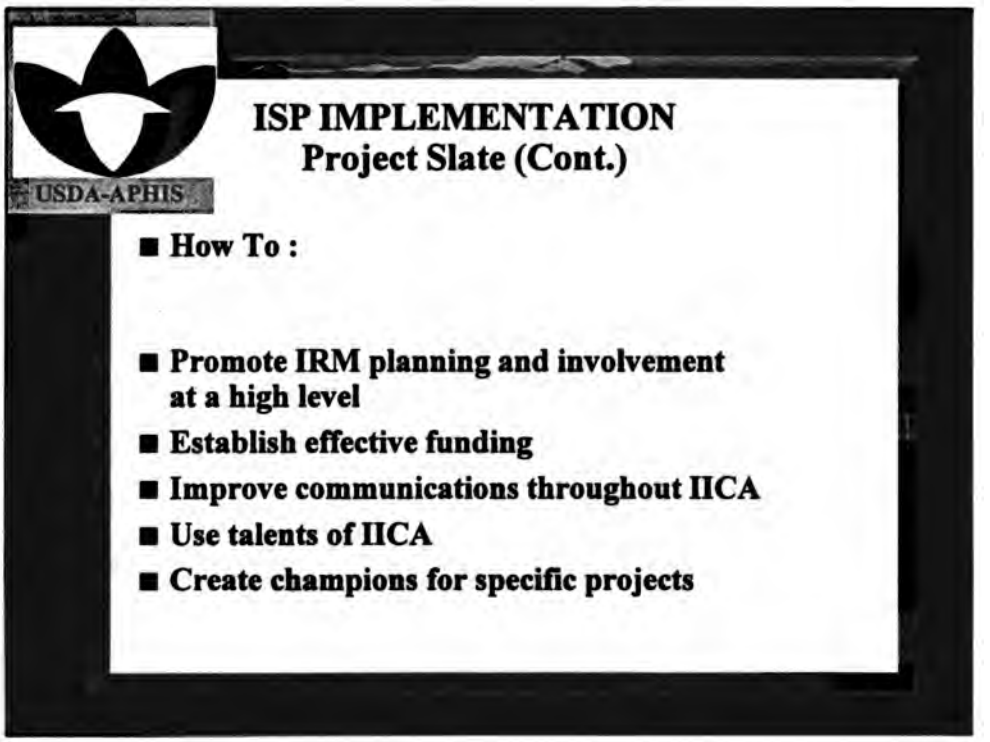
Notes:


USDA-APHIS
Strategic Business Plan
Organization Structure Changes
Enterprise Model
Process
Changes
Quality Improvement Implementation Efforts
IT Investment Recommendations (priorities)
Drives:
IT Architectures
Quality Improve Recommendations
IT Recommends
Application/Data Base Development
IT Quick Fix
Technology Capabilities
Current IT

Notes:

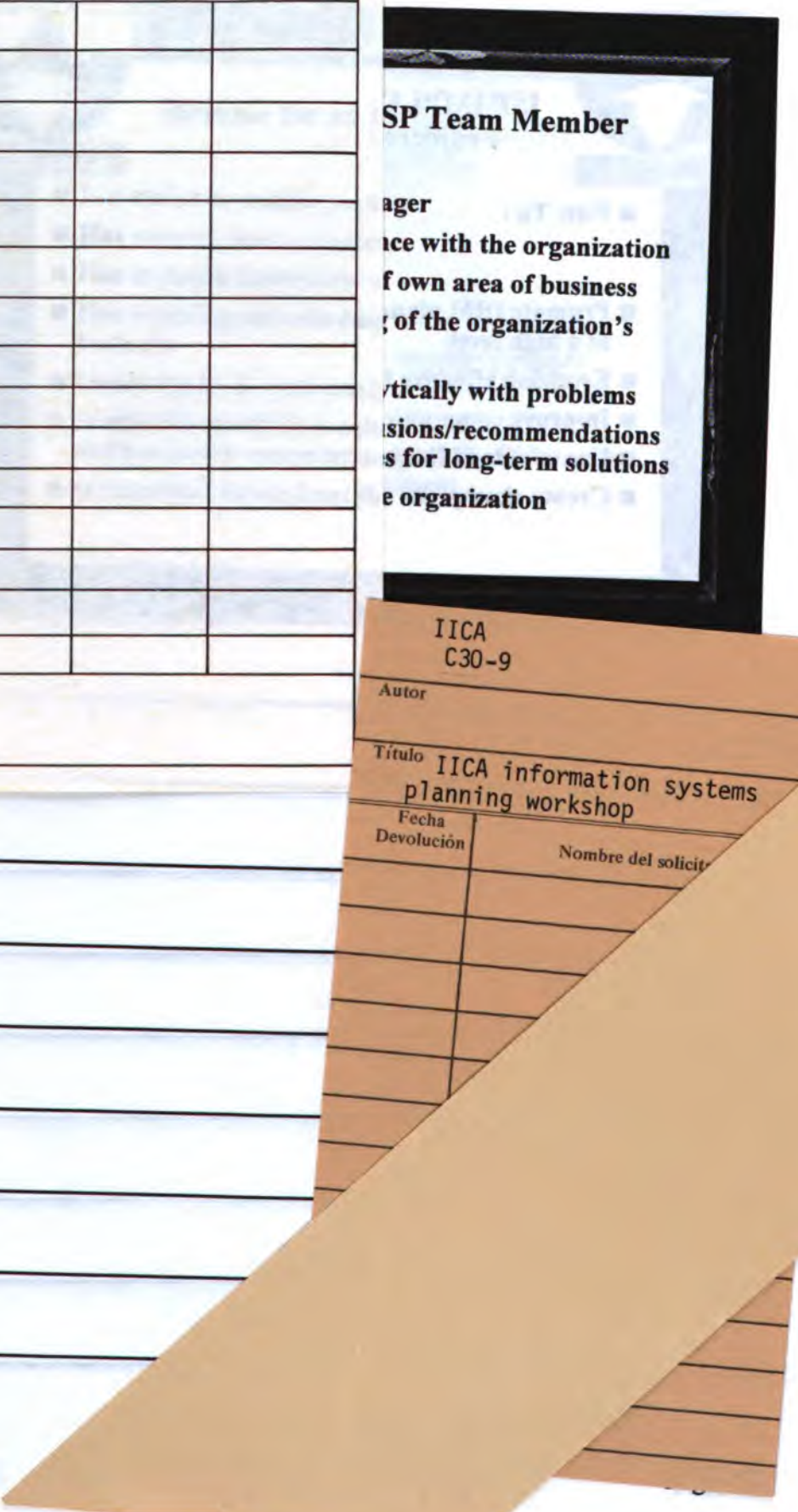
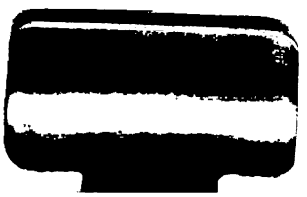

USDA-APHIS
ISP IMPLEMENTATION
Project Slate
■ Lessons Learned:
Identify:
■ High priority projects
■ Business area analysis support projects
■ Independent projects
Position yourself to support the ISP as your strategic planning document

Notes:


USDA-APHIS
ISP IMPLEMENTATION
Project Slate (Cont.)
How To :
Promote IRM planning and involvement at a high level
Establish effective funding
Improve communications throughout IICA
Use talents of IICA
Create champions for specific projects

Notes:

FECHA DE DEVOLUCION			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