2020-02-21 Call Note - Reference Models

Agenda

1. Roll Call (by timezone - East to West)
2. Scribe Shout-out - It's easy to scribe: How To Scribe Itana Calls Guide
3. Agenda Bash
4. **Main Topic - Reference Models**
5. Itana Org Updates (if any)
   a. Working Group Updates
      i. New2EA Working Group
      ii. API Working Group
      iii. Business Architecture Working Group
   b. Steering Committee Update
      i. Women in EA Working Group

Attendees

+ Louis King

Announcements - Itana News, Working Group Report out

Working Groups:

New2EA

- Check out itana wiki pages.

BA CoP

- Creating new capabilities in extension

Women in EA:

- Betsy Draper will co-lead a March activity.
- White paper developing between strategic and Itana.

Itana f2f proposal submitted to EDUCAUSE: Leading change as architect.

Winter wrap-up coming.

Mar 6. Book club report out: Back of the Napkin.

Possible coming topics in the Spring ..

- Student SIS Approaches
- AI and ML
- Learning from failure (May 1).

Topic Title: Demystifying Frameworks, Reference Models, and Taxonomies

Materials: Demystifying Frameworks, Reference Models, and Taxonomies

Overview & Cultural Fit

J.J. Du Chateau, U of Wisconsin Madison

Overview :There are differences between the following constructs but we don't get caught up on them

- Framework : Like a constitution … all the parts and how they fit together but not how they operate
- Arch framework: TOGAF
- Ref model: e.g. CAUDIT
- Taxonomy: hierarchy e.g. Zachman
- Tools ...

Robert Snyder, Penn State:

Cultural fit

- Having worked at establishing EA at Penn state for 3 years, have focused on Koteuv's belief: "Goal of EA practice is to support communication."
- Search for and collect useful tools that speak to your audiences. Refine and reuse them.
- Frameworks can help you think about your [EA] practice.

Use Cases

The University of Auckland - CAUDIT (Jeff Kennedy, The University of Auckland):

CAUDIT is a Business Reference Model (BRM).

Built up from business capabilities -- a thing that a business does or requires

Bus cap roadmapping has been our major focus.

Tells stories of where investments are going.

Maintain app portfolio in confluence wiki.

1200 systems, platforms, and services .. each mapped to a bus capability

3 viewpoints

Strategic priorities: begin by asking director (VP) about priorities over 3-5 years. Essentially strategy on a page

Then start talking about bus cap in gentle way.

Then, provoke biz leaders to think about what we could do with "digital futures"

Initiatives feed into strategic investment portfolio.

Questions:

JJ: how mature does an org need to be?

Jeff: see slide on capability health. Unpack all capabilities and see their maturity in current state.

Then decide whether it is differentiating, foundational, etc ... to help prioritize

Priorities and significant initiatives.

Help to identify when there are multiple departments trying to do same thing.

See process gaps slide.

Obsession with Robotic process automation … will need to address gaps when the initiative begins.

Oregon State University - CAUDIT (Melody Riley)

18 years with state of Oregon. Previously, CTO with state.

Now, with OSU, starting CRM practice to provide 360 view of student

Leveraging Salesforce CRM platform.

OSU -- CAUDIT model.

Inventoried where we use salesforce.

Lots of data silos, highly distributed

Looked for seamless experience for student

Turned out OSU was using salesforce mainly as dev platform rather than CRM

Used CAUDIT to understand bus, app, data (see slide)

Lots of distributed groups that don't work in coordinated fashion.

Lots of duplicate capabilities and tools.

Required a lot of footwork and interviews.

Nothing in place to give the 360 student view.

Started to form a CRM portfolio in April.

Questions:

Laurence: how do you guys handle the "licensing" (institutional investment) for caudit?

Melody: interim CIO had already started, so I just grabbed it?

Miami University - CAUDIT (Dana Miller)

Used CAUDIT model last year.

Delivery Team alignment recommendation,.

5 teams to value streams, associated with 2 biz cap types or core and enabling.

Rather than doing a top down reorg, cio wanted to do a design team.

Teams (Pi, east, sharks, ninjas, iterators) would be sliced through all layers of technology stack.

Used model to define product "student administration" that is composed of a lot of capabilities.

Could then identify opportunities to spread work out amongst multiple teams.

Talked to University of Canterbury re: effort to organize IT to support value streams per HEBRM.

Benefits

- Ability to respond to priorities of business
- Ensure IT kept relevant

Questions:

Louis: Everyone used CAUDIT model in different ways.

Jeff Kennedy: Don't think there is a requisite level of maturity needed to start using the model. Can start having business led conversations quite early. Frame the conversations and reflect back what they are doing.

Melody: People were shocked that people from IT would be talking about the business. Lots of interrelated dots outside of their functional area that they didn't realize.

Meenakshi, GW: Do you have a CoP to maintain these artifacts over time?

Melody: No, not yet at OSU. At the state, yes; worked across agencies.

Jeff kennedy: Small EA team, but we have a product owner network that we partner with. Some of them (~12) are starting to own their own capability maps.

AVAILABILITY OF CAUDIT MODEL:

CAUDIT is available under CC4 and will hopefully become available via InCommon.

In the meantime, can enter details in Itana Business Architecture Working Group spreadsheet.

Or email to Jeff directly.

Chat Record

Hi everyone I'm called in on the phone as well, in a really noisy place so not going to shout out during roll call.

From Betsy Draper to Everyone: (11:02 AM)

And apologies in advance, I need to drop off the call at half past the hour.

From jeff kennedy to Everyone: (11:04 AM)

...there's never anyone from mountain time!

From Louis King to Everyone: (11:05 AM)

Very rarely.

From jeff kennedy to Everyone: (11:07 AM)

+1 for Rupert!

From Jim, Piet, Rupert, Jacob (UW) to Everyone: (11:12 AM)

I would add that I think that reference models often define a taxonomy (of their parts) as part of the model itself.

From J.J. Du Chateau to Everyone: (11:13 AM)

Agreed. I feel that the CAUDIT BRM does that.
But would certainly like to here Jeff Kennedy's input on that.

From Jim, Piet, Rupert, Jacob (UW) to Everyone: (11:15 AM)

To this point: I brought the Zachman model into UW-Madison at one point and people said, "it is too complex". I had to look for something that worked with that audience.

From Jim, Piet, Rupert, Jacob (UW) to Everyone: (11:22 AM)

I'm jealous. Wonderfully mature.

From Riley, Melody A to Everyone: (11:24 AM)

Ditto...this is great!

From jeff kennedy to Everyone: (11:31 AM)

...i'm reminded of Betsy Draper's amazing work with the CAUDIT business reference model and CRM practitioners from all across KSU marking the model with push-pins.

From ROBERT SNYDER to Everyone: (11:31 AM)

Thank you Jeff. That was very helpful. How do the views you show work on the backend and what resources are "table stakes" for doing this (for example if your institution does not have a Configuration Management Database/Database of Assets, are you out of luck

From Jim, Piet, Rupert, Jacob (UW) to Everyone: (11:33 AM)

My favorite Gartner quote about CRMs is: You have to have a CRM culture and practice before you buy a tool.

From jeff kennedy to Everyone: (11:34 AM)

^we're in the process of becoming more data-driven around this, principally to make visual enterprise storytelling easier and more repeatable. much of the current approach is designed to have better conversations than we did in the past from an application-centric perspective (e.g. "what are your plans for upgrading Banner next year?"). the tooling is very light (we have a bespoke visualization tool and we use a bit of the Google Data Studio), and much of the value comes from being able to catalogue things (things like the application portfolio and the capital projects) using the CAUDIT model.

From ROBERT SNYDER to Everyone: (11:35 AM)

We just started a "tool free" assessment of our CRM Vision and strategy.
But only in the context of our Line of Business (Online Education)

From J.J. Du Chateau to Everyone: (11:36 AM)

Really like the idea that the BRM provides a complete overview of what a Higher Ed institution does.

From ROBERT SNYDER to Everyone: (11:40 AM)

Yes. The BRM is critical to balancing the IT. It enables us to get line of sight between what we are investing in and why. Without that we cannot really assess the success or return on investment of initiatives, and more so what our Technology Debt and Architecture debt is costing.

From ROBERT SNYDER to Everyone: (11:48 AM)

Melody, that is great that you brought you maturity to the role.
your EA maturity

From jeff kennedy to Everyone: (11:49 AM)

OSU is lucky to have Melody there!

From Ashish Pandit to Me: (Privately) (11:50 AM)

Need to drop off

From Louis King to Everyone: (11:50 AM)

Back to UW for sharing screen.

From Riley, Melody A to Everyone: (11:50 AM)

Awww...shucks. thanks! :-)

From ROBERT SNYDER to Everyone: (11:51 AM)

LOL
Thanks Jeff. I really like the laminated BRM and markers
Getting back to Business Intelligence from Information Technology.

From Piet Niederhausen (UWash) to Everyone: (11:55 AM)

While I agree that frameworks are a great way to support better communication, I would caution that they don't in and of themselves change the institution's decision-making model. Architects can get quite frustrated down the line when they find that the analysis their model provides is never executed by management.

From ROBERT SNYDER to Everyone: (11:55 AM)

We are also trying to do the same at Penn State with a CoP

From Piet Niederhausen (UWash) to Everyone: (11:56 AM)

So part of the job of enterprise architecture is to bring the model and tie it into decision-making processes that can make use of it.

From ROBERT SNYDER to Everyone: (11:57 AM)

Thanks Dana.