Peel Pilot Training Workshop – Preliminary Agenda

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| Topic | Lead | Start | Duration |
| 1) Introduction - what needs to be accomplished in the pilot | Roy |  | 15 min |
| 2) Tool familiarization - access and exercise SA and Quickr | Jim |  | 1 hr |
| 3) Model familiarization - walk through the SA contents | Skip |  | 30 min |
| 4) Overview of the pilot project steps | Roy |  | 30 min |
| 5) Role discussion - who will play what role during the pilot | Roy |  | 15 min |
| 6) Execution - walk through each step, discuss approach, attempt execution of some or all model manipulation | Skip |  | Available time |
| 7) Planning - discussion of requirements for completing the pilot project | Roy |  | 1 hr |
| 8) Wind up - gather preliminary thoughts about the tool and priorities for updating it during the pilot project. | Jim |  | 30 min |

Pilot Test Outline

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| STEP | NOTES |
| 1.      Load the Strategic Plan Vision, Mission, Goals, Objectives and Strategic Priorities into System Architect |  |
| 2.      Load the six Regional Programs (program fields) into System Architect – seven programs, if we include “Enabling Services” |  |
| 3.      Load the fifteen or so Regional Sub-programs into System Architect (Water, Wastewater, Solid Waste, etc.)  These are from the previous EMT discussions. |  |
| 4.      Load a full set of services, from our existing Service Inventory for at least the Transportation Program into system architect.  Ideally, I would also select load the services for one more Public Program and at least one sub-program under Enabling Services.  For the most part, I would just load the services as we have in the Service Inventory, without trying to further improve these to address known concerns.  Attempting the latter could involve us in endless debate and doesn’t really contribute to testing the capability of the software – which is what this is all about. |  |
| 5.      In loading the services, I suggest that we approach this in two different ways (to test different capabilities of the software and the model):   * For one program, we load our services from scratch, from our Service Inventory * For the second program, we “import” the services from the Reference Model and then edit these to match our Service Inventory.  This assumes that the Reference Model (all or substantial parts), will have been loaded into System Architect for use by the Peel Pilot. |  |
| 6.      For both #2 and #4, we will need to confirm the attributes to be loaded for our programs and services.  My expectation is that we will fully populate the meta-model attributes for at least some of the selected programs and services, but will not necessarily populate all attributes for all programs and services – e.g. we may provide performance measures and targets for only one or two programs/services. |  |
| 7.      As part of loading programs, we will want to incorporate a partial taxonomy of both target groups and needs, focusing on those relating to the specific programs that we will be loading. |  |
| 8.      In loading the services, we will want to link each service to one or more programs, providing the “Service Value” which connects the service to a program outcome (target group and need). |  |
| 9.      We will also want to load a portion of our organization structure (I suggest from CAO to Manager/Section), again the portions related to the selected programs and services.  We can then connect both the programs and the services to the responsible or accountable organizational units at the appropriate level. |  |
| 10.   Having loaded our Programs and Services, we will link these to the Strategic Plan Goals, Objectives and Priorities.  Each of the seven goals in the Strategic Plan can be aligned with one of the seven programs (this was quite deliberate).  Similarly, we can relate the Priorities first at the program level and then to one or more specific services. |  |
| 11.   Finally, having loaded the Strategic Plan elements, along with selected programs and services and organization units, we will want to identify a number of reports, spreadsheets and models (e.g. PLM, PSAM, SIAM) that that can usefully illustrate many of the relationships – and provide real value to potential users, including members of our Executive Management Team. |  |
| 12. We still need to translate the above steps into a “test script”, but this may requires more of a knowledge of System Architect and the meta-model - what are the steps within SA to accomplish each of the above.  We should also ensure that we are testing all elements of the solution – how will we use SA, SA/XT, reporting tools and the Quickr site. |  |