

Information Stewardship: The Road Taken

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Database Services & Architecture

Agenda

5 minutes introductions

10 minutes where are we trying to go?

🚧 Explain our customized terminology

10 minutes what is the best way to get there?

🚧 Describe all of the twists and turns in the road and identify our stewardship milestones

20 minutes do all roadblocks have a detour?

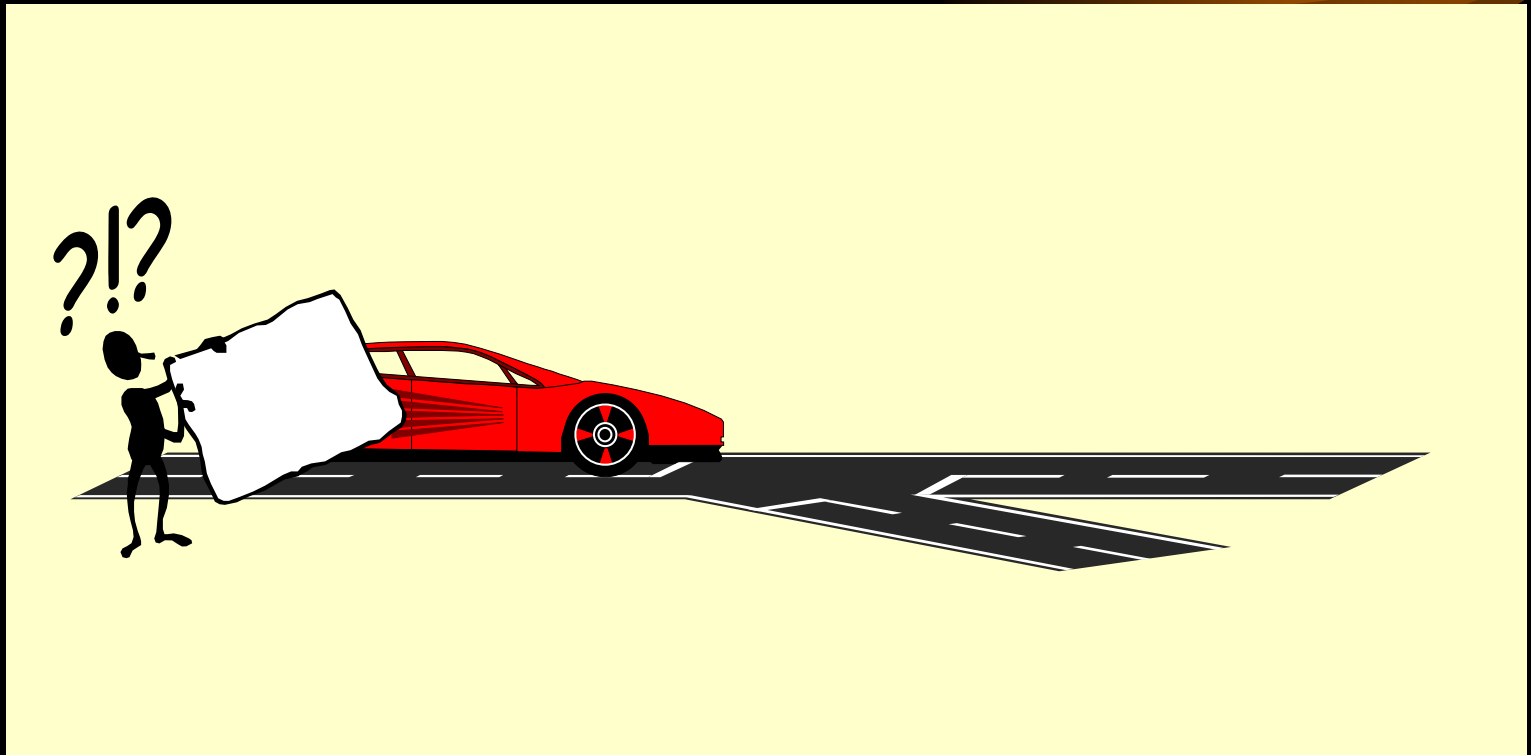
🚧 Provide an outline of our information stewardship policy

5 minutes can we give you any travel tips?

🚧 Identify resources

10 minutes Q&A (or SLACK!)

*Sometimes Not Having
Something Is Expensive...*



Sometimes Not Having Something Is Expensive...

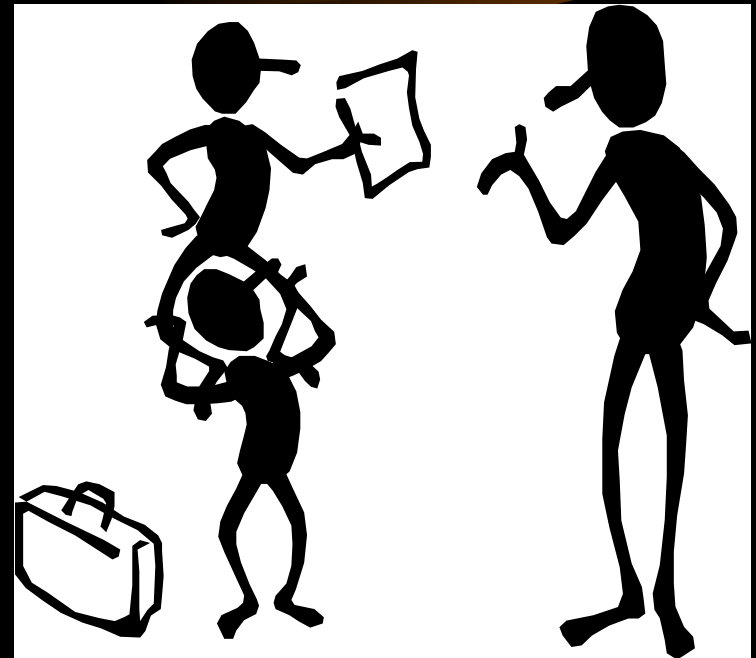
Lack of ownership and usage
information costs:

- Time researching who to contact
- Time communicating to impacted parties
- Time negotiating through politics and priorities

Example

The Issues

- Gaps in current maintenance process
- Uneven data quality
- Lack of data consistency
- Limitations to future products and services
- Inefficiency due to unassigned accountability
- Loss of productivity



Stewardship



Our stewardship policy provides

- ◇ Definitions of roles and key terms
- ◇ Documentation recommendations for responsibilities
- ◇ Consistent methods for handling conflict

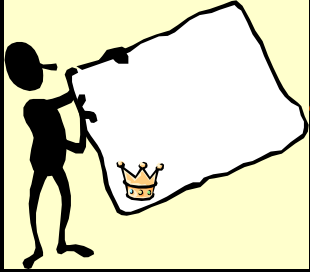
Terminology

Procedures and policies about stewardship *need* to be technical

But the directions should be simple

A picture is worth 1000 words!

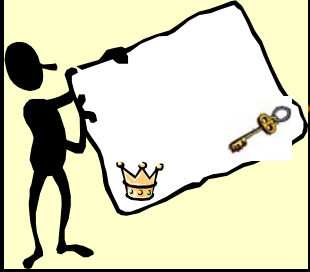
Terminology List	
1	Artifact The thing requiring stewardship (i.e., data, object, process, equipment, etc.)
Stewardship	
2	Artifact Type The category into which a thing requiring stewardship falls (i.e., data, object, process, equipment).
3	Attribute A piece of information, subordinate to an entity, that is used by the business.
4	Authoritative Source The person authorized by a steward or owner to take responsibility and make decisions in their absence.
5	Business Information Steward Accountable for validation of the definition of data, including specification of valid values and business rules.
6	Change Request The action that usually starts a stewardship mediation requirement.



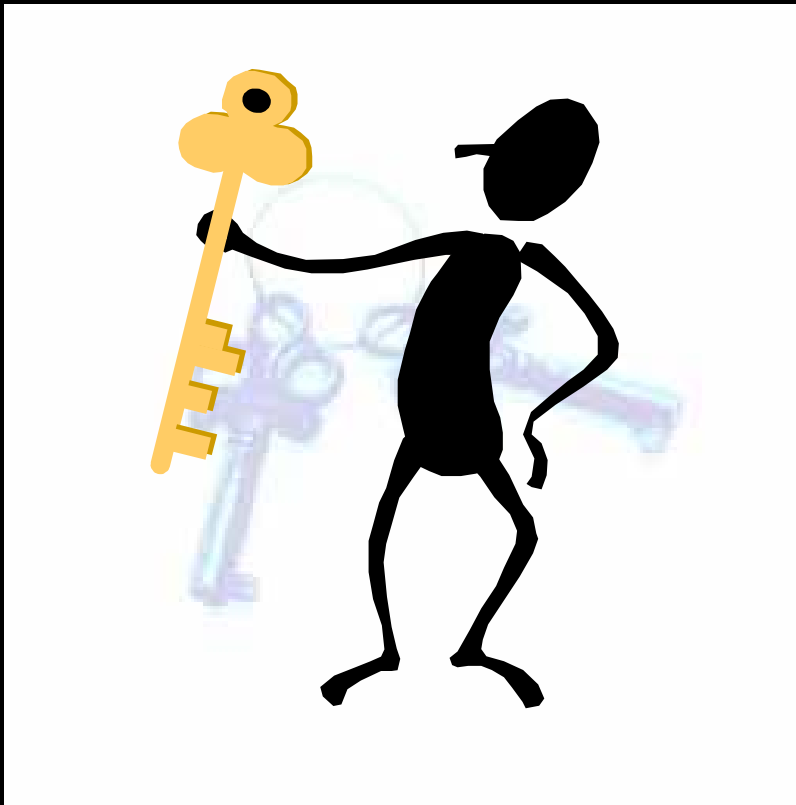
The OWNER Is



- One who **possesses** the rights to something. An owner has the right to create, alter, or destroy an asset as he chooses
- **Charged** with using impact analysis to make those decisions
- **Able** to balance the short term needs of specific processes with long term best interest of the enterprise
- **Empowered** to authorize funding if changes require unplanned and unbudgeted resources



The STEWARD Is



- One who **manages** something that belongs to someone else
- **Accountable** for a business artifact at an enterprise level
- **Charged** with assessing change impacts
- **Able** to balance the short term needs of process with the long term best interest of the enterprise
- **Empowered** to provide advocacy if changes require unplanned and unbudgeted resources

Documentation

Information needed for stewardship *needs* to be available

But can be just a by-product

Fix a problem to travel the first leg

DOCUMENTATION PROCEDURE

The purpose of the Stewardship Documentation Procedure is to define the metadata required supporting Stewardship administration and maintenance of information assets at T. Rowe Price.

Currently, there is no standard mechanism for storing, tracking, and reporting Stewardship roles, responsibilities, issues, and concerns. This procedure should address gathering Stewardship metadata, and maintenance of that metadata. Finally, in an environment where rapid change is expected, ownership and stewardship issues represent a major impact on the ability to deliver projects on time and under budget. This procedure provides the guidance for documenting the results of any mediation.

Documentation Option Matrix

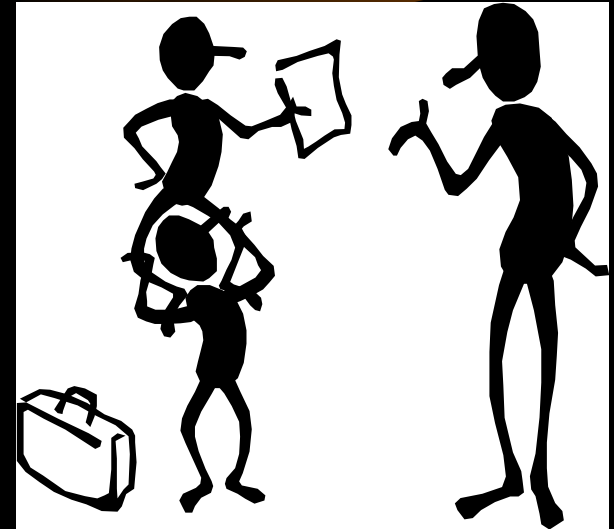
This matrix outlines the options considered before making the Stewardship Proposal:

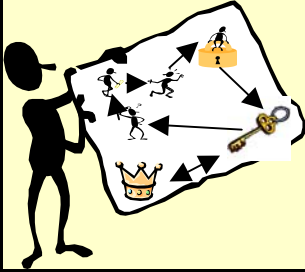
Stewardship Metadata	Spreadsheet	In Models	Repository	New Database
Artifact Type (i.e. Entity, Attribute, Table, Row, Column, View, Object, Class, Process, Hardware, Product...)	Column, from a list of specific values.	Dependent on model tool Artifact type-Entity, Table, Row, Column, View-would use customized UDP fields.	Repository Information Model Expansion Repository Attribute Type	New Table for Valid Values. Column on New StewardshipArtifact Table connected w/Referential Integrity.
Artifact Name (i.e. Customer, Customer Name, TCF_CUS, etc.)	Column, with fully qualified name for Production Instance.	*		Column on new StewardshipArtifact Table
Owner	Column, specific names	*		*
Steward	Column, specific names.	*		*
Consumer	Column, should have system or product name.	*		*
Producer	Column, Should have system or product name	*		*
Issues & Concerns	Column, free format text	*		*
Latest Update User Identifier	Column, Enter User Identifier	*		*
Latest Update User Timestamp	Column, Enter Date	*		*
Created User Identifier	Column, Enter User Identifier	*		*

Example

(Select Data) Issues

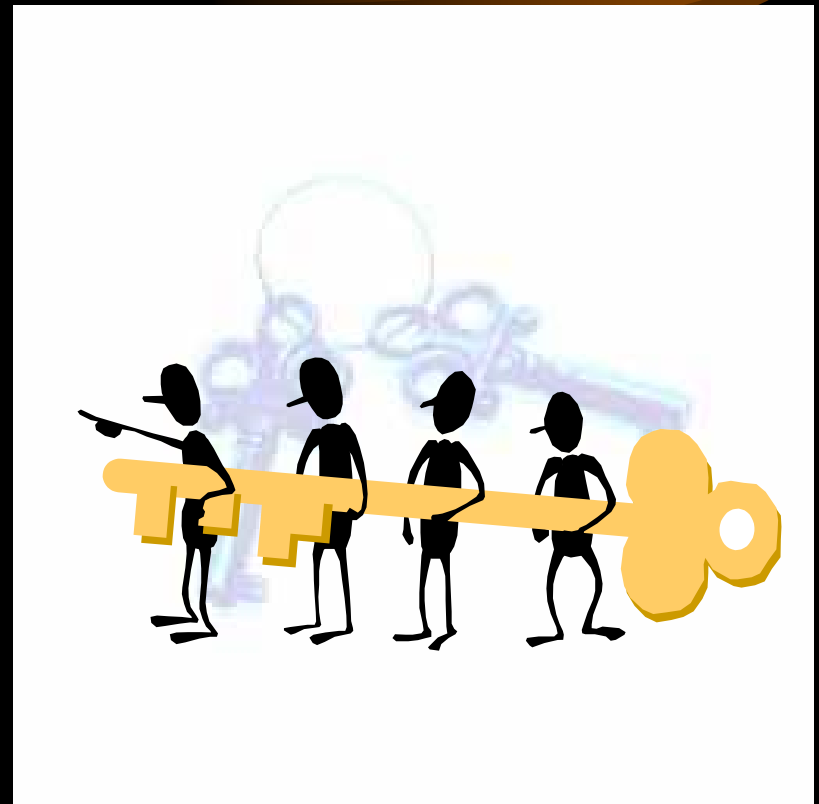
- Currently multiple sources
- No coordination of data across sources
- Replication of input activity
- Data quality issues





The Opportunity

- **Map it as you go!**
 - Support the resources required to coordinate maintenance & ensure data accuracy
 - **Document** ownership and stewardship information
 - **Highlight** savings at the next iteration of change, by making the information available



Mediation

Potholes, road blocks,
detours are all
facts of life

But you can be
prepared;
Wear a safety belt!

Stewardship

Mediation Option Matrix

This matrix outlines options for addressing Stewardship issues. Please note that the decision can specify options from different tracks.

Stewardship Mediation Activity	Track 1- No Conflict FASTTRACK	Track 2- No Conflict; Meeting required.	Track 3- Conflict.
Requesting Mediation	Email request to a newly established Stewardship Administration mailbox.	Email request to a newly established Stewardship Administration mailbox.	Email request to a newly established Stewardship Administration mailbox.
Determining Mediation Timeframe	Same-day response to provide input for a moderated discussion Email thread? User Group newthread? (see TRPITJUG) at the Stewardship Intranet page.	Same-day response to provide input for meeting setup, assigning a facilitator and scribe.	Same-day response to provide input for meeting setup, assigning a mediator/facilitator and scribe.
Identifying Producers and Consumers of the artifact.	The requestor can refer to Stewardship Baseline from Y2K (to be available on the intranet). The requestor should identify additional parties, not specified in the baseline. All parties should be CC'd on the email request to facilitate setup of the thread, and notification of activation.	The requestor can refer to Stewardship Baseline from Y2K (to be available on the intranet). The requestor should identify additional parties, not specified in the baseline. All parties should be CC'd on the email request to facilitate meeting setup.	The requestor can refer to Stewardship Baseline from Y2K (to be available on the intranet). The requestor should identify additional parties, not specified in the baseline. All parties should be CC'd on the email request to facilitate meeting setup.
Identifying Decision Maker	If the steward is not specified in the baseline, the manager at the level where all interested parties meet will be considered the final decision-maker and temporary steward. During the request event a steward will be identified and recommended to the artifact owner. Upon acceptance, this information will be added to the Baseline by Stewardship Administration.	If the steward is not specified in the baseline, the manager at the level where all interested parties meet will be considered the final decision maker and temporary steward. During the request event a steward will be identified and recommended to the artifact owner. Upon acceptance, this information will be added to the Baseline by Stewardship Administration.	If the steward is not specified in the baseline, the manager at the level where all interested parties meet will be considered the final decision-maker and temporary steward. During the request event a steward will be identified and recommended to the artifact owner. Upon acceptance, this information will be added to the Baseline by Stewardship Administration. If the issues become contentious the steward will take on the role of mediator and identify the impediments to implementation. The scribe will document the issues. The manager at the level where all parties in conflict intersect will be notified of the conflict and issues. Either the manager will take on the role of mediator in order to drive to a decision in a timeframe acceptable to the requestor, or empower the facilitator to drive the mediation decision.

Close Full Screen

Example

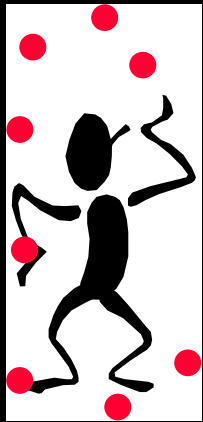
Goal for This Mediation

- Establish ownership & stewardship for (selected data)
- Begin to document the answers for all lines of business:
 - **Who** asks for new information?
 - **What** is the correct source of that information?
 - **When** is it paid for?
 - **Where** is it stored?
 - **Why** is it being used, and **how** should we maintain it?

Example

Problem Description:

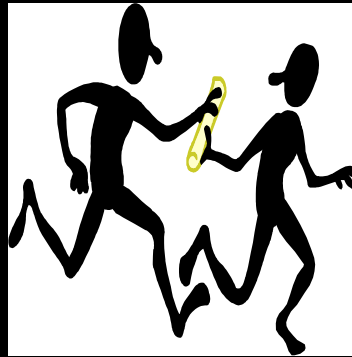
We don't know who, what, when, where, why, or how to uniquely identify new (selected data).



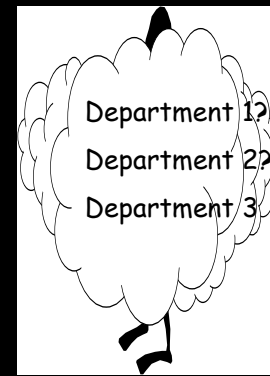
Identify
(Selected
Data) Need



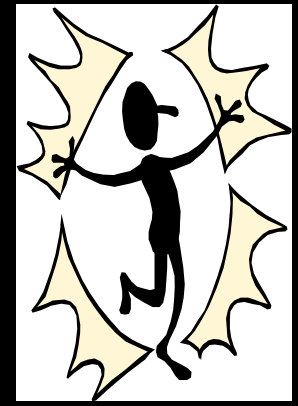
Decide to
get
(Selected
Data)



Locate
(Selected Data)



(Selected
Data) Initial
Load and
Startup



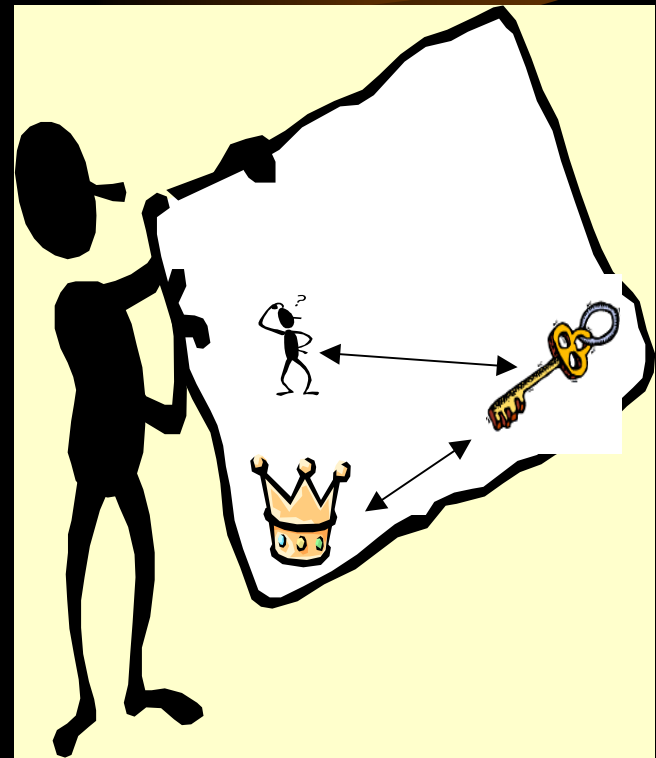
(Selected
Data)
available able
to perform
job.

Travel Tips

DAMA chapters

Discussion groups

<http://www.Infoadvisors.com/datamodellist.Htm>





Thank you

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