WORKSHOP OBJECTIVES

• Gain hands on experience in business architecture capability and value mapping

• Produce reference content for the global business architecture community

• Jump start in-house efforts for your business architecture

• Establish a baseline for a government reference model

• Build content as you build your skills
GOVERNMENT REFERENCE MODEL
WORKSHOP AGENDA

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Abstract</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:45–9:15 am</td>
<td>Government Reference Model Workshop: Goals, Background &amp; Agenda</td>
<td>Session overviews reference model value proposition, usage context, sample content, and workshop goals.</td>
</tr>
<tr>
<td>09:15–9:45 am</td>
<td>Reference Model Mapping Principles &amp; Guidelines – Crash Review</td>
<td>Session provides mapping session guidelines and principles and shares reference model content for breakout teams.</td>
</tr>
<tr>
<td>09:45–10:00 am</td>
<td>Reference Model Logistics &amp; Breakout Team Assignments</td>
<td>Session identifies breakout teams based on government subsectors and assigns breakout session leads.</td>
</tr>
<tr>
<td>10:00–10:20 am</td>
<td>Morning Break</td>
<td></td>
</tr>
<tr>
<td>10:20 am–Noon</td>
<td>Capability Mapping Breakout Sessions: By Government Subsector</td>
<td>Breakout teams articulate capabilities by government subsector, including revenue, public works, procurement, agriculture, homeland protection, defense, procurement, health, and others to be determined.</td>
</tr>
<tr>
<td>Noon–1:00 pm</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:00–1:45 pm</td>
<td>Capability Mapping Results Review</td>
<td></td>
</tr>
<tr>
<td>1:45–2:30 pm</td>
<td>Value Stream Mapping Breakout Sessions: By Government Subsector</td>
<td>Breakout teams share capability mapping definition and decomposition results and exchange feedback.</td>
</tr>
<tr>
<td>2:30–2:50 pm</td>
<td>Afternoon Refreshment Break</td>
<td></td>
</tr>
<tr>
<td>2:50–4:00 pm</td>
<td>Value Stream Mapping Breakout Sessions: By Government Subsector</td>
<td>Breakout teams align based on government subsectors to define business architecture value propositions, stakeholders, and related value streams.</td>
</tr>
<tr>
<td>4:00–5:00 pm</td>
<td>Value Stream Mapping Results Review</td>
<td>Breakout teams share value stream definition results, discuss alignment to capabilities, and exchange critique.</td>
</tr>
<tr>
<td>5:00–5:20 pm</td>
<td>Review Lessons Learned &amp; Discuss Post-Workshop Next Steps</td>
<td>Session discusses options for moving forward and sharing and maturing the results of the working sessions long-term.</td>
</tr>
</tbody>
</table>

- Overview, approach, organizing structure, workshop sessions, recaps and lessons learned / next steps
• Business Architecture Guild® produces reference model content that is free to Guild members
• Reference models are for internal use only for individuals and organizations that download the content
• Currently covers several vertical industries and a common reference model
• All reference model content is aligned to Guild principles (per BIZBOK® Guide)
• Reference models are made available in BIZBOK® and as downloads – released incrementally
• Each reference model is owned by a reference model collaborative team, mentored under the Guild’s collaborative team infrastructure
• Guild sponsored 1st government reference model workshop in 2018: Reston VA
• Government Reference Model team formed in Q2 2018
• Reference models (including derivative content) are not to be shared externally, resold or distributed for profit and are for the benefit and internal use of Guild members
WHAT IS A BUSINESS ARCHITECTURE, INDUSTRY REFERENCE MODEL?

• Why industry reference models?
  • Establish a principle-based, best practice-driven business architecture orientation for a given industry
  • Help jump start a company beginning a business architecture mapping effort or retrofitting existing model
  • Transfer knowledge as to what constitutes a robust, principle-based business architecture reference model

• What form do they take?
  • Packaged in standard BIZBOK® template format
  • BIZBOK® Guide summary level representations in Part 8
  • Downloadable content shared in populated templates
  • Content is maintained in tools by various teams

• Long-term goal
  • Ensure consistency across industry sectors in relation to terminology, common capabilities and value streams, decomposition structure for certain capabilities
  • Deliver a plug-and-play set of reference model components that would enable organizations with hybrid business models to construct a reference model
PRE-WORKSHOP / POST-WORKSHOP ACTIVITIES

• Pre-workshop preparation – Government Reference Model
  • Guild government reference model team prepared material for review
  • Work included drafting a level 1 capability map and a value stream inventory
  • Note that ecosystem scope was limited to non-DoD / Defense business models

• Workshop
  • Extend and refine reference models
  • Provide feedback

• Post-workshop next steps
  • Join the government reference model team
  • Incorporate workshop results into ideas for moving forward
  • Mature and release content
  • Package content into BIZBOK® Guide and v1.0 of downloadable content (2019)

All mapping work and results are governed by the Business Architecture Guild and BIZBOK® Guide principles and guidelines

9/22/2018
Copyright 2018
BUSINESS ARCHITECTURE OVERVIEW & PRINCIPLES

• Business Architecture Overview
• Capability Mapping
• Value Stream Mapping
Comprehensive representation of business ecosystem, regardless of industry sector

A REVIEW OF CAPABILITY MAPPING BASICS

• Capabilities define what, not how, providing a robust, long-standing business perspective.

• Capabilities represent unique, non-redundant views of the business that are defined once for the business.

• Capabilities are not defined haphazardly or on demand by a given program or business unit, but represent a foundational, ubiquitous business perspective across programs and business units.

• Capability maps only contain capabilities.

• Every capability has a definition.

• A business will have one capability map for its business ecosystem.

• Capabilities are based on business objects that create concise, unambiguous, and clearly delineated business perspectives – all child capabilities are bounded by the parent object.

• Capabilities live within the context of an overall business architecture.

Source: BIZBOK® Guide, Business Architecture Guild
CUTTING THROUGH THE CONFUSION: DEFINING CAPABILITIES BASED ON BUSINESS OBJECTS

• Business object: Abstract representation of a concrete actor within the business

• Business object names – derived from your business vocabulary
  ▪ Shared, rationalized vocabulary is required and must come from the business!

• Terms for business objects, such as...
  ▪ Customer, Product, Partner, Agreement, Location, Event, Facility, Asset

• Serve as basis for capability names, such as...

Source: BIZBOK® Guide, Business Architecture Guild
A REVIEW OF CAPABILITY MAP BASICS – STRATIFICATION STRUCTURE

STRATIFICATION

TIER 1 FOCUS: ORGANIZATION DIRECTION

TIER 2 FOCUS: MAXIMIZE VALUE

TIER 3 FOCUS: EXPENSE MANAGEMENT

Source: Business Architecture Associates, Inc.
A REVIEW OF CAPABILITY MAP BASICS – LEVELING STRUCTURE

LEVEL 1

BUSINESS PLAN MGMT
- Strategy Mgmt
- Plan Definition
- Plan Dissemination
- Business Performance Management

INVESTMENT MGMT
- Investment Identification
- Investment Portfolio Mgmt
- Secondary Market Mgmt
- Investment Funding
- Investment Reporting

MESSAGE MGMT
- Market Definition
- Message Validation
- Message Structuring
- Message Matching
- Message Reporting

RESEARCH MGMT
- Research Definition
- Research Identification
- Research Interpretation
- Research Structuring
- Research Dissemination

AGREEMENT MGMT
- Agreement Definition
- Agreement Offering
- Agreement Structuring
- Agreement Matching
- Agreement Case File Mgmt.

DELIVERY CHANNEL MGMT
- Delivery Channel Definition
- Delivery Channel Analysis
- Delivery Channel Matching

PARTNER MGMT
- Partner Definition
- Partner-to-Partner Matching
- Partner Information Mgmt.

PRODUCT MGMT
- Product Conceptualization
- Product Design
- Product Creation
- Product Deployment
- Product Lifecycle Mgmt.

CORE / CUSTOMER-FACING CAPABILITIES

CUSTOMER MGMT
- Customer Definition
- Customer Incentive Mgmt.
- Customer Information Management
- Customer Analysis

AGREEMENT MGMT
- Agreement Definition
- Agreement Offering
- Agreement Structuring
- Agreement Matching
- Agreement Case File Mgmt.

DELIVERY CHANNEL MGMT
- Delivery Channel Definition
- Delivery Channel Analysis
- Delivery Channel Matching

PARTNER MGMT
- Partner Definition
- Partner-to-Partner Matching
- Partner Information Mgmt.

PRODUCT MGMT
- Product Conceptualization
- Product Design
- Product Creation
- Product Deployment
- Product Lifecycle Mgmt.

LEVEL 2

WORK MGMT
- Submission Mgmt.
- Routing Mgmt.
- Work Queue Mgmt.
- Notification Mgmt.

EVENT MGMT
- Event Definition
- Event/Schedule Matching
- Event/Asset Matching
- Event/Location Matching

TRAINING MGMT
- Submission Mgmt.
- Routing Mgmt.
- Work Queue Mgmt.
- Notification Mgmt.

FINANCE MGMT
- Financial Account Management
- Money Movement
- Financial Information Mgmt.

INFORMATION MGMT
- Information Definition
- Information Organization
- Information Aggregation
- Analytics Management
- Information Dissemination
- Information Packaging

ASSET MGMT
- Asset Definition
- Asset Matching
- Asset Inventory Mgmt.

PROGRAM MGMT
- Program Definition
- Program/Schedule Matching
- Program/Asset Matching
- Program/Resource Matching
- Portfolio Information Mgmt.

Source: Business Architecture Associates, Inc.
BASIC CAPABILITY MAPPING SPREADSHEET TEMPLATE

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
</table>

- **Tier**
  - 1=Strategic, 2=Core, 3=Supporting

- **Level**
  - 1, 2, 3, 4, 5, 6

- **Capability Name**

- **Definition of Capability**

Source: BIZBOK® Guide, Business Architecture Guild
# CAPABILITY MAP EXAMPLE IN STANDARD TEMPLATE:
## LEVEL 1 DECOMPOSITION

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>Asset Management</td>
<td>Ability to acquire, create, track, report on, and dispose of, tangible or intangible property, with intrinsic value.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Definition</td>
<td>Ability to conceptualize, design, and create an asset.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Version Management</td>
<td>Ability to create and maintain information related to the augmentation or modification of an asset.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Valuation</td>
<td>Ability to assess an asset to assign a monetary value to it.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Lifecycle Management</td>
<td>Ability to make decisions concerning assets over time, between the time they are acquired or created until they are destroyed or otherwise end their status as an asset.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Configuration</td>
<td>Ability to conjoin an asset with another asset or to set it up and prepare it for use.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Deployment</td>
<td>Ability to make the asset available to the organization for its intended use.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Validation &amp; Verification</td>
<td>Ability to determine if an asset is the proper and correct asset and to check this assessment against a source.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Access Management</td>
<td>Ability to control what members of an organization, a partner, or other stakeholder is able to use or otherwise dispose of an asset.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Risk Management</td>
<td>Ability to evaluate the risk associated with assets.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset / Asset Matching</td>
<td>Ability to match assets to locations, partners, work or other assets.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset / Asset Matching</td>
<td>Ability to associate one asset with another.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset / Location Matching</td>
<td>Ability to associate an asset with a location.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset / Partner Matching</td>
<td>Ability to associate an asset with a partner.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset / Work Matching</td>
<td>Ability to associate an asset with work.</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
<td>Asset Information Management</td>
<td>Ability to create, update and disseminate information concerning tangible and intangible property.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset Profile Management</td>
<td>Ability to create, update and disseminate metadata concerning an asset or assets.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset Type Management</td>
<td>Ability to categorize assets.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset State Management</td>
<td>Ability to acquire and maintain information concerning the disposition of an asset at any given point in time.</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Asset History Management</td>
<td>Ability to record, maintain and disseminate information concerning an asset as it changes over time.</td>
</tr>
</tbody>
</table>

Source: BIZBOK® Guide, v6.0, Section 8.6 draft
Best Practices for level 2 object definition and decomposition

Level 1: ____ Management (e.g., Customer Management)

Level 2: ____ Information Management (e.g., Customer Information Management)

  Level 3: ____ Profile Management (e.g., Customer Profile Management)
  Level 3: ____ Type Management
  Level 3: ____ State Management
  Level 3: ____ History Management
  Level 3: ____ Analytics Management (for selected level 1 capabilities)

Level 2: ____ Definition (e.g., Customer Definition)

Level 2: ____ Matching (e.g., Customer Matching)

Where certain objects defined by other capabilities are associated with the level 1 parent object

  Level 3: ____ / ____ Matching (e.g., Customer / Product Matching)
  Level 3: ____ / ____ Matching (e.g., Customer / Location Matching)
  Level 3: ____ / ____ Matching (e.g., Customer / Customer Matching)

In the matching example, Customer is the controlling object to which other objects are matched

Source: BIZBOK® Guide, Business Architecture Guild
CAPABILITY BEST PRACTICES – STANDARD PATTERNS

Best Practices for level 2 object definition and decomposition

Additional level 2 capabilities vary depending on the object – here are some examples:

For Product Management: Product Conceptualization, Design, Validation, etc.
For Asset Management: Asset Definition, Design, Evolution, etc.

Certain capabilities associated with agreements or customers, for example, have preference, risk, and access capabilities

Level 2: ____ Preference Management (e.g., Customer Preference Management)  (Where preferences are formal structures)
Level 3: ____ Preference Definition (e.g., Customer Preference Definition)
Level 3: ____ Preference Interpretation
Level 3: ____ Preference Enforcement

Level 2: ____ Lifecycle Management (e.g., Product Lifecycle Management)  (Accommodates management of evolutionary states)
Level 2: ____ Access Management (e.g., Customer Access Management)
Level 2: ____ Risk Rating (e.g., Customer Risk Rating)

Note that Risk is typically associated with specific business objects but may be aggregated under a level 1 capability

Source: BIZBOK® Guide, Business Architecture Guild
Value stream is “an end-to-end view of how value is achieved for a given stakeholder”

- Stakeholders may be external, such as a customer taking a trip on an airline:

- Or stakeholders may be internal, such as a scheduler initiating a plane to fly to a destination:

- Value streams strive to achieve value proposition stated in its name for the “triggering” stakeholder

*Above two value streams are unique and independent of one another*

Source: BIZBOK® Guide, Business Architecture Guild
Value

• “The benefit that is derived by an organization’s stakeholder while interacting with that organization”.

Value proposition

• “An innovation, service, or feature intended to make a company, product, or service attractive to customers or related stakeholders”.

Value item

• “The judgment of worth, made by an individual or organization, attached to something tangible or intangible and attained in the course of a particular interaction with one or more other parties”.

Value items aggregate, stage by stage, to collectively contribute to the delivery of the end state value proposition

Source: BIZBOK® Guide, Business Architecture Guild
VALUE STREAMS & VALUE MAPPING PERSPECTIVES

- When we say value stream, we mean business architecture value streams as defined in industry best practices and body of knowledge*
  - A value stream is an “end-to-end” perspective
  - “The value stream has a clear goal: to satisfy or to delight the customer”**
  - When we say value chain, we mean the Porter “value chain”***
  - Value streams in this context are not Lean Six Sigma or “lean value streams” – which are essentially processes

- Capability vs. Value Stream: Capability views a business “at rest”, value stream views a business “in motion”


** As cited in “The Great Transition”, by James Martin, 1995

*** Competitive Advantage, Michael Porter, 1985
ANATOMY OF A VALUE STREAM

Value Stream Name, Definition & Value Proposition

Settle Claim
- Accept Claim
- Validate Claim Request
- Issue Claim Payment
- Notify Customer

Value Stream Stage Name, Definition, Entrance Criteria, Exit Criteria, Participating Stakeholders and Value Item

Value Proposition
Claimant Made Whole

Source: BIZBOK® Guide, Business Architecture Guild
NAVIGATING VALUE STREAMS: ENTRANCE / EXIT CRITERIA, OBJECT STATE TRANSITIONS TOWARDS ACHIEVING VALUE

- Navigation dictated by object state transitions, controlled by capabilities, meeting certain entrance and exit criteria
- Value items are achieved through an aggregation of capability outcomes within a stage
- Value proposition is achieved through an aggregation of value items

Source: BIZBOK® Guide, Business Architecture Guild
VALUE STREAM MAPPING TEMPLATE: FACILITATES VALUE STREAM ARTICULATION

<table>
<thead>
<tr>
<th>Value Stream</th>
<th>Value Stream Stage</th>
<th>Description</th>
<th>Value Proposition</th>
<th>Entrance Criteria</th>
<th>Exit Criteria</th>
<th>Value Item</th>
<th>Stakeholder(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Templates enable mapping teams to articulate a value stream and related stages.

In this template, value stream is listed on first row, with value stream stages listed below.

Where information is not applicable, it is blocked out.

For example, value streams have value propositions but not value items, and vice versa.

Stakeholder column represents triggering stakeholder(s) for the value stream and participating stakeholders for value stream stages.

Source: BIZBOK® Guide, Business Architecture Guild
<table>
<thead>
<tr>
<th>Value Stream Stage</th>
<th>Description</th>
<th>Value Stream Stage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish Financial Account</td>
<td>The end-to-end perspectives involved in establishing a customer account</td>
<td>Financial Account Established</td>
<td></td>
</tr>
<tr>
<td>Receive Application</td>
<td>The act of receiving an application for a new customer account</td>
<td>Application Initiated</td>
<td></td>
</tr>
<tr>
<td>Validate Application</td>
<td>Verification that the individual establishing the account is qualified to have an account</td>
<td>Application Received</td>
<td></td>
</tr>
<tr>
<td>Activate Financial Account</td>
<td>The activation of an account for a fixed period of time</td>
<td>Application in Progress</td>
<td></td>
</tr>
<tr>
<td>Notify Customer</td>
<td>The act of notifying the individual applying for an account that the account has been established or denied</td>
<td>Application Validated</td>
<td></td>
</tr>
</tbody>
</table>

**Value Proposition**
- Financial Account Established

**Entrance Criteria**
- Application Initiated
- Application Received
- Application Validated

**Exit Criteria**
- Application in Progress
- Credit Check Completed

**Value Item**
- Account Activated
- Account Ready to Use

**Stakeholder(s)**
- Customer
- Customer, Help Desk
- Customer, Reviewer
- Customer, Approver

*Source: BIZBOK® Guide, Business Architecture Guild*
PUTTING IT ALL TOGETHER

Value Stream

Value Stream Breaks Down into Stages

Delivers

Value Item(s)

Value Items Accrue to Deliver Value Proposition

Outcomes Contribute to Value Items

Business Unit

Has

Value Stream Stage

Capabilities Enable Value Stream Stage

Delivers

Value Item(s)

Outcome

Value Items Accrue to Deliver Value Proposition

Outcomes Contribute to Value Items

Business Unit

Capability

Produces

Information

Capability Requires, Modifies Information

Business Object

Based On
### Strategic Tier 1 – Level 1 Capabilities from Common Reference Model

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Brand Management</td>
<td>Ability to establish, organize, analyze, administer, and report on all aspects of a category of product or offerings under a particular name, unique symbol, mark, or logo that distinguishes it from other products in the market.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Business Management</td>
<td>Ability to set strategic direction, generally govern, manage operational execution, and measure performance against plan for the legal entity and its ecosystem.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Intellectual Property Management</td>
<td>Ability to define, establish, validate, value, obtain, or dispose of inventions, patents, trademarks, trade secrets, copyrights, and know how as a basis for furthering the overall mission of the enterprise.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Investment Management</td>
<td>Ability to identify, develop, analyze, valuate, exchange, acquire, dispose of, and report on any type of monetary asset purchased with the idea that the asset will provide income in the future or will be sold at a higher price for a profit.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Market Management</td>
<td>Ability to identify, name, analyze, frame, and cater to an actual, virtual, or otherwise nominal place where forces of demand and supply operate, and where buyers and sellers interact — directly or through intermediaries — to exchange products and services for monetary or non-monetary value.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Message Management</td>
<td>Ability to define, craft, frame, vet, disseminate, and track a structured conveyance of information, including missives, notifications, alerts, and other internally or externally targeted communication about the company's mission, products, plans, activities, and other focal points.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Plan Management</td>
<td>Ability to develop, communicate, and coordinate an articulated direction, related work items, and priorities to further business development, organizational priorities, and enterprise goals and objectives across business units and entities within or outside the organization.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Policy Management</td>
<td>Ability to establish, maintain, comply with, and administer a set of statues, legislation, rules, procedures, regulations, treaties, and principles driven by internal business directives and external organizations, governments, or related third-party actors.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Research Management</td>
<td>Ability to conduct systematic investigation into materials and sources in order to establish facts and reach conclusions that comprise a result.</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>Strategy Management</td>
<td>Ability to define and disseminate mission, vision, goals, objectives, action items, and key performance indicators for the business, products, or other interest as required.</td>
</tr>
</tbody>
</table>

Source: BIZBOK® Guide, Business Architecture Guild
Supporting Tier 3 – Level 1 Capabilities from Common Reference Model

<table>
<thead>
<tr>
<th>Tier</th>
<th>Level</th>
<th>Capability</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>Asset Management</td>
<td>Ability to acquire, create, track, report on, and dispose of, tangible or intangible property with intrinsic value.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Event Management</td>
<td>Ability to establish, use, sustain, disseminate, and analyze an occurrence or happening at a determinable time and place, including physical and virtual meetings, conferences, or related gatherings of two or more persons.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Finance Management</td>
<td>Ability to plan, direct, monitor, organize, control, and report on the monetary aspects and resources of the business.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Human Resource Management</td>
<td>Ability to assess, mentor, compensate, terminate, and otherwise coordinate individuals that are or have been incorporated under a legal agreement that includes compensation and other benefits, on a temporary or permanent basis.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Information Management</td>
<td>Ability to define, organize, structure, secure, protect, and disseminate facts, statistics, attributes, and other types of data about a business’ set of business objects.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Job Management</td>
<td>Ability to identify, define, assign, and manage accountabilities whether remunerative or non-remunerative, assigned, specific, and accountable business duty, role, or function that can be executed by a human or non-human resource.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Legal Proceeding Management</td>
<td>Ability to direct, administer, oversee, respond to, and generally administer all aspects of work related to a litigation filing, including trials, appeals, or related actions.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Location Management</td>
<td>Ability to define, calculate, articulate, determine, disseminate, or otherwise track a position or site of any given entity (person, organization, equipment, product, etc.).</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Program Management</td>
<td>Ability to organize, plan, direct, and communicate progress against milestones to deliver outcomes within defined resources, time, quality, and scope constraints.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Training Management</td>
<td>Ability to define, conceptualize, create, and convey structured content and knowledge in consumable format, associated with a curriculum a course, workshop, seminar, or related content.</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Work Management</td>
<td>Ability to capture, organize, prioritize, route, interpret, disseminate, and administer communications, tasks, and related decisions.</td>
</tr>
</tbody>
</table>

Source: BIZBOK® Guide, Business Architecture Guild
GOVERNMENT REFERENCE MODEL: BUSINESS MODEL

SCOPE & WORKSHOP TOPIC ALIGNMENT

• Topics are topically oriented, not agency or department oriented
• Everything has regulatory aspects so consider from other perspectives
• Teams will focus on capabilities and value streams for topic categories

• National Defense / Military / Law Enforcement / Volunteer Corps
• Border Control / Immigration / Customs / Tourism
• Work / Pension / Labor / Welfare / Child Care / Benefits
• Financial Management / Treasury / Taxation
• Licensing / Intellectual Property / Permits
• Agriculture / Fisheries / Animal Management
• Health / Disease Control
• Land / Asset / National Parks / Fleet / Forestry / Cemetery / Parking Management
• Governance / Elections / Parliamentary
• State / Diplomacy
• Energy / Gas / Solar / Oil
• Education
• Courts, Justice
• Interior, Parks, Wildlife
• International Development / State / Diplomacy
• Intelligence
• Arts / Sports / Recreation / Events
1. Break into teams based on functional focal points
2. Take assigned business objects to work on draft capabilities
3. Teams focus on an assigned set of level 1 capabilities from map
   - Team will define level 1 capabilities
   - Team will decompose each assigned level 1 to level 2 capabilities
4. Review / discuss / refine
5. Incorporate into capability mapping template
6. Present to full workshop audience
COMMON REFERENCE MODEL VALUE STREAMS – MAY BE INCORPORATED INTO ANY REFERENCE MODEL

Acquire Asset
- Request Asset
- Approve Order
- Source Order
- Place Order
- Receive Asset

Conduct Audit
- Request Audit
- Plan Audit
- Gather Audit Information
- Analyze Audit Information
- Document Audit Report
- Publish Audit Report

Ensure Compliance
- Identify Compliance Requirements
- Define Compliance Controls
- Implement Compliance Controls
- Validate Compliance Controls
- Report Compliance

Deliver Program
- Request Program
- Create Program Plan
- Approve Program Plan
- Resource Program
- Execute Program
- Finalize Program

Onboard Human Resource
- Request Position
- Validate Position
- Source Individuals
- Evaluate Individuals
- Finalize Acceptance
- Onboard Individual

Develop Human Resource Career
- Initiate Career Evaluation
- Evaluate Human Resource
- Develop Human Resource
- Transition Human Resource

Disseminate Information
- Request Information
- Source Information
- Process Information
- Package Information
- Deliver Information

Execute Campaign
- Request Campaign
- Plan Campaign
- Design Campaign
- Implement Campaign
- Evaluate Campaign

Optimize Investments
- Initiate Investment Review
- Assess Current Position
- Investigate Investment Options
- Select Investment Options
- Execute Investment Options

Report Financials
- Initiate Financial Statements Generation
- Prepare Financial Statements
- Approve Financial Statements
- Release Financial Statements
- File Financial Statements

Source: BIZBOK® Guide, Business Architecture Guild
### EXISTING VALUE STREAMS IN COMMON AND OTHER REFERENCE MODELS PART 1

<table>
<thead>
<tr>
<th>Value Stream</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboard Partner</td>
<td>The end-to-end perspective of identifying and commencing business with other organizations for mutual benefit.</td>
</tr>
<tr>
<td>Acquire Asset</td>
<td>The end-to-end perspective of acquiring an asset, from initiating and approving the asset request, to sourcing and processing procurement orders and delivering the asset to the requester.</td>
</tr>
<tr>
<td>Conduct Audit</td>
<td>The end-to-end perspective of determining the degree to which the organization is adhering to established policies and regulations.</td>
</tr>
<tr>
<td>Deliver Event</td>
<td>The end-to-end perspective of planning and executing an event.</td>
</tr>
<tr>
<td>Deliver Program</td>
<td>The end-to-end perspective of planning and executing a program.</td>
</tr>
<tr>
<td>Deploy Asset</td>
<td>The end-to-end perspective of evaluating, building, assembling, maintaining, and readying the asset for use to fill a need within an organization.</td>
</tr>
<tr>
<td>Develop Human Resource Career</td>
<td>The end-to-end perspective of developing an individual's career, from performance assessment to skills and experience enhancement and individual redeployment.</td>
</tr>
<tr>
<td>Disseminate Information</td>
<td>The end-to-end perspective of requesting, creating, and delivering of information products to requester.</td>
</tr>
<tr>
<td>Ensure Compliance</td>
<td>The end-to-end perspective of ensuring compliance with legislation and business-driven policies, from identifying compliance requirements to implementing controls, evaluating controls effectiveness, addressing compliance incidents, and reporting compliance as required.</td>
</tr>
<tr>
<td>Execute Campaign</td>
<td>The end-to-end perspective of executing a campaign, from identifying the need for a campaign, to planning, designing, implementing, and measuring the effectiveness of the campaign.</td>
</tr>
<tr>
<td>Activity</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Onboard Human Resource</td>
<td>The end-to-end perspective of identifying, exploring, and selecting an individual to fill a need within an organization.</td>
</tr>
<tr>
<td>Optimize Investments</td>
<td>The end-to-end perspective of deciding where to make investments, based on the understanding of the enterprise's goals, strategy, current positions, and external forces.</td>
</tr>
<tr>
<td>Report Financials</td>
<td>The end-to-end perspective of preparing, approving, and releasing external financial statements that disclose an organization's financial status to management, investors, and the government.</td>
</tr>
<tr>
<td>Settle Accounts</td>
<td>The end-to-end perspective enabling the bi-directional exchange of payments between an organization and a customer, partner, or human resource.</td>
</tr>
<tr>
<td>Create Policy</td>
<td>Activities involved in the end-to-end creation or update of policies that govern how the organization operates.</td>
</tr>
<tr>
<td>Resolve Issue or Inquiry</td>
<td>Activities necessary to track and resolve an issue or exception reported by a customer or other stakeholder.</td>
</tr>
<tr>
<td>Establish Agreement</td>
<td>Activities necessary for establishing a new or updating an existing agreement.</td>
</tr>
<tr>
<td>Trade Financial Instrument</td>
<td>The act of executing a financial instrument trade, including clearing and settlement.</td>
</tr>
<tr>
<td>Execute Transaction</td>
<td>Activities involved in completing a transaction for an agreement.</td>
</tr>
<tr>
<td>Acquire Coverage</td>
<td>The end-to-end perspective of obtaining coverage to indemnify against loss.</td>
</tr>
<tr>
<td>Settle Claim</td>
<td>The end-to-end perspective of determining to compensate for, or restoration of, an asset for a loss.</td>
</tr>
<tr>
<td>Deploy Facility</td>
<td>The end-to-end perspective related to planning, specifying, designing, and commissioning a facility upgrade.</td>
</tr>
<tr>
<td>Develop Product</td>
<td>The end-to-end value delivery perspective that delivers a ready-to-build design.</td>
</tr>
<tr>
<td>Manufacture Product</td>
<td>The end-to-end delivery perspective for creating a require-to-acquire product.</td>
</tr>
<tr>
<td>Acquire Product</td>
<td>Timely receipt of the product by the customer.</td>
</tr>
<tr>
<td>Cross Border (WIP)</td>
<td>Grant Land Use Rights (WIP)</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Decide Legal Proceeding</td>
<td>Grant License (WIP)</td>
</tr>
<tr>
<td>Import/ Export Goods</td>
<td>Immigrate to Live</td>
</tr>
<tr>
<td>Resettle in the UK</td>
<td>Hire a foreign worker</td>
</tr>
<tr>
<td>Educate a foreign student / sponsor a foreign person</td>
<td>Secure the Border</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Collect Intelligence</th>
<th>The method of collecting and analysing information to discover compliance anomalies which established compliance controls would not normally detect.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct Inquiry</td>
<td>The end-to-end perspective of determining the degree to which regulated entities are or are not complying with established policies, agreements and legislation. An inquiry covers inquiry types such as audits or investigations and may include field service and execution of</td>
</tr>
<tr>
<td>Monitor Compliance</td>
<td>The activities involved in establishing &amp; using compliance controls to track compliance of stakeholders and partners against policy and legislation.</td>
</tr>
<tr>
<td>Set Policy</td>
<td>The mechanism of establishing or updating an external policy or framework which impacts stakeholders of the authority. Scale may be small or large, from internal policy to legislation.</td>
</tr>
<tr>
<td>Resolve Non-Compliance</td>
<td>The method in which a breach of policy or legislation by a regulated body is addressed using appropriate disciplinary measures.</td>
</tr>
<tr>
<td>Respond to an Emergency</td>
<td>The end-to-end perspective of identifying, scoping, mobilizing, and otherwise responding to an emergency incident.</td>
</tr>
<tr>
<td>Optimize Network</td>
<td>The end-to-end perspective of planning, assessing, designing, and initiating modifications to a network for planned events, interventions, recovering from unplanned incidents, and streamlining real-time activity.</td>
</tr>
<tr>
<td>Deploy Infrastructure</td>
<td>The end-to-end perspective of planning, specifying, designing, and commissioning major or minor modifications to infrastructure, including roads, railways, bridges, tunnels, stations, rail corridors, and related structures.</td>
</tr>
<tr>
<td>Execute an Operation</td>
<td>The end-to-end perspective of planning, initiating, running, and terminating an operation.</td>
</tr>
</tbody>
</table>
• The value stream remediates a healthcare condition
• Value stream engaged by government payers or other stakeholders involved in healthcare
• Framework example should be used in workshop
1. Break into teams based on functional focal points

2. Each team takes 2-3 value streams based on stakeholders and value propositions
   - Combine, refine or add to the assigned value streams as initial step

3. Define value streams
   - Name, value proposition and triggering stakeholder
   - Each value stream stage

4. For one value stream, complete value stream template with all details
   - Stage name, value item, entrance and exit criteria, participating stakeholders

5. Refine

6. Present to full workshop audience
BEYOND THE WORKSHOP: NEXT STEPS

• Government reference model team is formed and open to any Guild member to join
• Team is internationally aligned but seeking more participants at all levels

• Next Steps:
  • Gather workshop results to be made available to collaborative team
  • Incorporate feedback into work in progress drafts
  • Roll out BIZBOK® Guide content for Q1 2019
  • Plan for downloadable reference model in 2019
BUSINESS ARCHITECTURE
GOVERNMENT REFERENCE MODEL WORKSHOP

September 2018 – Ottawa, Ontario, Canada

Workshop Chairs: Whynde Kuehn / William Ulrich
Team Leads: Cal Dellinger / Cecilie Hoffman

www.businessarchitectureguild.org