



SRP Voyage Toward Enterprise Information Stewardship:

**Boldly going where no utility
company has gone before!**

**DAMA Data Governance
Terry Mooney
Salt River Project
8/25/2011**

About SRP

- ➔ **SRP, based in Phoenix, was established in 1903 as the nation's first multipurpose reclamation project authorized under the National Reclamation Act.**
- ➔ **Today, SRP is the nation's third-largest public power utility and one of Arizona's largest water suppliers.**





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Introduction

SRP's Multi-Year Information Governance Mission:

explore unstructured & structured information,

seek out R.O.T.,

educate employees about managing valuable records,

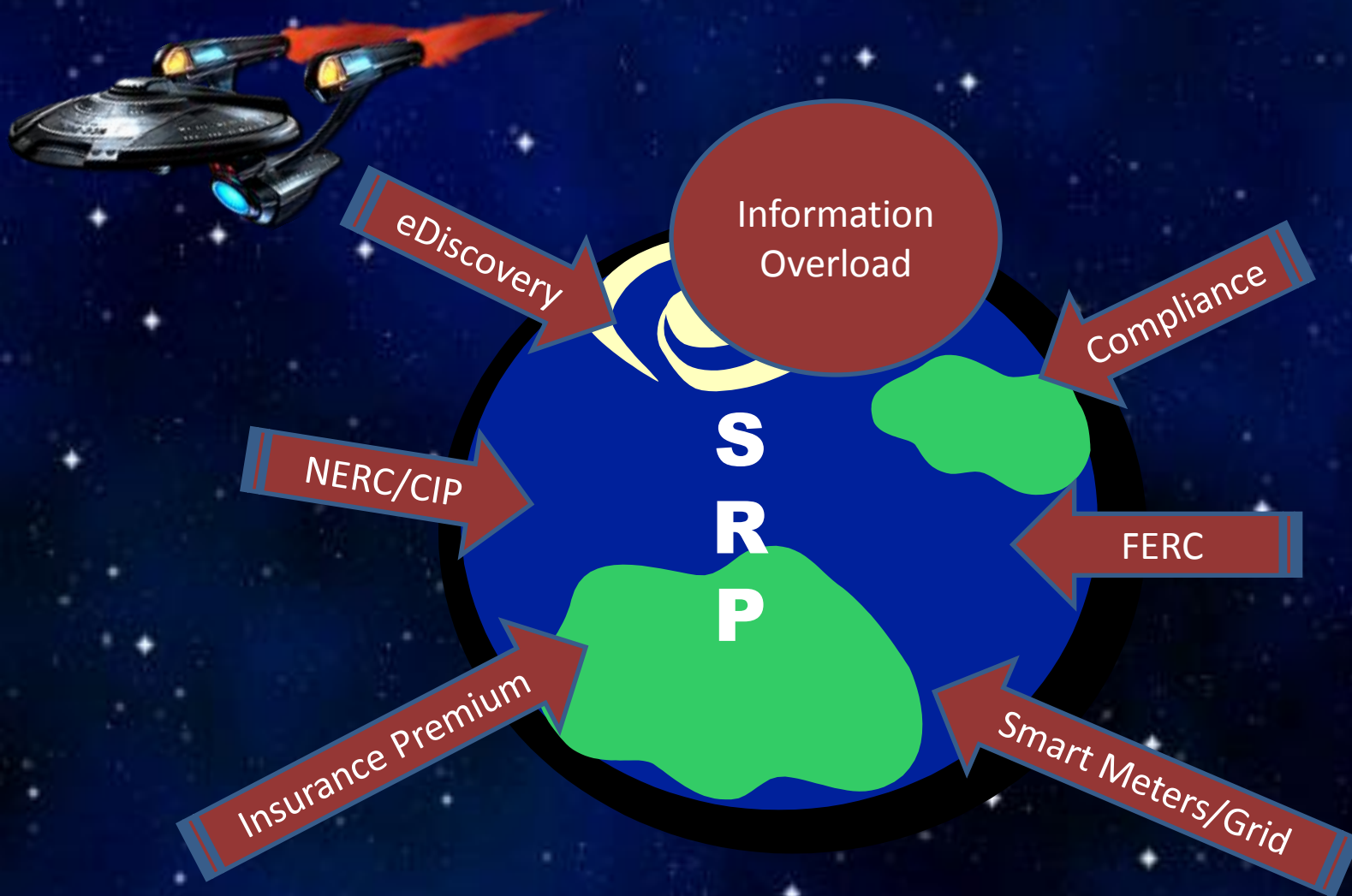
and measure performance

to sustain SRP's advancing Information Management

(IM) maturity



Information Management at HECL... SRP



...10 years Earlier

- ➔ **Focus on structured**
- ➔ **Missing Roadmap and Strategy**
- ➔ **Program lacked sustainability**
- ➔ **Training**
- ➔ **Accountability**
- ➔ **Priority**



Our New Mission Manifest

- ➡ **SRP Voyager (Team Formation)**
- ➡ **Mission Objectives**
- ➡ **Post-Mission Debrief**
- ➡ **Future Missions (Unexplored/Undiscovered)**

SRP Voyager

➡ Building the Ship in flight

➡ People

➡ Process

➡ Technology

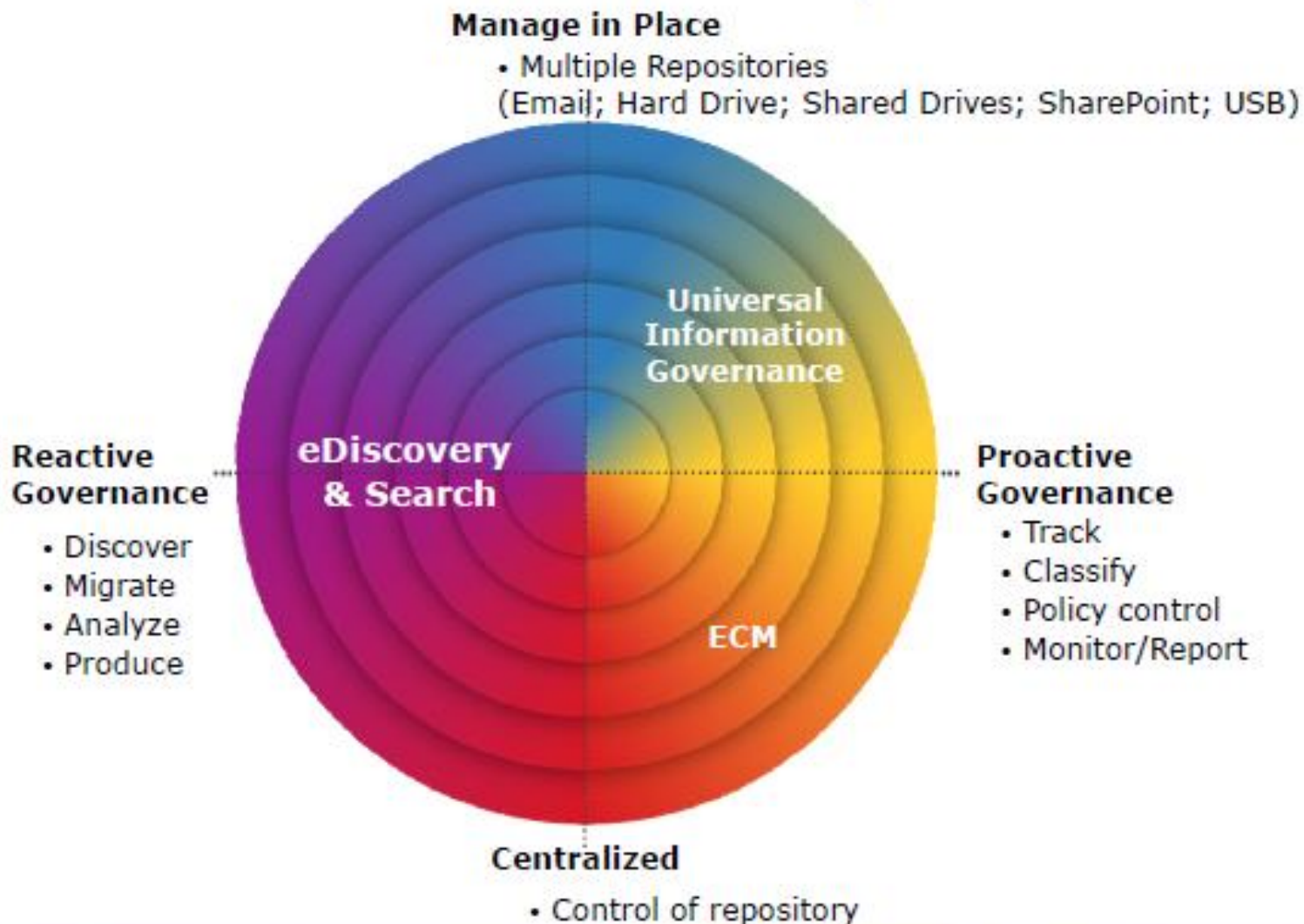
➡ Success Measures



Mission Objectives

- ➔ **Establish the Roadmap**
- ➔ **Establish a Governance Framework**
- ➔ **Establish a Learning Model**
- ➔ **Develop IM Toolkits**
- ➔ **Leverage what is already working!**

Information Governance Model



Dual Mission

Rational

Emotional



**Information is
an ASSET**

**Information
Management
DISCIPLINE**

Information is an ASSET



Planet Discover



- ➡ **Enable and Implement Information Discovery Tools and Processes**
- ➡ **Classify and Secure High Risk Information – (PII, HIPPA, NERC/CIP)**

Planet Inventory

- ➡ **Information Management Assessment (IMA)**

- ➡ **Department report**

- ➡ **Identify gaps and improvements**



Planet Stewardship

- ➡ **Custodian Cadets**
- ➡ **Partners in IM journey**



Planet Classify



➡ **Classification Service**

➡ **Retention project**

➡ **Enterprise taxonomy, Ontology &
Canonical**

- Rousseau David
FIN1000, Accounting and Financial Internal
Reporting

NEXT ►



Akers Mary E
Darnell-Nelson Renee M
Dimas Yvette M
Friend Stephanie
Grimm Jill D
Hernandez Jr Rudy
Kalb-Conrow Mary

31523, CUSTOMER ACCOUNTS
31524, CUSTOMER ACCOUNTING
31800, REVENUE CYCLE SVCS
53500, CORP ACCOUNTING SVCS
53520, JOINT OWNERSHIP ACCOUNTING
53530, FINANCIAL ACCOUNTING
53540, ACCOUNTS PAYABLE

Accounting and Statistical Reviews
Contracts and Agreements
Financial Reports & Supporting Documents
Financial Reports & Supporting Documents
Financial Reports & Supporting Documents

FIN1000, Accounting and Financial Internal Reporting

Planet Secure



- ➡ **Information secured for transport**
- ➡ **Cloud clause**
- ➡ **Sensitivity (based on NIST standards)**

Planet Share



- ➔ **Principle of Transparency**
- ➔ **Managed systems (SharePoint)**
 - ➔ **Reusability instead of redundancy**
 - ➔ **Current instead of outdated**
 - ➔ **Relevant instead of trivial**

Planet Disposition



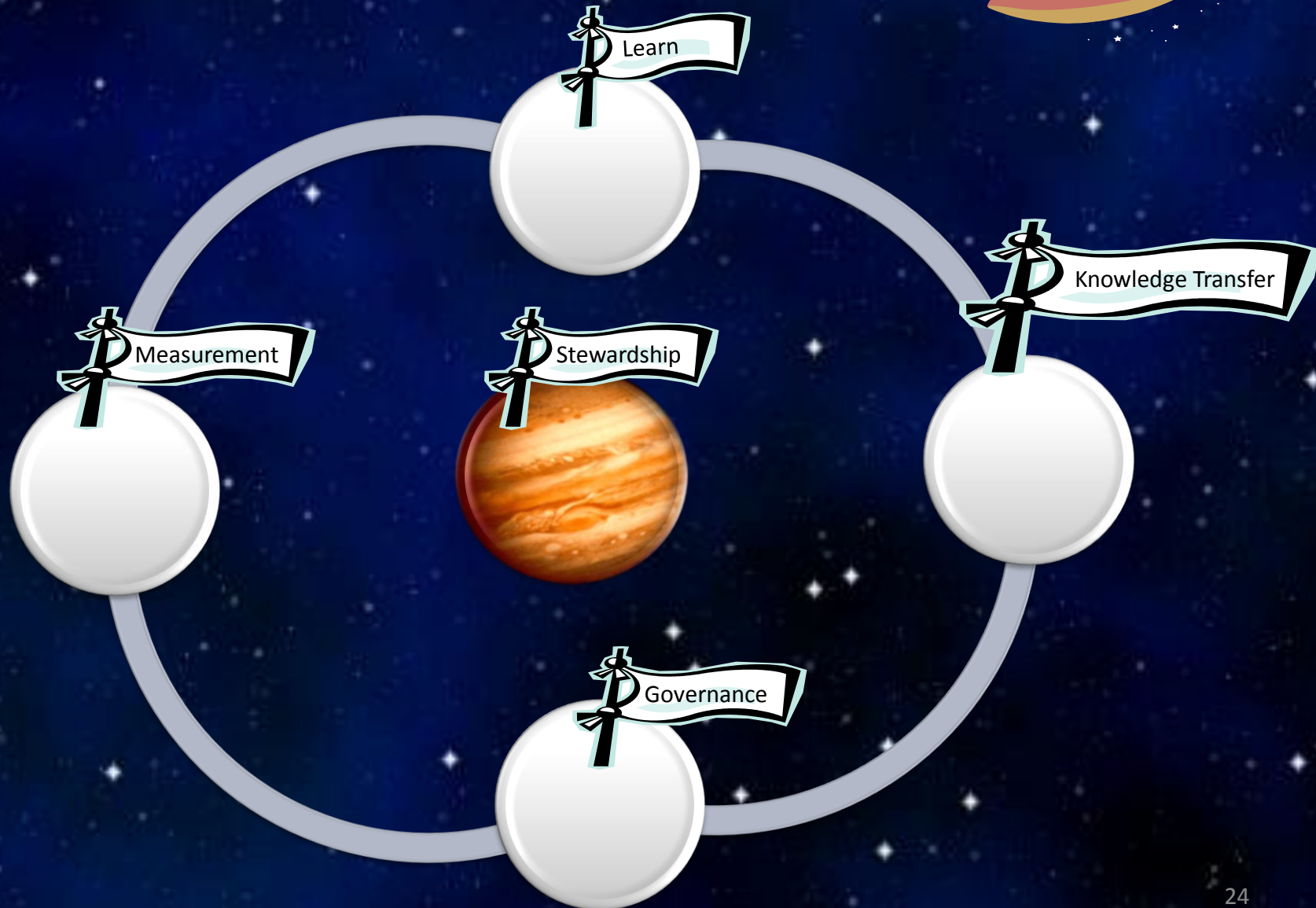
- ➔ ROT clean-up
- ➔ Launch “Disposition Depot”
- ➔ Archival standards & purging processes



Information is an ASSET



The Moons of Stewardship



Moon Learn



➡ **IM AWARE!**

➡ **Introduce
concepts**

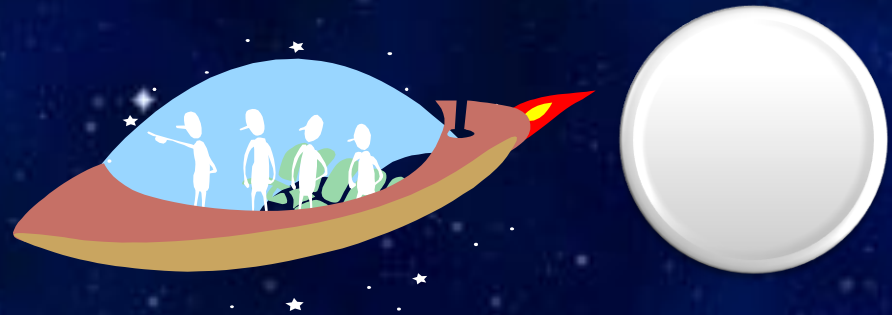
➡ **IM LEARNING!**

➡ **Training**

➡ **Assessment**



Moon Knowledge Transfer



Information Management Discipline through the Stewardship Program

Stewardship is the Information Management (IM) Program helping employees at SRP classify, store, secure, preserve, and destroy information using consistent, cost-effective processes dispersed to employees at all levels.

The learning community creates awareness about Information Management, and communicates the importance of building an IM discipline.



[IM Training](#)



[Custodian Center](#)

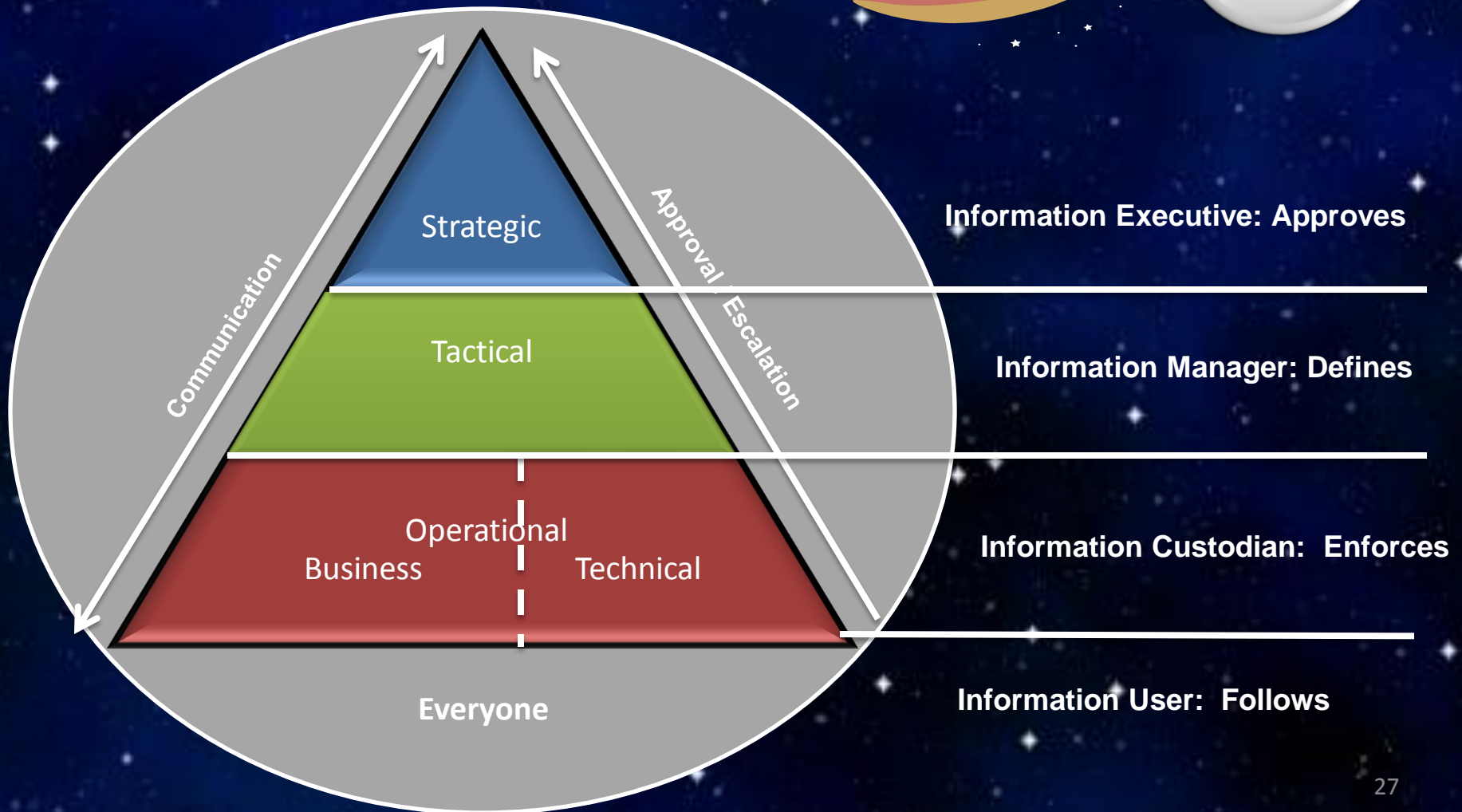


[Rate Your IM Skills](#)



[Site Map](#)

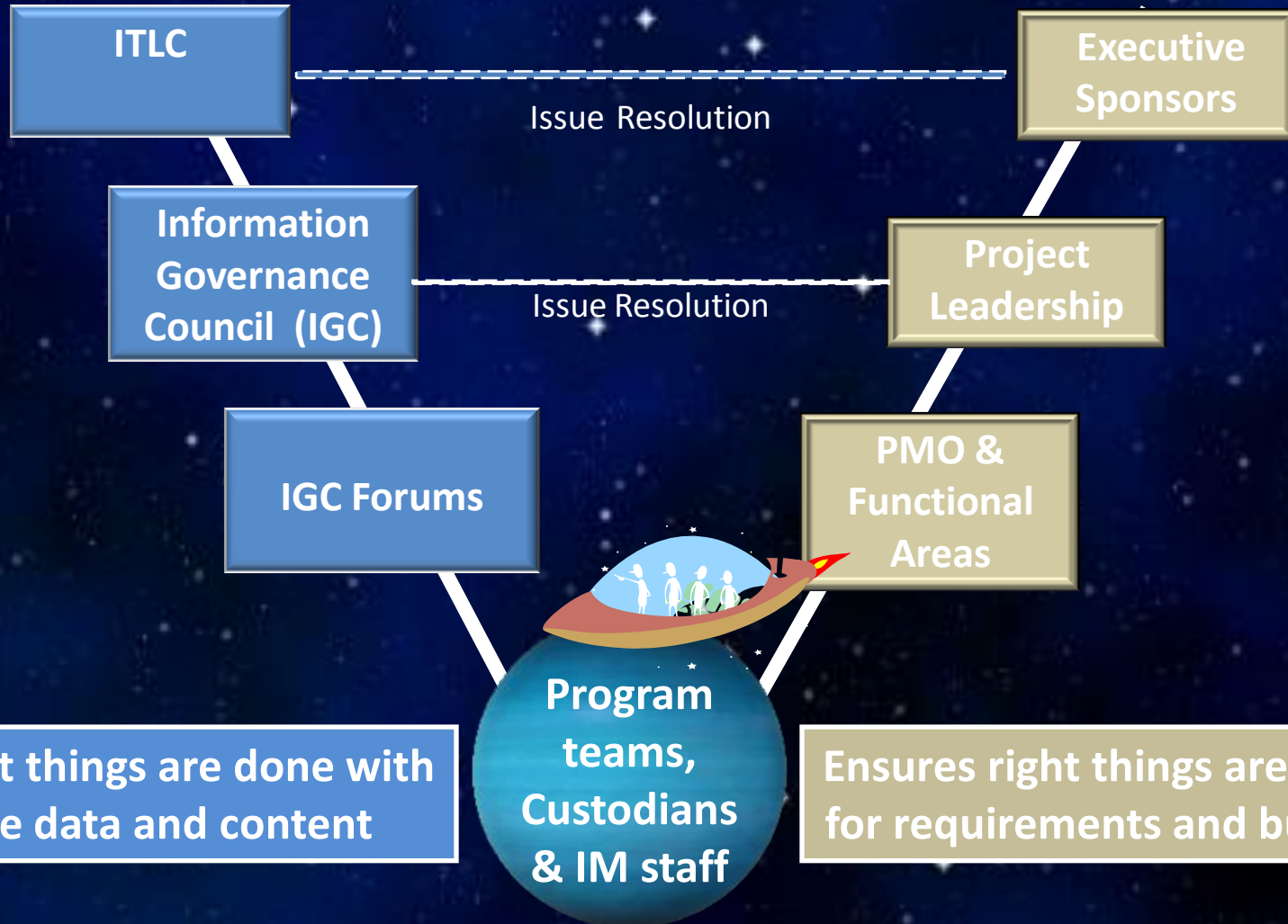
Moon Governance



Moon Governance

Enterprise Information Governance

Program/Project Governance



Ensures right things are done with Enterprise data and content

Ensures right things are done for requirements and budget

Moon Measurement



- ➔ **IM CERTIFIED! (Custodian Cadets)**
 - ➔ **Skill evaluation**
 - ➔ **Annual performance evaluation**
- ➔ **Audit (Everyone)**
 - ➔ **Custodian Center**
- ➔ **Inter-galactic Competition (Management)**
 - ➔ **Enterprise Footprint**

Post-Mission Debrief



- ➔ **Information is an ASSET**
- ➔ **Stewardship through DISCIPLINE**
- ➔ **Partnerships & Alliances**
- ➔ **Positioned for Compliance**
- ➔ **Visible support of Executive management**
- ➔ **FUN!**
- ➔ **It's a journey.... Not a destination!**

Future Mission??

- ➡ **Discover & Explore Planet SAP**
- ➡ **Explore Planet Semantic Web**
- ➡ **Uncover the ubiquitous galaxy of unified metadata**
- ➡ **Recruiting more SRP Cadets**

Questions?

A dark blue background with white stars and the Hebrew word 'מה?' (What?) repeated in various sizes and orientations.

Contact Us!

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