Enterprise Content Management (ECM)

Five Year Strategy Plan

May 11 2016

Metropolitan Council Management Committee

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Background

- What is Enterprise Content Management?
  - Strategies, methods, and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes (Association for Image and Information Management, 2016)

- Why is it important?
  - Internal processes impact direct service functions to the public

- 2014 ECM Strategy Committee Recommendation
  - Assessment of current state and future needs

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ECM Assessment 2015

- Interviews with 270+ staff across the organization
- Challenges and risks identified including:
  - Governance
  - Opportunity for Process Improvement
  - Limited Staff Resources
  - COOP Preparedness
  - Records Management/Data Practices
- Successes also exist
  - Internal and external efficiency gains
  - Improved utilization of space

Interviews By Division

- CD
- ES
- MT
- MTS
- RA

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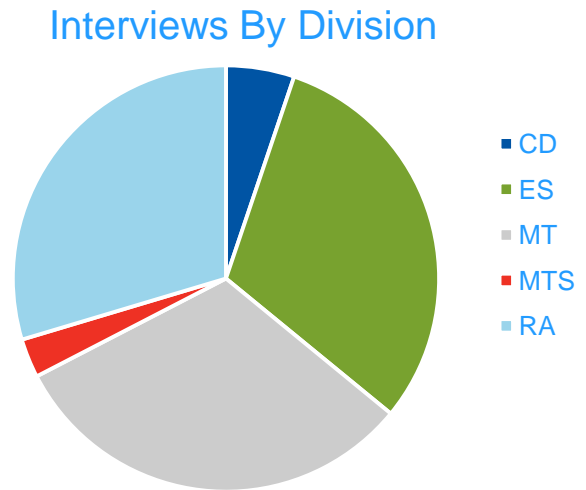
ECM 5 Year Strategy Plan

- Recognition of existing ECM challenges and risk
- Identification of three strategic objectives
  - Compliance
  - Access
  - Process Improvement
- Development of a long-term governance structure
- Analysis of current and future resource needs
- Creation of a five year framework/roadmap for ECM

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Strategic Objective: Compliance

The Metropolitan Council will manage records and content in a manner that supports all internal and external rules, regulations, policies, and best practices governing the management of records and content in a public organization.

Current Challenges: Outdated retention schedules, lack of staff knowledge/time to manage complex regulations

Future Initiatives

- Evaluation, update, and development of Council retention schedules

- Expand policies/procedures to securely manage content

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Strategic Objective: Access

The Metropolitan Council will support the open accessibility of applicable Council records to internal and external stakeholders, and develop internal policies, procedures, and processes to support this effort.

Existing Challenge: Information silos, lack of consistency in processes, large number of legacy systems

Future Initiatives
- Development and expansion of processes and structures to support Council-wide information sharing
- Implementation of an external portal for public access

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Strategic Objective: Process Improvement

The Metropolitan Council will develop and engage in business processes and procedures that support the accountable and efficient governance, management, and flow of content and information throughout the organization at all stages of its lifecycle.

Existing Challenges: Duplication of effort, paper-centered processes, need for best practices/governance model

Future Initiatives

- Expansion of document workflows, e-signature, e-forms
- Ongoing transition away from paper/ duplicate processes

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ECM and Thrive 2040

- Successful ECM Strategy Plan supports Thrive Outcomes and Principles
  - Stewardship, Equity, Sustainability, Integration, Collaboration, and Accountability

- Focus on Equity of Access
  - Knowledge is power
  - Increased transparency and citizen service
  - Expanded public engagement
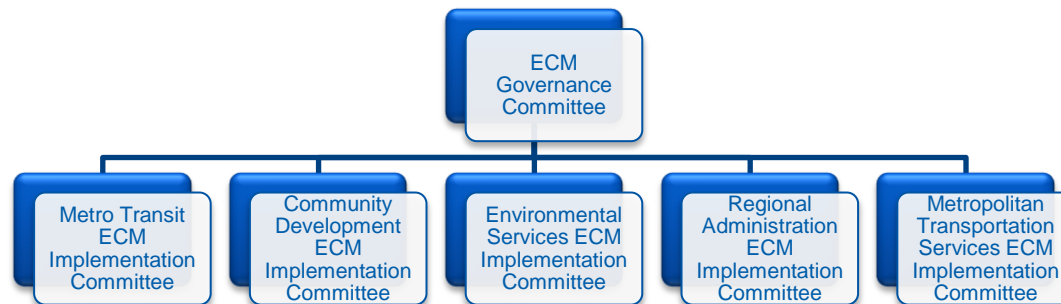
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Governance Committees

ECM Strategy Committee

- One representative from each division plus an IS liaison
- Not operational: Focus on aligning division strategies

Division-Level Implementation Committees

- Identification and prioritization of defined ECM projects

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                    ECM
                 Governance
                  Committee
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Metro Transit  Community  Environmental  Regional    Metropolitan
   ECM        Development  Services ECM  Administration  Transportation
Implementation   ECM      Implementation    ECM        Services ECM
  Committee   Implementation  Committee  Implementation  Implementation
              Committee                  Committee      Committee
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Current and Proposed Structure

Current ECM Department
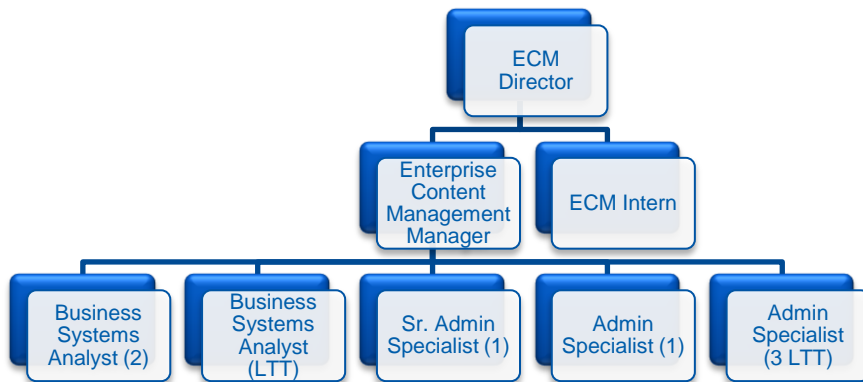
Total FTEs: 11

2021 ECM Department
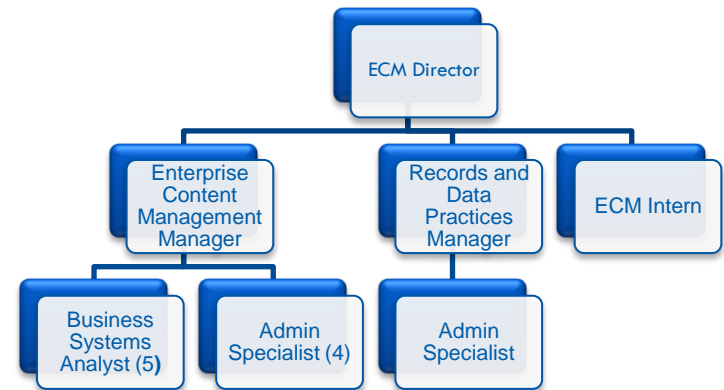
Total FTEs: 14

Staff Changes to Support Plan

- Conversion of three LTT Administrative Assistants (2016)
  - Ongoing department and division support for conversion projects
  - Cost neutral for 2016 and ongoing

- 2017 Budget Request: Records and Data Practices Manager
  - Support/guidance for complex records management processes
  - Facilitate compliance with state statutes and policies
  - Key contact for growing data practices issues and questions

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How Will We Measure Success?

- Thrive 2040 Perspectives
  - Are we increasing **collaboration** and **integration** between divisions and departments?
  - Is there improved **equity** in access to Council records for the community?
  - Are we decreasing our use of paper to support more **sustainability** in Council processes?
  - Do improvements in efficiency of processes enhance our **stewardship** of limited fiscal resources?

- Project-based ROI and outcome measurement

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Questions?

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