

~~CONFIDENTIAL~~  
Requirements and Technology Acquisition Working Group  
Charter

Purpose

The purpose of the ISB and its working groups as a whole is to improve the effectiveness of Agency information handling activities. The focus of our working group is the requirements process. In particular, we are to examine, with an Agency-wide perspective, the process of formulating, validating, coordinating, and transmitting Agency requirements for information handling services, and propose improvements where they are warranted.

Objectives

Our objectives, stated in order of importance, are as follow:

1. To examine critically the Agency information handling requirements process.
  - a) Identify major requirements functions, responsible components, and deliverables.
  - b) Identify shortcomings in the structure of the system and failings in the use of the system.
2. To make recommendations to the ISB for correcting any deficiencies in the requirements process, including recommendations for organizational changes that might be needed to overcome structural or operational problems, and produce a model requirements system.
3. To identify and address specific requirements as raised by the ISB, group members, and members of other working groups.

Scope of Work

For the Requirements Working Group's purposes, information handling systems of interest consist of, but are not limited to, electronic technologies, including text, data, voice, video, communications, imagery, and graphics, as well as related processes and services, included in the CIA Program.

Organization and Responsibilities

The Requirements Working Group is responsible to the ISB. Requirements Working Group members shall select a Chairman to serve at the pleasure of the group. The chairman will prepare the agenda for group meetings, be the group's spokesman, perform final editorial review on written material prepared by the group, and arrange for the taking of minutes of the working group meetings. The working group will forward minutes of its meetings to the ISB Executive Secretary and present its findings and recommendations to the ISB Chairman orally or in writing, at his discretion.

## GUIDELINES FOR AN OFFICE AUTOMATION (OA) DEVELOPMENT PLAN

1. Purpose: Office Automation development imposes a need to determine requirements and develop a formal plan. The initial planning effort requires two ad hoc organizational groups: a senior management steering committee and a planning team. The goal is to strive for overall management coordination and improved strategic planning that will result in a clear statement of short-term and long-term direction for office automation, data processing and telecommunications. The plan should describe the most cost-effective approach to meeting defined business needs. Planners should not attempt to utilize technology for its own sake or apply a philosophy of making the users a test-bed for the latest product announcements. The real objective of OA is not the installation of automated systems into an office environment, but the enhancement of the business objectives of the organization, using new technology only when and where it is appropriate. Development should proceed by following the steps and procedures listed below. Paragraphs a, b, and c contain procedures to follow which lead to preparation of the final plan described in paragraph d.

a. Attain effective senior sponsorship. Establish a senior management steering committee which sets goals and constraints for a plan and identifies potential members of a planning team.

b. Create a planning team. This group should include decision makers knowledgeable in office automation, data processing, telecommunications, the administrative support environment and key user departments.

(1) Conduct several short sessions and produce an overall picture (rough plan) of short-term and long-term direction. This is essentially a survey process, in which key segments of the organization are identified and business goals, information needs, and work processes are described. Figure 4 is a diagram showing items to be addressed in top-down strategy planning.

(2) Review the rough-cut plan with other key managers in order to verify assumptions related to business needs.

(3) The planning team should review the plan several times until it is satisfied with the high-level statement of objectives and scope for the OA development effort. Results of this review should identify key problems, potential solutions and performance paybacks.

(4) The plan and results of review should go back to the steering committee, which then decides whether to proceed with a further effort that will produce a more detailed definition of requirements and the initial systems design specification. The total plan would then be enhanced to include a proposed investment schedule, implementation milestones, and staffing/training needs.

c. Define the focus, objectives and scope for requirements definition.

The planning team efforts thus far will have provided a good idea of what major functions and support needs will be addressed in the short-term and what broad objectives have been defined for the long-term. Defining requirements may include any or all of the following basic steps:

(1) Form a requirements analysis group. This should consist of individuals whose background includes systems analysis skills, technical expertise and knowledge of the organization.

(2) Define objectives and scope. These can be stated in terms of broad needs (e.g., document processing support), the type of intended user (e.g., clerical staff), and an intended user group (e.g., Fleet Support Division). When objectives and scope have been clarified, evaluate the amount of time and number of people that can be devoted to defining requirements. Then determine where to concentrate efforts during the remaining steps.

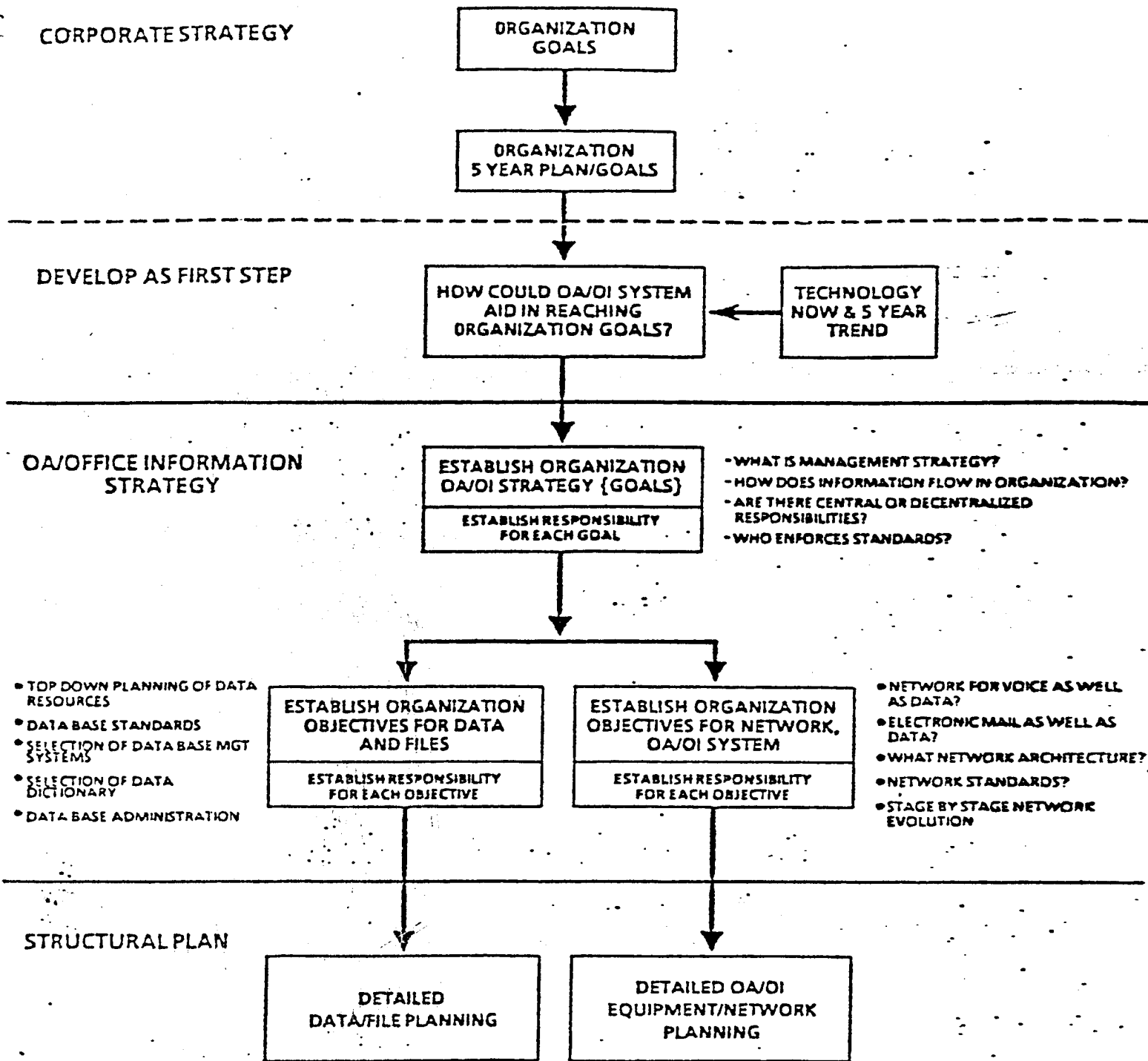
(3) Select study participants. To minimize time expended, select the smallest number of organizational units that are representative of those receiving the systems. Then select the smallest number of positions that need to be interviewed to provide a representative sample of the intended users.

(4) Gather information. This may be done using questionnaires and/or interviews. Both should be brief and focus only on areas of interest needed for the study. Replies should be analyzed and a summary made from the results. In order to simplify both requirements documentation and the construction of the plan, it is suggested that a copy of the activity's organization manual be used as a base. Inserts containing summarized systems requirements information can be placed next to each branch, division and directorate as applicable. This information should reflect decisions which address existing equipment as well as proposed needs.

d. Prepare development plan.

(1) The plan should consist of two parts: a report and a chart. Time savings can come from writing bullet-style rather than with excessive narrative prose. The report should succinctly describe requirements and systems configurations for satisfying short-term and long-term needs. Issues such as training, system administration and organizational impacts should also be addressed. By consolidating requirements information for each directorate, an overall blueprint can be constructed. The framework or backbone of the chart should be the information flow and communications network. Interface considerations for dissimilar equipment should be reflected. Protocol conversion and vendor-to-vendor communications between desk-top computers, multi-function workstations, mainframes and word processing equipment are critical to an organization's distributed resource network.

(2) Properly prepared, the development plan provides all the information required to prepare budget submits, make systems acquisition decisions, develop requests for proposal, and manage phased implementation milestones.



**STRATEGY AND PLANNING FOR OFFICE AUTOMATION**

Figure 4

(Adapted from a chart appearing in "Design and Strategy for Distributed Data Processing", James Martin, Prentice-Hall, 1981)