



ISO 38500 Foundation Class

Business Oriented Governance of Information Technology

Content detail

Foundation Class Structure and Content

This sheet adds detail to the ISO 38500 Foundation Class Overview, by describing the content of the 24 modules as they are organised into eight sessions. Each day comprises four sessions – with morning, lunch and afternoon breaks on each day.

Session 1 - Setting the scene

- Module 1: Introductions and Objectives;
- Module 2: The Gimli Glider Case Study: A metaphor for governance of IT;
- Module 3: Experiences of failure in Governance of IT;

In Module 1, we share our background and interests, to help prepare us for working together and exploring issues through the next two days.

Module 2 explores an airliner crash. At first one might say that it has little to do with IT, but it is immensely instructive on the factors that lead to problems with IT-enabled change. Participants gain a new technique for illustrating IT issues through the use of analogy. Participants are expected to read a brief paper in preparation for this session.

Module 3 looks at situations where a range of IT issues has resulted in significant impact on the business and its stakeholders.

Session 2: Base Concepts

- Module 4: The difference between "IT Governance" and "Governance of IT";
- Module 5: Business systems and technology enabled change;
- Module 6: Base concepts for Governance of IT;
- Module 7: Key messages in ISO 38500;

"IT Governance" has become a very confused concept – with diverse definitions and meanings sometimes based in academic rigour but often focused more on vendor product. This session builds a common and consistent understanding of the definition provided in ISO 38500, and establishes the foundations for an effective approach to governing IT

Modules 4 and 5 draw from a series of authoritative academic sources to establish a clear perspective on the role of IT in business and the fundamental distinction between governance and management.

Module 6 builds on these concepts to clearly position the role for corporate governance of IT and to relate this to the management tasks that are well defined in frameworks like CobiT and ITIL.

Module 7 drills into seven fundamental messages about governance and responsibility that are woven into the fabric of the standard.

Session 3: The Governance Model

- Module 8: The Evaluate-Direct-Monitor Model;
- Module 9: Using ISO 38500 to assess and improve corporate governance of IT;
- Module 10: Preliminary Self-assessment;

ISO 38500 is only 15 pages long, but contains a wealth of advice.

Module 8 concentrates on the tasks for governance. We explore the way that governing bodies actually operate, and build a deeper understanding of the role of management in completing the governance tasks.

Module 9 lays the foundation for understanding how to use the standard, prior to the first of seven steps in the self-assessment process.

In Module 10, class participants undertake and briefly discuss a 12 point preliminary assessment of governance arrangements in their own organisations.

Session 4: Introducing the Principles

- Module 11: The concept of Principles;
- Module 12: The Responsibility Principle;

Principles guide behaviour and decision making. ISO 38500 defines six principles. In this session, participants will discover that responsibility for IT cannot be narrowly defined – and that success with IT depends on proper allocation and discharge of responsibility.

Module 11 ensures that participants in the class are "on the same page" in terms of understanding the purpose of principles.

Then in Module 12, we begin exploring the most significant elements of the standard, to understand the extent to which proper assignment and understanding of responsibility is critical in every step of planning, building and running IT-enabled business capability. In particular, this session brings into focus the significant responsibilities of those who control the business that uses IT, marking the distinction between this responsibility and that of the people who actually supply the IT capability. Module 12 includes a 12 point self-assessment of how each participant's organisation conforms to the responsibility principle.

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Session 5: Principles 2 & 3

Module 13: The Australian Customs Service Case Study;

Module 14: The Strategy Principle;

Module 15: The Acquisition Principle;

After warming up on a case study, the class continues to build understanding of the six principles for effective governance of IT.

Module 13 drills into the behaviours that resulted in a significant IT failure that had major national economic consequence.

Module 14 explores the Strategy Principle to reveal the many dimensions of strategy and planning that must be addressed to ensure that IT is truly aligned to business need.

Module 15 looks deeply into how organizations make decisions to spend on IT, and will discover opportunities to resolve many gaps that commonly exist in this area. It emphasises that the Acquisition Principle applies to all allocation of resources to use of IT.

In each of modules 14 and 15, class participants continue self-assessment of their organization's conformance with each principle.

Session 6: Principles 4, 5 & 6

Module 16: The Performance Principle;

Module 17: The Conformance Principle;

Module 18: The Human Behaviour Principle;

This session completes the in-depth review of the principles, along with the self-assessment, for which results are reviewed in the final session.

Module 16 looks at the intent of the performance principle – achieving intended business outcomes – and the matters that require attention in this context.

Module 17 explores the types of formal rules that are in scope for the conformance principle, and approaches that organizations might use to achieve its intent.

Module 18 opens up the many dimensions of Human Behaviour that can impact on success with use of IT. It explores how diverse human communities exhibit behavioural traits that can significantly affect the level of success that organizations have with information technology.

Preparatory Reading

Participants in the Foundation Class are expected to prepare for Day 1 by reading a 6 page article on the Gimli Glider. Web links are provided as part of the joining instructions. Preparation for day 2 involves reading a paper describing the events leading up to and during the deployment of a new system for managing imports by the Australian Customs Service.

Session 7: Applying ISO 38500

Module 19: Using Policy to implement principles;

Module 20: Case Study: Practical application of ISO 38500 in Tertiary Education;

Principles are intended to guide behaviour. In Module 19 we look at how the principles can be brought to life within individual organization through the development of policy at the strategic level.

The Module 20 case study looks at how a tertiary education institution has employed ISO 38500 as the guide to a major overhaul of its approach to directing and controlling its use of information technology. We follow the transformation project from inception to completion, looking at the results of the initial assessment, the key policies established to drive new behaviours, and the organizational structures that were established to put the business leaders firmly in control of the IT agenda while empowering the IT department for maximum performance. We see the major challenges and the approaches that were used to solve them.

Session 8: Action Planning

Module 21: Building on the self-assessment;

Module 22: Sponsorship for change;

Module 23: Easy steps to adoption;

Module 24: Making fundamental change.

Those who attend this workshop may wish to begin adopting ISO 38500 in their own organizations. This final session draws together the knowledge gleaned from the overall workshop, to help participants prioritise and focus their efforts.

Module 21 presents anonymously the results of the self-assessment and briefly discusses highlights.

Module 22 looks at the nature of change that can be associated with adopting an ISO 38500 approach to governance of IT and explains why active top level sponsorship is critically important.

Module 23 identifies ways in which the ISO 38500 principles can be introduced in a low-key way to begin building awareness and understanding of their value.

Module 24 concludes the class by revisiting key considerations in planning and delivering an ISO 38500 approach to governance of IT.

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