OMG Standards in Government & NGO's Workshop
July 13-15, 2009, Westin Arlington Gateway, Arlington, VA USA

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Full Conference:

STANDARD FEE: **US$250.00**
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Daily Fees:

STANDARD FEE: **US$150.00**
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Fee includes sessions, proceedings CD, lunch and refreshments daily and the workshop reception.

success

OMG Government Domain Task Force Workshop

Tuesday & Wednesday, July 14-15, 2009

This is a two-day workshop focused on two of the principal areas of standards activities involving industry and government collaboration in the Government Task Force.

The objectives of the Government DTF Workshop are twofold:

- Inform the government community of the activities of the OMG in collaboration with the government sector.
- Receive feedback to guide its activities and roadmap of planned activities.

The Workshop will focus on the two areas of greatest activity, spending one day on each.

OMB/OMG Collaboration Agenda
The President's Office of Management and Budget (OMB) has been working with the OMG for several years. The OMB brought the Federal Transition Framework to the OMG and successfully defined an interchange standard using OMG's Model Driven Architecture approach. Over the last year the collaboration has turned to the Metamodel for Federal Segment Architecture (MFSA). MFSA originally was begun to support the Federal Segment Architecture Reporting Template; however, it became clear that a larger view is necessary. There are overlapping semantics in a number of areas in the OMB: Segment Architecture, Federal Transition Framework, OMB 300, Exhibit 53, and the Consolidated Reference Models. These pieces have been defined separately and differences in interpretations and details have occurred. This effort is intended to bring all of these pieces under a single semantic umbrella where they overlap.

Electronic Records Management Services
An Interagency Project Team of 19 Federal Agencies facilitated by the National Archives and Records Administration (NARA) published "Functional Requirements, Attributes, and Unified Modeling Language Class Diagrams for Records, Management Services, September 7, 2006." NARA subsequently took these requirements to the OMG to serve as the basis for a Records Management Services specification. During the last week of March 2009, the OMG approved the Alpha version of that standard. This specification will be brought through Beta to Formal V1.0 status using OMG's Community Consensus Process. However, NARA, the OMG and other agencies believe this standard to be a beginning. It has a road map of additional specifications to provide functionality not addressed in this initial specification.

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About the Object Management Group
OMG is an international, open membership, not-for-profit computer industry consortium. OMG Task Forces develop enterprise integration standards for a wide range of technologies, including: Real-time, Embedded and Specialized Systems, Analysis & Design, Architecture-Driven Modernization and Middleware and an even wider range of industries, including: Business Modeling and Integration, C4I, Finance, Government, Healthcare, Legal Compliance, Life Sciences Research, Manufacturing Technology, Robotics, Software-Based Communications and Space.

OMG's modeling standards, including the Unified Modeling Language™ (UML®) and Model Driven Architecture® (MDA®), enable powerful visual design, execution and maintenance of software and other processes, including IT Systems Modeling and Business Process Management. OMG's middleware standards and profiles are based on the Common Object Request Broker

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Architecture (CORBA®) and support a wide variety of industries.

More information about OMG can be found at www.omg.org. OMG is headquartered in Needham, MA, USA.

Last updated on June 29, 2009 by Mike

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TUESDAY - July 14, 2009 - OMB/OMG Collaboration Agenda

09:00 – 09:15   **Welcome & Opening Remarks**
Dr. Richard Soley, Ph.D.
Chairman & CEO Object Management Group

09:15 – 10:00   **Keynote Presentation**
Kshemendra Paul
Chief Architect, President's Office of Management and Budget

10:00 – 10:30   **OMB/OMG Collaboration Overview**
Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force

An Overview is provided of past & present collaborative activities undertaken by the OMG, OMB, and other government agencies to improve the communication among the OMB and U.S. Federal Government Agencies. The overview will include the approach taken to assure independent but synchronized and mutually informed governance of the OMB and the OMG processes. The governance model serves as a template for government work in the OMG and was evolved from extensive collaborative work done by the National Archives and Records Administration in the OMG.

10:30 – 10:45   Morning Refreshments

10:45 – 11:30   **The State of the Practice in Federal Enterprise Architecture**
John Teeter
Deputy CIO, Department of Health and Human Services

This presentation and discussion will trace the history of Federal EA practices and the rationale for the evolution of that practice. Challenges and successes will be explored with a focus on cross governmental information sharing needs. The driving need for standardized approaches, metamodels and tool sets for future Federal enterprise architecture needs will also be discussed.

11:30 – 12:30   **OMB-OMG Collaboration Case Study: The Metamodel for Federal Segment Architecture**
Bob Daniel
CTO, Government Sector, Troux Technology

In 2008, the OMB FEA PMO came to the Object Management Group's (OMG) Government Domain Task Force (GovDTF) asking that it formalize the EA Segment Report as an OMG metamodel specification. A similar specification had been developed through the GovDTF for the Federal Transition Framework (FTF). The GovDTF performed an analysis of the EA Segment Report and related data model. It concluded that the scope of the activity should be expanded to the formalization of a segment architecture metamodel of broader scope, encompassing elements of FEA including the CRM, FTF, and aspects of CPIC. A team comprised of representatives from the FEA PMO, agencies and the OMG vendor community was formed to develop the Metamodel for Federal Segment

Architecture (MFSA) specification. This presentation describes the work of that team, the metamodel specification produced, its relationship to the Federal Segment Architecture Methodology, and its support of FEA PMO analysis and reporting objectives.

12:30 – 13:30	Lunch

13:30 – 14:15   **Imagine the Possibilities**
George Thomas
Director, Enterprise Architecture Division, General Services Administration

Mr. Thomas will provide an overview of the "as-is" in the interactions among the agencies and the OMB and discuss the "could-be", i.e., how the new environment could look when streamlined under an expanded portfolio of standards. This will "set the scene" for the panel discussion in which presenters and other panelists discuss what standards might be added to the OMB/OMG Collaboration Agenda to transform the "could-be" to "will-be".

14:15 – 14:30	Afternoon Refreshments

14:30 – 15:30   **Panel Discussion: Furthering the OMB/OMG Collaboration Roadmap**

Facilitator:

John Butler
Everware-CBDI, Co-chair, Government Domain Task Force

Panelists:

Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force
Bob Daniel
CTO, Government Sector, Troux Technology

- additional panelists TBD

15:30	Adjourn
18:00 – 20:00	Welcome Reception in Demonstration Area

WEDNESDAY - July 15, 2009 - Records Management Services

09:00 – 09:15   **Welcome & Opening Remarks**
Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force

09:15 – 10:00   **Keynote - NARA and the Exploration of New Technology Through Records Management Services**
Dr. Michael Kurtz
Assistant Archivist for Records Services, Washington, DC, National Archives and Records Administration

As we fulfill our role as the nation's record keeper, the National Archives and Records Administration has long recognized the challenge presented by the wide variety and enormous volume of electronic records being created by the Federal government. We have been working for more than a decade to meet that challenge by developing leading-edge preservation systems that will protect and provide access to the records as we receive them.

However, we also understand another facet of the same problem: that our customers, the agencies of the Federal government, face comparable challenges as they endeavor to manage the electronic records they create and rely upon for their own business processes. Our work with OMG and the Records Management Services project is enabling us to explore and evaluate exciting and efficient new methods of managing such records based on the modularity and flexibility that can result when software is implemented as services.

10:00 – 10:30 **Records Management Services Specification; How Did We Get Here?**
Daryll Prescott
Former RMS Program Director, Electronic Records Archive Program, National Archives and Records Administration

A look backward as we move forward in the world of electronic records. 19 agencies came together to accomplish a mission that was thought to be impossible; agree upon requirements for electronic records. The rules, the players, the process and the ongoing outcome will be presented in order to understand how it happened and why it is still going.

10:30 – 10:45 Morning Refreshments

10:45 – 11:30 **Records Management Services Standard, an Overview**
Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force

Under contract to the National Archives and Records Administration (NARA), Larry facilitated the Joint Records Management Services Submission Team (JRMS) that produced the RMS standard. JRMS was a coalition of government, industry, and academic representatives. The presentation provides an overview of how the specification was defined using Model Driven Architecture. The specification began with the functional requirements produced by a 19 agency inter-agency project team facilitated by NARA. The modifications, extensions and elaborations required to produce a semantically precise specification are discussed.

11:30 – 12:15 **Is Records Management Serviceable in Cyberspace?**
Kenneth Thibodeau
Director, Electronic Records Archive Program, National Archives and Records Administration

The discipline of records management developed in the context of hard copy information technology. Its basic concepts and methods are deeply rooted in that technology; for example, assuming that a record is no different than the paper on which it is written. The new dimension opened up by digital technology forces a reassessment and reformulation of records management, starting with the very nature of records and aiming at maximizing the value that records management adds in the conduct of business.

12:15 – 13:15 LUNCH

13:15 – 13:45 **The Future of Records Management**
Bill Manago, CRM
Director, Records Management Practice, CA, Inc.

The co-author of the DoD 5015.2 Records Management Specification will give us a view into upcoming changes in technology, standards, and best practices that will impact your records and information management programs. This discussion will conceptualize how changes in technology, practices, and standards can be used to streamline and improve your records management program. Get insight into:

- NARA's big-buckets vs little buckets directive
- Records Management Services standards development
- The Impact of Information Governance
- The Impact of E-Discovery Requirements
- The Impact of Social Networks
- RMA interoperability requirements

13:45 – 14:15   **Records Management Services in a SOA Environment**
Melvin Greer
SOA Chief Architect, Lockheed Martin

The Records Management Services can be implemented via the use of a SOA framework. Melvin Greer's session will discuss how a SOA framework can support the implementation of Records Management Services and how agencies can accelerate a lifecycle records management requirements capability with a high degree of flexibility and at a lower cost. This session will also discuss impact of adding the records management service to the agency Service Reference Model.

14:15 – 14:30 Afternoon Refreshments

14:30 – 15:00   **Enabling Records Management Services as part of a Service Foundation**
Victor Harrison
Director, Distinguished Engineering Group, CSC

There are a number of services that are necessary for sucessful enablement of a services environment: Messaging, Discovery, Logging, Cross-environment dispatching, etc. CSC has developed such a framework of technology and implementation agnostic foundational services, called the SOAssure Foundation, and are using it as the basis for enabling services environments. It is our intention to connect OMG's Record Management Service as a part of this framework resulting in the offering a common gateway to records management service implementations from vendors that implement the enablement of the JRMS specification.

15:00 – 16:00   **Panel Discussion: Records Management Services: Present and Future**

Facilitator:

John Butler
Everware-CBDI, Co-chair, Government Domain Task Force

Panelists:

Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force
Kenneth Thibodeau
Director, Electronic Records Archives Program, National Archives and Records Administration
Victor Harrison
Director, Distinguished Engineering Group, CSC
Bill Manago
Director, Records Management Practice, CA
Melvin Greer
SOA Chief Architect, Lockheed Martin

16:00   Adjourn

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Speaker Bios

John Butler
Everware-CBDI, Co-chair, Government Domain Task Force

Mr. Butler is Chief Architect for Everware-CBDI providing consulting services in the areas of Service Engineering and Architecture (SAE), Model Driven Architecture and Development (MDA and MDD), Enterprise Architecture, and Legacy Modernization. He is co-inventor of patented technology for model-based frameworks in the Integrated Justice domain and has developed numerous solutions and frameworks for clients in the public sector and a wide variety of private sector industries including manufacturing, insurance, mortgage, healthcare, pharmaceuticals, defense, automotive, and power generation. Mr. Butler Co-Chairs the Government Domain Task Force within the Object Management Group (OMG) and has 20 years of broad information systems and business modeling experience.

Bob Daniel
CTO, Government Sector, Troux Technology

Bob Daniel is the CTO, Government Sector, for Troux Technologies. In that role he leads the specification of product offerings and practices supporting the government sector and has been active in the deployment of large-scale enterprise architecture-based strategic IT planning solutions for both government and commercial organizations. As Troux's representative to the Object Management Group (OMG), he participates in the Government Domain Task Force and Business Architecture Working Group. He participated in the development of the Metamodel for Federal Transition Framework specification and chairs the team developing the Metamodel for Federal Segment Architecture specification.

Melvin Greer
SOA Chief Architect, Lockheed Martin

Melvin Greer is Senior Research Engineer, SOA Chief Architect, and the Director SOA Competency Center, Lockheed Martin, Advanced Technologies Office. With over 20 years of systems and software engineering experience, he functions as a principal investigator in advanced research studies. He significantly advances the body of knowledge in basic research and critical, highly advanced engineering and scientific disciplines. Mr. Greer is a Strategist on the Information Technology Association of America, Cloud Computing Committee and a member of the Government Cloud Computing Community of Interest.

In addition to his professional and investment roles, Mr. Greer is a Certified Enterprise Architect, Fellow and Adjunct Facility at the Federal Enterprise Architects Institute, and member of International Monetary Fund / World Bank, Bretton Woods Committee. Mr. Greer is a frequent speaker at conferences and universities and is an accomplished author. "The Web Services and Service Oriented Architecture Revolution" is his most recently published book.

Greer received his Bachelor of Science degree in Computer Information Systems and Technology and his Master of Science in Information Systems from American University, Washington, D.C. He has also completed the Executive Leadership Program at Cornell University, Johnson Graduate School.

Victor Harrison

Director, Distinguished Engineering Group, CSC

Mr. Harrison leads CSC's public sector Distinguished Engineering Group, is a member of the Board of Directors of the Object Management Group, and is also a member of the Advisory Board of the SOA Consortium. In these capacities he provides leadership to CSC's engineering community, CSC's customers, and to the industry as a whole. During his 35+ year career he has provided technical director, chief architect, or chief engineer services to nearly one hundred different organizations ranging from commercial enterprises, public sector agencies, Department of Defense departments, Intelligence Community members, and software vendors.

Some highlights of Mr. Harrison's career include Chief Architect of multiple enterprise-wide transformational programs; creation of the STORM executable SOA reference implementation used on a number of SOA engagements; design and specification of the advanced version of DISA's SOA Foundation services, design and delivery of a custom supply chain system; technical director for a software company; and the development of agile and service-oriented methodologies in use for specific DoD and IC members. Mr. Harrison has been published in numerous magazines, has spoken at numerous conferences, holds a patent (pending) for a System and Method for Architecting Pattern Based Models Within a Governmental Framework, and is an acknowledged SOA expert within the industry. He has been invited by a number of agencies and organizations to provide guidance and assessment on topics ranging from SOA design and governance to the portability and reusability of software and hardware designs. His current professional interests include modeled correctness of service oriented architecture design characteristics, event-driven SOA, concurrent engineering, feature-based delivery, and dynamic ontologies.

Larry Johnson
TethersEnd Consulting, Co-chair, Government Domain Task Force

TethersEnd Consulting is the individual consultancy of Larry L. Johnson, providing services focusing on Systems Architecture and the management of the Collaborative Environment needed to develop and support it. TethersEnd is built on an extensive background of experience in large Enterprise Systems supporting Government, Engineering and Manufacturing environments in both commercial and defense sectors. Mr. Johnson has been a member of the Object Management Group since 1993 and currently is Co-chair of the OMG's Government Domain Task Force, and serves on its Board of Directors. He led the team that produced the recently adopted OMG standard in Records Management Services. He has been guiding firms in the Collaborative Development of Enterprise Systems Architecture and Product Architecture in large corporate and multi-corporate settings for over 25 years. Prior to establishing TethersEnd he was Implementation Architect, and then Chief Architect at MSC Software for 6 years, and was Member, Group Technical Staff at Texas Instruments serving as CAD/CAM/CIM Architect for 15 years.

Dr. Michael Kurtz
Assistant Archivist for Records Services, Washington, DC, National Archives and Records Administration

Dr. Kurtz joined NARA in 1974 and has worked in a variety of archival and management positions. He also serves as an adjunct professor at the University of Maryland's College of Information Studies, where he teaches a course on the management of cultural institutions. Dr. Kurtz received his B.A. degree (1972) in history from The Catholic University of America, and his M.A. (1974) and Ph.D. (1982) in modern European history from Georgetown University. Dr. Kurtz has published articles and monographs in the areas of archival management and American history, with an emphasis on the Civil War, World War II and the post-war era, and religious and cultural history.

Bill Manago, CRM
Director, Records Management Practice, CA, Inc.

Bill is Director, Records Management Practice at CA, Inc, the provider of CA Records Manager, formerly MDY FileSurf, a full featured electronic records management system. Prior to joining CA and MDY, Bill was employed at the US Department of Defense (US Army and Defense Information Systems Agency's Joint Interoperability Test Command) for 21 years, where he co-authored DoD5015.2-STD, the "Design Criteria Standard for Records Management Applications" and established the JITC's Records Management Certification Test Facility. Bill currently oversees the functional development of the CA Records Management system and provides records management best practices consulting services to leading government, legal, and corporate organizations. Bill is a leading authority on electronic records management standards.

Kshemendra Paul
Chief Architect, President's Office of Management and Budget

Kshemendra Paul is Chief Architect, Office of Management & Budget, Executive Office of the President. In this role, Kshemendra is responsible for leading efforts around the Federal Enterprise Architecture (FEA). In this role, Kshemendra defines policy, guidance, and processes for agency enterprise architecture (EA); mentors and coaches agencies in their efforts; conducts oversight and assessment of agency completion, use, and results from their EA; works closely with the Federal CIO Council and in particular its Architecture and Infrastructure Committee; and provides the bridge at OMB between the FEA and information technology management and oversight, overall mission performance management, policy, and resource allocation. The scope of this role is the entire Federal Government with an annual IT spend plan of approximately seventy billion dollars. The purpose of the FEA is to ensure that our Federal IT investments are as transformative as possible in terms of being the critical enabler of a result-oriented, citizen-centered, and market-based Federal government.

Previously, Kshemendra served as Chief Architect for the U.S. Department of Justice (DOJ) and was also the Program Executive for the National Information Exchange Model (NIEM). In this role he led efforts around data standards and inter-operability across Federal, State and Local stakeholders. In particular, Kshemendra took a leadership role with the counter-terrorism, law enforcement, and homeland security Information Sharing Environment (ISE) and the development of its architectural framework and profile. This resulted in the adoption of NIEM as the basis for ISE information sharing.

Kshemendra also served as the Co-Chair of the Services Subcommittee of the Architecture and Infrastructure Committee, where he was part of the team leading the development of the Practical Guide to Federal Service Oriented Architecture.

Kshemendra was honored with the Federal 100 award for his leadership with NIEM. This award recognizes the top executives from government, industry and academia having the greatest impact on the government information systems community. He and the other Federal members of the NIEM management team were also recognized with the Collaboration Award by the DOJ Justice Management Division.

Mr. Paul has over 23 years of experience in strategic planning, enterprise architecture, organizational management and systems development. Before joining the civil service in 2005, Mr. Paul was Group Architect and Product Manager with the Financial Industry Regulatory Authority (previously NASD). Prior to that, he was an active entrepreneur, co-founding LocalEyes (sold to AOL) and founding Andelina (sold to FoundryOne). He has participated as a member of senior management for a variety of other technology product and service companies.

He holds both Bachelor's and Master's Degrees in Electrical Engineering, and an additional Bachelor's degree in Mathematics, from the University of Maryland, College Park.

Daryll Prescott
Former RMS Program Director, Electronic Records Archive Program, National Archives and Records Administration

Mr. Prescott hold a graduate degree in computer systems and has held several prestigious positions including faculty at Georgia Institute of Technology. He has worked for many agencies over his thirty years of service in the government and was one of the three original authors who published a technical specification that was adopted by the Department of Defense and would become the DoD 5015.2 Electronic Records Management Software Applications Design Criteria Standard, now in its third version.

Dr. Richard Soley, Ph.D.
Chairman & CEO Object Management Group

As Chairman and CEO, Dr. Soley is responsible for the vision and direction of the world's largest consortium of its type. Dr. Soley joined the nascent OMG as Technical Director in 1989, leading the development of OMG's world-leading standardization process and the original CORBA® specification. In 1996, he led the effort to move into vertical market standards (starting with healthcare, finance, telecommunications and manufacturing) and modeling, leading first to the Unified Modeling Language (UML®) and later the Model Driven Architecture (MDA®).

Previously, Dr. Soley was a cofounder and former Chairman/CEO of A. I. Architects, Inc., maker of the 386 HummingBoard and other PC and workstation hardware and software. Prior to that, he consulted for various technology companies and venture firms on matters pertaining to software investment opportunities.
Dr. Soley has also consulted for IBM, Motorola, PictureTel, Texas Instruments, Gold Hill Computer and others. He began his professional life at Honeywell Computer Systems working on the Multics operating system.

A native of Baltimore, Maryland, U.S.A., Dr. Soley holds the bachelor's, master's and doctoral degrees in Computer Science and Engineering from the Massachusetts Institute of Technology.

John Teeter
Deputy CIO, Department of Health and Human Services

John Teeter is the Deputy Chief Information Officer and former Chief Enterprise Architect for the U.S. Department of Health and Human Services (HHS). In this role, he is responsible for all aspects of information resources management including several enterprise programs which include information technology strategic planning and performance management, information technology capital planning and investment control, enterprise security and the development, maintenance and use of the HHS enterprise architecture. John has served HHS for over 26 years in various capacities.

Kenneth Thibodeau
Director, Electronic Records Archive Program, National Archives and Records Administration

Dr. Kenneth Thibodeau is Director of the Electronic Records Archives (ERA) Program at the National Archives and Records Administration (NARA), U.S. Dr. Thibodeau has over 30 years experience in archives and records management, and is an internationally recognized expert in electronic records. He has served as Chief of the Records Management Branch of the National Institutes of Health, Director of the Center for Electronic Records at NARA, and Director of the Department of Defense Records Management Task Force, where he led development of the DoD standard for records management applications. He earned a Ph.D. in the history and sociology of science from the University of Pennsylvania, and held several post doctoral fellowships in computer science. He has contributed to several national and international collaborations, including the Digital Curation Curriculum project, the InterPARES project, and the ISO Open Archival Information System standard and Records Management standard. In 2008, Dr. Thibodeau received the Emmett Leahy Award for outstanding contributions to the information and records management profession and was given a Lifetime Achievement Award by the Archivist of the United States for pioneering contributions moving the National Archives to the forefront of e-government. He has been a visiting professor and lecturer at universities in the U.S., Canada, France, Germany, Italy, and Scotland. A Fellow of the Society of American Archivists, he has published over 30 papers and spoken at more than 100 conferences around the world.

George Thomas
Director, Enterprise Architecture Division, General Services Administration

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