

e-Services Project Services List Framework



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September 2001

TABLE OF CONTENTS

Document Control Error! Bookmark not defined.

Change Log Error! Bookmark not defined.

FRAMEWORK OVERVIEW

ERROR! BOOKMARK NOT DEFINED.

The Service List Overview Error! Bookmark not defined.

Services List Framework Approach **5**

Introduction 6

Stage 1: Scoping & Mobilisation 6

Stage 2: Services Definition/Description 6

Stage 3: Customer Services Grouping 6

Stage 4: Implement 6

Stage 1 : Scoping and Mobilisation (SM) **7**

Description 7

Deliverables 8

Stage 1: Scoping & Mobilisation Stage (SM): Tasks/Resources 9

Stage 2 : Services Definition and Description **11**

Description 11

Deliverables 12

Stage 2: Service Definition & Description (SD): Tasks & Resources 13

Stage 3: Customer Services Grouping **16**

Description 16

Deliverables 17

Stage 3: Customer Services Grouping (CSG): Tasks & Resources 18

Stage 4: Implement	21
Description	21
Templates & Tools	21
Deliverables	22
Stage 4: Implement (IM): Tasks & Resources	23
APPENDIX A : THE FRAMEWORK TEMPLATES	25
Introduction to the Templates	25
Service List Tool Set	25
Introduction	Error! Bookmark not defined.
Functions of tabs on the Service List tool	Error! Bookmark not defined.
Agency Terms of Reference Template	26
E-Services Readiness Assessment Templates	26
APPENDIX E – AGENCY SERVICE LIST PLANNING	27
Description	27
Deliverables	28
Agency List Planning (AL): Tasks & Resources	29

The Services List Overview

Introduction

The framework is designed to enable public sector agencies to easily identify and describe all services provided by government agencies and crown owned enterprises. It provides the approach to follow, a set of tools including templates, and a Service List Tool Set with which to capture services data.

This is an interim tool, which will ensure consistency in service description across agencies. The tool also facilitates subsequent analysis for identification of e-enabling and integration opportunities.

The E-Government Unit will provide training in the framework.

Other Volumes in this series

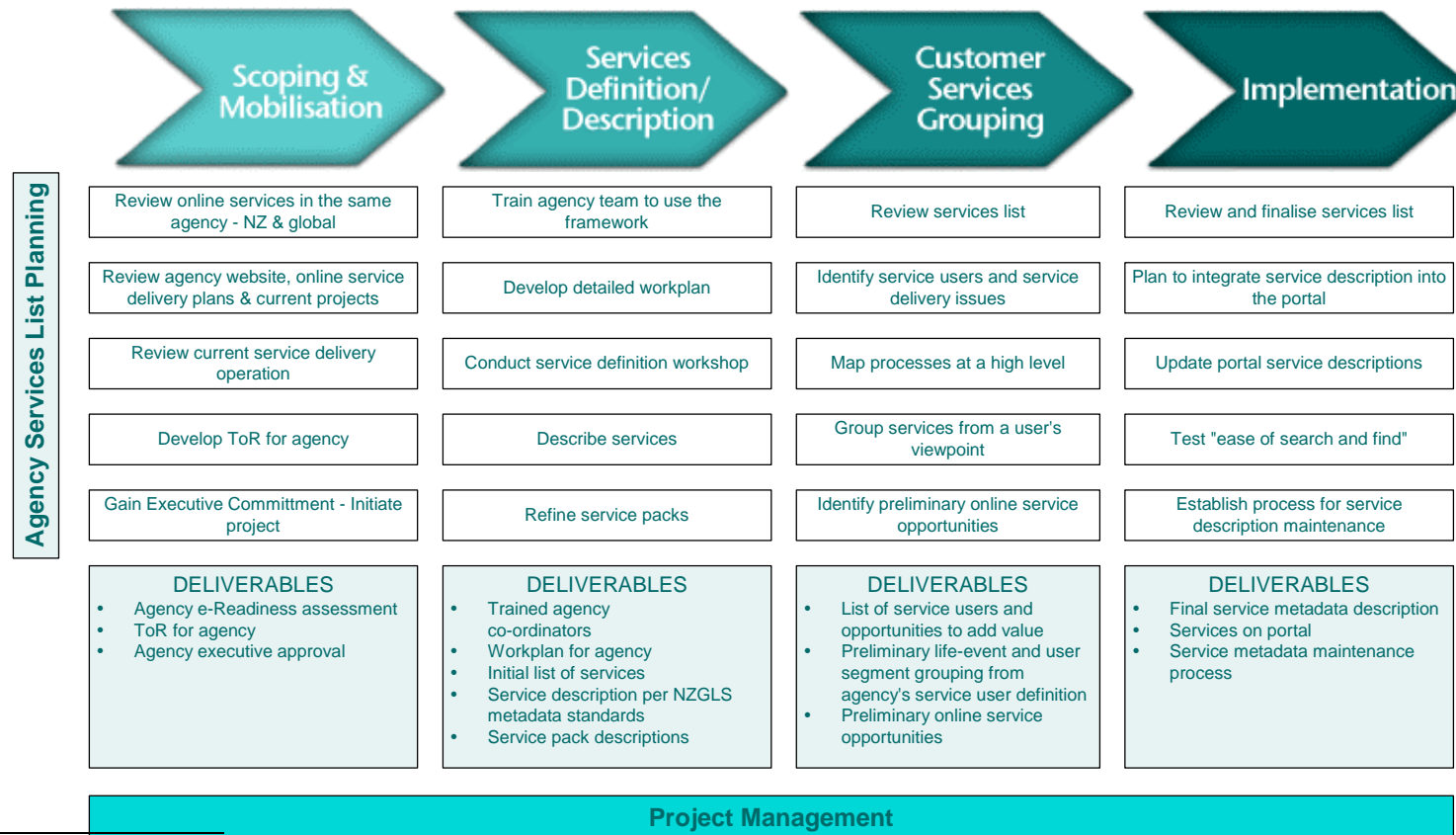
This is the second of a set of three volumes on the e-Services Project.

Volume One: <i>e-Services Project, Introductory Booklet</i>	High level overview of the e-Services Project. This volume includes timelines, and project structure and agency resourcing.
Volume Two: <i>e-Services Project, Services List Framework</i>	A detailed guide to the framework and methodology that will be used to collect the Services List. This volume includes purpose tasks, and deliverables.
Volume Three: <i>e-Services Project, User Guide for Collecting the List of Government Services</i>	A practical guide to collecting the Services List (Phase I of the project). This volume includes a detailed explanation of the Services List Tool Set, and how to use it to collect the services.

Framework Overview

Services List Framework Approach

The framework for services modelling has been developed based on the Unisys e-Strategy and SYSDOC's Chart, Challenge and Change methodologies¹. The Services List will be undertaken in four stages as shown below:



¹ Unisys e-Strategy methodology is part of the Unisys TEAMmethod, which is a registered service mark of Unisys Corporation
SYSDOC Chart, Challenge and Change Methodology, Registered 2001

Introduction

The tasks and activities described in this framework are intended for guidance purposes. As agencies are at different stages in their services lifecycle there may be a need to modify steps in the process. The approach can be customised to meet each agency's requirements. For example, if an agency already has a well-established electronic services direction and online service delivery plan, the approach could be used as supplied.

The deliverables from this exercise, however, will remain as standard as possible to ensure that there is a capability for comparison across agencies.

Stage 1: Scoping & Mobilisation

The aim of this stage is to gain Agency acceptance of the purpose and importance of this project and a commitment of resources by the Agency to collect service data. It is during this stage that the Agency takes a high-level review of its current online service delivery capabilities and plans for e-services. This enables a Terms of Reference (TOR) to be developed and signed between the Agency sponsor and the agency to move to the next stages.

Stage 2: Services Definition/Description

The purpose of this stage is to collect service descriptions from each of the agencies and to collate them into a common inventory. The EGU Project team will provide training and facilitation to support the agency projects collecting this data.

Stage 3: Customer Services Grouping

The purpose of this stage is to analyse the data collected in Stage 2. Services will be grouped from a user-focused viewpoint. Preliminary services opportunities will be identified by looking for commonalities across service users, services and delivery channels.

Stage 4: Implement

The purpose of this final stage of the process is to finalise the service inventory and make the data available through the E-government portal. This stage will involve ensuring the accuracy of the information collected and developing a process to ensure the currency of the data on an ongoing basis.

Stage 1 : Scoping and Mobilisation (SM)

Description

The aim of this stage is to gain Agency acceptance of the purpose and importance of this project and a commitment of resources by the agency to collect service data.

In order to collect valid and consistent data from each of the agencies, an agreement in the form of a Terms of Reference (TOR) will be signed between the Agency Sponsor and each government agency.

The main purposes of this stage is to:

- Agree the scope and timeline for this project
- Get executive sponsorship within the agency
- Get approval for agency funding and resource allocation for development of the services list.

The key inputs for this phase include:

- Environmental assessment of New Zealand and international online governmental services in the agency's area of interest.
- A standard Service List Project TOR that is used as a starting point for a customised TOR.
- A standard set of service definitions for the agency service context.
- The Service User and Stakeholder Service Model description



The outputs for this phase include:




- Agency Executive approval to the Services List project.
- Agency co-ordinator and co-ordinators are identified and assigned to the project.
- An EGU e-Services Project team member is assigned as the primary contact for the agency.

Deliverables

1. Preliminary Assessment of the Agency's service portfolio
 - **Description:** A summary of those services being provided, planned or proposed based on an agency review of its current operations and plans and the target service user/stakeholder groups.
 - **Format:** A report generated from the Services List Database.
2. Signed TOR for agency
 - **Description:** An agreement between the Agency and EGU about the approach and resources to be committed to the collection and documentation of a services list.
 - **Format:** A customised version of the generic Agency TOR.
3. Preliminary workplan.
 - **Description:** High-level description of tasks and agreement on specific staff resources devoted to these tasks and timeframes. This is a direct input into the Agency TOR.
 - **Format:** A high-level project plan (Microsoft Project).

Stage 1: Scoping & Mobilisation Stage (SM): Tasks/Resources

Task ID	Task Type	Task	Description	Team	Templates Available
SM-1	Research & Analysis 	Review online services in the same agency – NZ and overseas	<p>Objective: To provide a benchmark for comparing the Agency’s service profile against.</p> <p>Description: This review is conducted by the Agency and the EGU project team mainly through Web searches and contact with equivalent governmental groups within the U.S., U.K and Europe.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Conduct a Web search for e-government references/examples 2. Review New Zealand e-government policies and strategy 3. Review related New Zealand agency e-government initiatives. 4. Compile documentation describing current “good practice” in e-government and describing the kinds of services currently available or planned for e-government. 	EGU project team/ Agency	e-Readiness Assessment
SM-2	Data Gathering 	Review agency web site, online service delivery plans & current projects.	<p>Objective: To identify sources of services information within the agency and the ease of using them in order to factor realistic data into decisions about the size and effort required to develop the data necessary for the Service List project.</p> <p>Description: This review is conducted by the Agency mainly through collecting the following information:</p> <ul style="list-style-type: none"> • Agency website(s): URL. This should include any outsourced service provider websites relevant for customer service delivery. • Call Centre / customer service manuals and statistics • Agency business/IT strategy/plans, online service delivery plans • Current projects portfolio • Customer satisfaction surveys • Customer complaints register • Service delivery performance targets/metrics <p>Activities:</p> <ol style="list-style-type: none"> 1. Gather data about how much service information is easily available. 2. Estimate the amount of time and skills that will be required to translate this source information into the data required for the Service List Database. 	Agency / EGU	

Task ID	Task Type	Task	Description	Team	Templates Available
SM-3	Data Gathering 	Review current service delivery operation	<p>Objective: To develop a high-level “picture” of service delivery within the agency in order to provide initial guidance about where to focus data collection.</p> <p>Description: Based on the information collected in the prior task, the agency takes a first cut at understanding its service delivery operational issues and performance.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Review and analyse the information gathered in the prior step. 2. Summarise service delivery issues by service user group at a high level. 3. Complete e-Readiness Questionnaire in the toolset 	Agency/EGU	
SM-4	Sign Off 	Develop TOR for agency	<p>Objective: Reach a formal agreement on the project to be run by the Agency to collect service list information.</p> <p>Description: Creating the Agency TOR based upon the generic Agency TOR and the information gathered in steps SM1-SM3.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Identify and brief the Agency Sponsor. 2. Review the generic Agency TOR and update it to include details specific to the agency. 3. Agree the approach or make modifications to it (after consultation with the EGU project team) 4. Identify, through the development of the preliminary workplan, the estimated cost, duration and resource requirements and incorporate this information into the TOR. 5. Gain Sponsor approval for the TOR. 	EGU/Agency teams	Generic Agency TOR
SM-5	Sign Off 	Gain Executive Commitment for Services List	<p>Objective: Agency management is willing to support the project and own the results.</p> <p>Description: Commitment means that Agency senior management will support and drive the the project.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. The Agency Sponsor communicates the initiation of the project to all relevant service delivery units including Market Communications, and gets Board approval if necessary. 2. The Agency Sponsor ensures agency level commitment to gather and maintain services description. 	Agency Manager / EGU Manager	Generic Agency TOR

Stage 2 : Services Definition and Description

Description

The purpose of this stage is to collect service descriptions from each of the agencies and collate them into a common inventory. The EGU project team will play the role of trainer and facilitator in support of the agency project staff collecting this data. The service data collected at this stage will be the basis for the remaining two stages. An interim service data collection tool called the Service List Database, will be used to capture the data.

The key inputs for this phase include:

- The Agency TOR
- Agency team Training materials
- The standard set of service definitions
- Preliminary workplan
- The Service User and Stakeholder Service Model description
- Agency/cluster Environmental Report



The outputs for this phase include:


- Trained agency co-ordinators
- Detailed Workplan for the agency project
- List of services currently in place, planned, or proposed.
- Service descriptions written according to NZGLS meta-data standards
- Service pack definitions and descriptions



Deliverables

1. Trained agency co-ordinators
 - **Description:** Selected agency staff are fully familiar with the Service Delivery Models, service definitions, and techniques for service descriptions.
 - **Format:** Workshop with an EGU project team member.
2. Workplan for agency
 - **Description:** Fully detailed project plan identifying tasks, resources and timeframes for collection of services data from the agency.
 - **Format:** Gantt chart with activities, effort and resources identified.
3. List of services
 - **Description:** A list of current, planned and possible services that the agency could provide.
 - **Format:** Report from the Service List Database.
4. Service description per NZGLS meta-data standards
 - **Description:** The list of services fully catalogued in a standard format and with standard definitions.
 - **Format:** Report from the Service List database.
5. Service pack definitions & descriptions
 - **Description:** All of the supporting material that is currently in place or has been suggested for the service descriptions.
 - **Format:** Copies of this current supporting material.

Stage 2: Service Definition & Description (SD): Tasks & Resources

Task ID	Task Type	Task	Description	Team	Reference to templates
SD-1	Training 	Train Co-ordinators	<p>Objective: Train agency staff to be able to carry out the Service List project.</p> <p>Description: EGU provides training to selected agency staff in the Service Definitions, how to use the Service List Database etc. so that they can start collecting services data.</p> <p>Activities:</p> <ol style="list-style-type: none"> Conduct a training session for selected agency staff where: <ul style="list-style-type: none"> The purpose and objectives of the project are explained (including timelines) The deliverables required of the agency are explained The supporting templates and tools are shown and explained The Framework, Service List Database and other supporting materials are explained. Practice the development of: <ul style="list-style-type: none"> Service List Service Description Service Pack description 	EGU Business Analyst; Agency co-ordinators	Users Guide; Co-ordinator's Guide; Service Definitions; Service List Database
SD-2	Report 	Develop Detailed Workplan	<p>Objective: To set out the sequence of tasks to complete the project on time and budget.</p> <p>Description: The Agency refines the preliminary workplan with additional tasks and/or sub-activities that were not identified in the initial planning.</p> <p>Activities:</p> <ol style="list-style-type: none"> Flesh out the specific tasks required to collect and document services data. Assign a resource(s) to each specific task Assign a period of time to each task with expected duration. Integrate the results of this work into a revised project plan to be submitted to the Agency and EGU for approval. 	Agency PM; EGU project manager	Generic Project Plan

Task ID	Task Type	Task	Description	Team	Reference to templates
SD-3	Workshop 	Conduct Services Definition Workshop	<p>Objective: To identify and document the full range of services being offered, planned or proposed by the agency.</p> <p>Description: The EGU Lead Consultant facilitates a workshop with agency people explaining the kinds of information required to document current, planned and possible agency services. The workshop could include the following elements:</p> <ul style="list-style-type: none"> • E-government description and examples/ case studies • An explanation of the NZ meta-data standards and the Service Definitions and Service Delivery Models. • Service descriptions of one or two services being provided by the agency right now. • Samples of the output to be collected through the Service List Access database • Creating first-cut service list based on the participants knowledge of their agency's operations and plans. <p>Activities:</p> <ol style="list-style-type: none"> 1. The agency co-ordinator identifies who within the agency should participate in this workshop. 2. The agency co-ordinator customises presentation material to meet the needs of the workshop. 3. EGU facilitates the workshop during which: <ul style="list-style-type: none"> • Agency project team members develop the Services List including: <ol style="list-style-type: none"> a. Service names and types b. Key contacts for these services c. Key users for the service(s) d. Brief description of the service 4. The results of the workshop are documented and the Service List database is updated. 	Agency Co-ordinator; Agency people; EGU Business Analyst	

Task ID	Task Type	Task	Description	Team	Reference to templates
SD-4	Report 	Describe Services	<p>Objective: To fully document and categorise all the agency services.</p> <p>Description: The Agency project team documents all the services identified in the workshop and from any follow-on events (e.g. further workshops, interviews, discussions, etc.). These services will be described using the Service List database or data collection templates.</p> <p>Activities:</p> <ol style="list-style-type: none"> From the initial list of services compiled in the workshop do the following: <ul style="list-style-type: none"> Make contact with the manager responsible for the service and request any additional documentation available. These discussions might identify other services. If necessary, conduct additional interviews with staff responsible for the service to collect more detailed information. Ensure that all of the information collected about services is entered into the Service List database in a format that complies with NZGLS meta-data standards. Take the more detailed information and enter it into the relevant templates/fields of the Service List Database. 	EGU Lead Consultant; Agency staff	Service List Database forms.
SD-5	Report 	Refine Service Packs	<p>Objective: Identify all resources required for the service being provided by the agency.</p> <p>Description: The agency project team identifies and documents all of the collateral (e.g. fact sheets, brochures, systems, forms) that the agency has available for current and planned services.</p> <p>Activities:</p> <ol style="list-style-type: none"> The Agency project team collects and stores copies of all supporting documentation/material used for services. The Agency project team captures relevant resource related information into the Service List Database. Make sure all forms that are in the Forms Inventory are linked to the forms identified in the Services List. 	Agency staff; EGU Business Analyst	

Stage 3: Customer Services Grouping

Description

During this stage the agency data is analysed to produce the opportunities to build or enhance online services.

The focus of this stage is to group services from the point of view of the user (e.g. citizen or stakeholder). This analysis will result in detailed descriptions of the services data that can be translated, in the next stage, into information that will be integrated into the New Zealand Government Portal.

The grouping process will identify service integration opportunities by looking for commonalities across service users, services and delivery channels.

The key inputs for this phase include:

- List of services currently in place, planned, or proposed.
- Service descriptions written according to NZGLS metadata standards
- Service Pack definitions and descriptions



The outputs for this phase include:

- A first-cut list of opportunities for e-government services.
- A process map showing the linkages between service user groups, delivery channels and agency services.



Deliverables

1. List of service users and opportunities to add value
 - **Description:** A list of opportunities ranked by the likely value-add to users of government services. This list will include all services – not just those most likely to be e-enabled.
 - **Format:** Report from the Service List Database.
2. Preliminary life-event and service user segment grouping from agency's user definition
 - **Description:** A mapping showing the relationships between service users and life-events.
 - **Format:** Graphical chart with explanatory text.
3. Preliminary online service opportunities for the agency.
 - **Description:** A list of recommendations from the EGU project team to SSC about the most value-add services to focus attention too.
 - **Format:** A prepared report from EGU.


Stage 3: Customer Services Grouping (CSG): Tasks & Resources

Task ID	Task Type	Task	Description	Team	Reference to templates
CG-1	Report 	Review Services List	<p>Objective: Ensure there are no gaps/inconsistencies in the data collected about services from the agency.</p> <p>Description: The EGU project team member will review the data stored in the Service List Database to ensure it is:</p> <ul style="list-style-type: none"> • Complete • Accurate • Consistent with the service definitions and the NZGLS standards. <p>Activities:</p> <ol style="list-style-type: none"> 1. Agency co-ordinator and EGU project team member review reports generated out of the Service List database for accuracy and comprehensiveness. 2. Agency project team follow up on any discrepancies/gaps and update the database. 3. Agency project team provide a preliminary sign-off of the validity of the data. 	Agency co-ordinator/ EGU project team member	Service List database.
CG-2	Workshop 	Identify service users and service delivery issues.	<p>Objective: Identify and document common features and/or issues in the services being provided or planned by the agency.</p> <p>Description: The Agency project team and the EGU project team representative will review the data collected and stored in the Service List Database to identify commonalities in:</p> <ul style="list-style-type: none"> • Services • Delivery channels • Service user groups / service user types <p>Activities:</p> <ol style="list-style-type: none"> 1. Set up and conduct a Customer Grouping Workshop² with Agency people. 2. Based on the fields available in the Service List database, run reports showing services by different categories (e.g. delivery channels, service users, services). 3. Review agency data gathered in Stages 1 and 2. 4. Using the data from these reports, develop a list of: <ul style="list-style-type: none"> • Common processes/interactions across all agencies • Service delivery issues. 	Agency people; EGU project team member.	

² Please note that steps CG-2 to CG-5 are all completed as part of the Customer Grouping Workshop. Therefore, any references to the Workshop refers to one workshop only in this stage.

Task ID	Task Type	Task	Description	Team	Reference to templates
CG-3	Workshop 	Map processes at a high level.	<p>Objective: To make it easy to see the linkages between service users, services, and delivery channels.</p> <p>Description: Based on the linkages identified in the prior steps, a high-level process map will be created to graphically demonstrate these linkages. Focus will be on service user/agency and agency/agency interactions to deliver a service.</p> <p>Activities:</p> <ol style="list-style-type: none"> The Agency project team will develop a high level process map (or Channel Matrix³). <ul style="list-style-type: none"> The EGU project team member will assist in this area if the skills/software are not available in the agency project team. The Matrix will be annotated and text provided to describe the chart. The Matrix will be approved by the appropriate selected agency manager. 	EGU project team	
CG-4	Workshop 	Group Services from a service user point of view.	<p>Objective: To translate the data collected about services into a view from the service user/ stakeholder point of view so as to identify opportunities and issues.</p> <p>Description: Using the process map, the Agency project team will be able to identify those services most likely to have the largest impact upon the user. Also by using the process map, the Agency team will be looking for the relationship between “service user life-events” (e.g. birth, unemployment) and the multiple services and delivery channels that usually are involved.</p> <p>Activities:</p> <ol style="list-style-type: none"> Create a table of all services by service user groups. Identify life-events and life-stages for the service user groups. Link service user groups to life-events (such as birth of your child) or life-stages (young, educated) Associate services to life-events and/or life-stages Create a list of all service user/agency and agency/agency interactions for every service. 	Agency project team/ EGU project representative	Service user & Stakeholder Service Delivery Model

³ A Channel Matrix is a table showing Services down one side and Delivery Channels across with various symbols used in the connecting cells to show the nature of the link between the service and the delivery channel.

Task ID	Task Type	Task	Description	Team	Reference to templates
CG-5	Workshop 	Identify preliminary online opportunities.	<p>Objective: To get a preliminary view of the potential for electronic service delivery in agencies.</p> <p>Description: These services will be reviewed and assessed against criteria such as:</p> <ul style="list-style-type: none"> • Current e-government capability in this service line. • The relative difficulty of changing the delivery channel to an electronic one. <p>Assessment against these criteria should lead to a natural priority ranking of online opportunities.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Identify the optimal channel for the interactions by reviewing the Channel Matrix. 	Agency project team/ EGU project representative	

Stage 4: Implement

Description

The purpose of this final stage of the process is to finalise the service list to make the data available through the E-government portal. This stage will involve ensuring the accuracy of the information collected and developing a process to ensure the currency of the data when the project is completed.

The services available from the New Zealand Government Portal will be a mixture of informational (e.g. advice on where to get an application form) and direct (e.g. online forms). The Services List will be integrated into the New Zealand Government Portal thereby making the portal more useful to government service users and stakeholders.

The key inputs for this phase include:

- Approved Service List from each agency.

The outputs for this phase include:

- A working set of services and definitions on the New Zealand Government Portal
- A process for maintaining the currency and accuracy of the service information on the New Zealand Government Portal.

Templates & Tools

- Service List Database




Deliverables



1. Final service meta-data description
 - **Description:** Agency signed off service meta-description document
 - **Format:** Reports generated from the Service List database.

2. Service descriptions on the New Zealand Government Portal
 - **Description:** Any user of the New Zealand Government portal can retrieve information (or link directly to) services and resources that have been included.
 - **Format:** The Prototype New Zealand Government Portal.

3. Service meta-data maintenance process
 - **Description:** An agreed process by which the agency maintains its own information about its services on the New Zealand Government Portal.
 - **Format:** Process document developed by the agency for maintaining their meta-data in the New Zealand Government Portal.

Stage 4: Implement (IM): Tasks & Resources

Task ID	Task Type	Task	Description	Team	Reference to templates
IM-1	Sign-Off 	Review and finalise services list	<p>Objective: Ensure that the Agency provides final sign-off that all of the services information collected by the Agency and compiled by EGU is accurate and complete.</p> <p>Description: The EGU project team will request sign-off by the relevant agency that the data recorded about its services is accurate and current.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. The agency data is produced from reports out of the Service List database for final sign-off by a designated Agency senior manager. 2. Handover to the Portal project team. 	EGU project manager; Agency co-ordinator; Portal Project Manager	Service List Database
IM-2	Report 	Plan to integrate Service List information into portal	<p>Objective: Seek agreement for adoption of the collected service data to be put into the prototype New Zealand Government Portal by the Portal project team.</p> <p>Description: A project plan will be developed by the EGU project team working with the Portal team to feed the services data into the Portal structure.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. EGU project manager will set up a planning session with the Agency project team and a representative from the Portal project to develop a plan for integrating the service data into the Portal. 2. Any issues arising from this planning session will be dealt with by the Agency project team or the EGU project team, if appropriate. 3. Final agreement will be sought between the Agency, EGU and the Portal project team for migration into the Portal. 	Portal Project Team	Portal project meta-language forms.
IM-3	Report 	Update portal service descriptions	<p>Objective: To migrate the service descriptions into the prototype New Zealand Government Portal.</p> <p>Description: The Portal team will update its descriptions from the Services List database.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Specify interface (one-time entry, ongoing refresh) to Portal meta-data repository. 2. Build interface 3. Test interface 4. Load data into production 	Portal project team	

Task ID	Task Type	Task	Description	Team	Reference to templates
IM-4	Report 	Test “ease of search and find”	<p>Objective: Ensure that the service information in the Portal is actually as useful and logically presented as it is intended to be.</p> <p>Description: The EGU project team will develop a series of tests for checking whether the information contained in the portal correctly represents the services being searched for through the Portal by end users (service users and stakeholders).</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Develop criteria for useability testing of the service data in the Portal. 2. Develop a test plan with assistance from the agency and the Portal project team. 3. Run the test 4. Document any issues with searching for and accessing data from the Portal. 5. Make recommendations on how to fix any issues and/or assign a resource to work on the issue. 6. Once the acceptance criteria have been met, ensure there is sign-off by the Portal project team, EGU and the Agency. 	EGU project team; Portal project team; Agency	
IM-5	Report 	Establish process for maintaining service descriptions	<p>Objective: To ensure that the services data within the New Zealand Government Portal maintains its currency and accuracy.</p> <p>Description: The EGU project team will work with the agencies to define and agree a process where the agency will monitor and maintain the currency of its service level descriptions.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. The agency will develop a plan for periodic review and updates of the service data included on the portal. 2. The EGU project team will sign-off on the adequacy of the plan or will raise issues to the agency. 3. The Agency must assign resource, at least by job description, to the maintenance of the service information on the portal. 	Agency project team	Generic maintenance process document

Appendix A : The Framework Templates

Introduction to the Templates

The framework provides three tools:

- Service List Database
- Agency Terms of Reference template
- E-Services Readiness Assessment templates

Service List Database

The Service List Database will be used to collect information about the types of service the agencies provide, how they provide them, and the users that receive that service.

Agencies will be able to access web-enabled forms through the NZGO web site, and enter information and data about the services they provide.

Agency Terms of Reference Template

The Terms of Reference Template will be used to produce an agreement between the Agency and the EGU. It reflects the approach that will be used to gather a list of services, and the resources that will be committed to the project.

Each Agency will receive a customisable template which shows the:

- roles required for the project
- tasks each role is responsible for
- milestones for the agency (including the person/team responsible and the date required)
- deliverables for the project, including the Service List, Opportunity Map(s), Process Definition, and Service Justification.

The template will be customised according to the information provided by the Agency.

E-Services Readiness Assessment Templates

The e-Services readiness assessment templates provide a series of prompts that enable you to start thinking about how ready you are as an organisation to deliver e-government initiatives.

Appendix B – Agency Service List Planning

Description

The aim of Agency Service List Planning is to identify the actions that must be coordinated and resources made available to collect services data from the 55 core agencies within the New Zealand government.

The key inputs to this phase are:

- Framework User Guide
- E-Government Strategy
- Program Plan
- Agency Priority List
- Material from the other e-government initiatives.
- The results of the DOC and Ministry of Environment pilots⁴

The outputs of this phase are:



- A preliminary plan for collecting services data from the agencies.
- Generic activity and resource requirements that can be used to further refine the individual TORs and workplans being developed by the agencies.




⁴ To refine the deliverables of this stage.

Deliverables

1. A high-level project plan.
 - **Description:** This plan would identify at a high level the agencies to be surveyed, the likely tasks and activities that would need to be completed, a speculative set of resource and duration requirements.
 - **Format:** Microsoft Project Plan (or equivalent).
2. TOR for Phase I, Stage 3.
 - **Description:** TBD
 - **Format:** Word document (or equivalent)
3. Service List Data Collection Strategy
 - **Description:** This document would accompany the high-level project plan by providing a text description of the steps each agency will need to carry out within the overall context of the e-Services Project and supporting projects.
 - **Format:** Word document (or equivalent)

Agency List Planning (AL): Tasks & Resources

Task ID	Task Type	Task	Description	Team	Reference to templates
AL-1	Report 	Develop Service List Program Plan.	<p>Objective: Provide guidance on the likely amount of resource and type of tasks that involved with this project.</p> <p>Description: To develop a high-level overview of the types of tasks and likely duration for each agency to collect services data for the e-Services Project.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Collect Critical Mass List 2. Sort the list according to criteria 3. Create generic project plan for small, medium and large agencies 4. Schedule expected work to fit Agency/EGU capacity. 5. Create a high-level Gantt chart for the Agency Roadshow 	EGU Project Team	
AL-2	Report 	Develop TOR for Phase I, Stage 3 of the e-Services Project	<p>Objective: TBD</p> <p>Description: TBD</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. TBD 	EGU Project Team	

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AL-3	Report 	Develop Collateral for Roadshow.	<p>Objective: To develop information for Agencies about the project that will be useful in explaining what need to be done and how.</p> <p>Description: Putting together the explanatory material, templates and other guidance required to explain and support Agency teams responsible for documenting the services lists.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Develop a logistics plan including <ul style="list-style-type: none"> • Likely resources required • The data collection templates and tools available • Contact points 2. Develop a presentation explaining the nature of the project, what is expected, when it is expected and how it will be done (the Agency Roadshow). 3. Communications Plan – develop a plan for how and when information will be communicated to each Agency and how feedback on the requirements and processes will be ensured. 	EGU Project Team	
AL-4	Presentation 	Conduct the Agency Roadshow	<p>Objective: Provide information to Agencies about the project to gain their buy-in.</p> <p>Description: Provide the information developed for Agencies to understand the requirements of the project.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Conduct the Agency Roadshow presentation. 2. Provide all of the documentation that might be helpful to the participants. 	EGU Team	
AL-5	Meeting 	Set up Initial Meetings with Agencies	<p>Objective: To gain acceptance by the Agencies of the project and its requirements.</p> <p>Description: To present the strategy and project plan documents to each Agency as the first step toward gaining agreement to the project.</p> <p>Activities:</p> <ol style="list-style-type: none"> 1. Set up a meeting with each Agency. 2. Present the strategy and high-level project plan. 	EGU Team / Agency Senior Management	