Enterprise Architecture (Re)Charter Template

To learn more about this full research or to inquire about membership, contact us:

+1-866-913-8101
IT.Support@executiveboard.com
www.cebglobal.com/IT

CEB Enterprise Architecture Leadership Council
This template is intended to fast-cycle the (re)chartering of an EA group. Because this template is designed to identify progressive EA group priorities, it largely focuses on the changes that need to take place in the EA operating model. Based on member feedback about EA functional performance and priorities, we’ve designed this charter template so that it can be used by EA groups that are being initialized, as well as groups that are being reformed or “rechartered”. Supporting foundational sections are included as appendices.

For further implementation support, see CEB’s Enterprise Architecture Leadership Council website and the study Rechartering EA: A New Operating Model for Actionable Strategy and Scalable Project Engagement.
# Table of Contents

Document Purpose ............................................................................................................. 3

Background .......................................................................................................................... 3

1: Introduction ...................................................................................................................... 4

2: EA’s Organizing Principles and Mission Statement ......................................................... 6

3: Enterprise Architecture Functional Priorities ............................................................... 7

4: Key Priorities for Enterprise Architecture ...................................................................... 9

4.1: Work Products ............................................................................................................ 9

4.2: Project Engagement .................................................................................................... 9

4.3: Business Enablement ................................................................................................. 9

4.4: IT Portfolio Planning .................................................................................................. 10

4.5: Portfolio Stewardship ............................................................................................... 10

4.6: Talent ......................................................................................................................... 10

5: Responsibility Matrix ..................................................................................................... 11

6: Objectives and Metrics .................................................................................................. 12

6.1: Business Value Demonstration .................................................................................. 12

6.2: Intermediate Performance Metrics ............................................................................ 12

7: Conclusion ...................................................................................................................... 13

Appendix: Span and Scope of the Enterprise Architecture Function ................................ 14

Appendix: Functional Governance and Direction – EA Steering Committee ................. 16

Appendix: Enterprise Architecture Processes .................................................................. 17

Appendix: Planning Horizon .............................................................................................. 19

Appendix: Glossary ............................................................................................................ 20

Appendix: Document History ........................................................................................... 22
Document Purpose

[Sample Text] This document is designed to outline a progressive and effective operating model for the enterprise architecture function at [Organization]. Its purpose is to guide the (re)establishment of the EA program through revised high-level plans, decisions, roles and responsibilities, and metrics. This charter is the vehicle through which the [Organization] empowers EA to design and oversee the evolution of the [Organization]'s enterprise architecture through the delivery of key EA services. In addition, this charter will introduce the EA program to others and help build sponsorship and commitment from key stakeholders. This document should be updated when major changes (e.g. major service revisions) occur in the program.

CEB defines enterprise architecture as the description, planning, and design of an organization, including its operations, information, systems, and technologies. Through a comprehensive understanding of the enterprise, EA identifies opportunities to reduce complexity, design the desired future state of the organization, and create plans for the execution of strategic directions.

Background

[Summarize the decision or events leading to the rechartering of the enterprise architecture function]

[Sample Text] Organizational and technological change are exerting considerable pressure on IT structures that have traditionally centralized the prioritization and delivery of technology. This is especially true of EA, which has typically concerned itself with top-down, multi-year planning. In the current IT environment, EA’s traditional approach and tools are less effective in dealing with:

- Increasingly IT-savvy business stakeholders who are willing to assume responsibility for technology adoption without input from IT
- A diversifying portfolio that includes smaller projects that often have a shorter development and lifecycle than traditional investments (e.g. mobile apps)
- The emergence of end-to-end IT services as the preferred model of IT delivery. End-to-end IT services package together all of the people, process, technology, and information required to enable a business outcome. Each end-to-end IT service is described by the business capabilities it supports and is delivered across applications and infrastructure.

[Sample Text] In light of these realities, EA now needs to work within much shorter timeframes and focus on accelerating delivery while ensuring solution quality. Consequently, traditional EA activities and deliverables need to be significantly reconsidered. This document outlines the principles and priorities for a modern and progressive EA function.
1: Introduction

[WHAT: Explain the function’s intent and vision]

[Sample Text] Enterprise architecture helps an organization achieve its objectives by enabling the delivery of business capabilities and stewarding technology resources to their most efficient and effective use. EA minimizes unnecessary complexity in the technical environment, accelerates delivery of critical business capabilities, improves integration quality, and supports innovation, employee productivity, and enterprise collaboration. While technical and application architecture are critical, they are not sufficient for a progressive EA function. Exemplar organizations include information, service delivery, and business architecture as well.

[HOW: Explain the function’s new approach]

[Sample Text] EA’s job is to optimize IT [adjust to EA’s scope] along three dimensions:

1. Across the enterprise to enable business outcomes
2. Throughout the technology portfolio to ensure technologies work together
3. Over time as technologies and the demands of the business evolve

[Sample Text] This was hard to do when EA could focus on a limited set of big IT initiatives. It is much harder now as the number and diversity of projects increases and control over IT decision-making becomes more diffused.
The EA function needs to adapt to a broader stakeholder base that is doing IT faster and smaller, but not necessarily better or cheaper. [Organization] needs to re-examine EA operations. In order to reduce unnecessary cost and complexity, enterprise architecture can’t only be practiced within small, centralized EA groups any longer. Enterprise architects must become the leaders and stewards of the discipline, not its sole practitioners. Nevertheless, EA groups can’t be all things to all technologies, and so EA has to create a clear set of priorities and an engagement model that supports those priorities consistently.

[Sample Text] An effective EA program will help align IT investments with long-term strategy, reduce technology lifecycle risk, and enable the rapid delivery of adaptive solutions and high quality information. Although EA maintains its roots in IT, it aims to be more agile and business-driven. Consequently, the enterprise architecture function itself will have to adapt.
2: EA’s Organizing Principles and Mission Statement

While traditional EA approaches regard strategic and tactical work as separate endeavors, progressive EA groups recognize that strategic planning and project engagement are mutually reinforcing. EA needs to be engaged in the right projects to ensure they fulfill the long-term vision, while simultaneously recalibrating that vision to business realities. The function needs to follow three operating principles:

1. **Establish clear criteria for EA involvement** – Establish EA services that clarify when to use EA and create rules of project engagement to more effectively allocate scarce EA resources in projects.
2. **Architect for business outcomes through business capability enablement** – Use business capabilities as EA’s organizing structure, anchoring strategy and demand to a common language across the enterprise. Use business capabilities to align your activities and resources to support speed for the differentiated parts of the business and efficiency for common business functions. Use business capabilities to ensure rigor in the execution of long-range strategy.
3. **Retool governance to support speed and scale** – Embed governance via reference architecture. Federate the development and maintenance of reference architectures to cover a broader percentage of the IT portfolio, which can lower IT support costs and build credibility. Develop architects who are challengers and excel at business engagement in order to influence decisions prior to formal governance structures (e.g. ARBs) that focus on accountability.

In light of the above priorities:

**[Provide the mission statement]**

*The mission of the enterprise architecture program is to make its strategies more actionable, and its project engagements more scalable to enable [organization’s name] to deliver its business capabilities and long-term strategy.*

**[Provide near-term objectives]**

In its first year, the rechartered EA function will establish a list of 10-20 clear, precise, prescriptive architectural principles that will be broadly available to guide solution development teams, program managers, and business sponsors. EA will also:

1. Establish a small set of easy-to-consume EA services.
2. Tie delivery roles/teams business outcomes and not just architecture expertise. Also, optimize the use of EA resources by establishing a principled approach to determine the scope and depth of EA involvement.
3. Establish enterprise architecture as a broadly-practiced management discipline through self-service. Provide non-architects with simple tools that save time, improve project success rates, and reduce governance friction.
4. Develop a high-level enterprise business capability model in conjunction with partners in the business that accurately reflects the operations of the enterprise, including its transformational capabilities (i.e. how the organization is set up to adapt to change).
5. Use the business capability model to help tier EA’s activities to meet differing, concurrent business objectives (e.g. cost efficiency in commoditized capabilities and speed and flexibility in competitive capabilities).

**[Provide long-term objectives]**

Beyond the first year, the EA program will be assessed based on its ability to:
1. Scale EA impact by initiating a reference architecture program. EA’s primary focus will be on the frameworks, methodologies, and advisory services that promote the development and adoption of RAs by others.

2. Form teams and roles that support implementation of competitively differentiating emerging technologies and embed architects into delivery teams to speed time-to-market while maintaining quality.

3. EA should become a part of the ecosystem through which business needs are translated into technology solutions that advance the target state using business capabilities as the common language.

4. Establish a skills program for EA resources focusing on exposure to testing new technologies, business scenarios, and stakeholder engagement methods.

3: Enterprise Architecture Functional Priorities

Describe the EA program’s activities and how they have evolved from existing goals/approaches] (Re)Chartering enterprise architecture entails addressing six functional priorities – these activities that need to be evaluated in light of the principles laid out above. Together these priorities constitute core areas of (renewed) focus.

1. Work Products
2. Project Engagement
3. Business Enablement
4. IT Portfolio Planning
5. Portfolio Stewardship
6. Talent

The table below identifies best practice approaches by the EA group.

<table>
<thead>
<tr>
<th>Functional Priorities</th>
<th>Traditional Approach</th>
<th>Rechartered Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Products</td>
<td><strong>EA delivers artifacts:</strong></td>
<td><strong>EA provides services:</strong></td>
</tr>
<tr>
<td></td>
<td>[Description] EA’s closed language of models and frameworks made it hard for others to understand and appreciate. A lack of clarity regarding EA’s role leaves the function vulnerable to reactive engagement at the expense of long-term effectiveness.</td>
<td>[Description] The EA function will expose its activities as a limited set of services designed for transparency and ease of consumption by its target audience(s).</td>
</tr>
<tr>
<td>Project Engagement</td>
<td><strong>EA involvement on demand:</strong></td>
<td><strong>EA involvement by design:</strong></td>
</tr>
<tr>
<td></td>
<td>[Description] Without a consistent means of assessing project requirements for EA involvement, EA is likely to sub-optimize the allocation of its resources.</td>
<td>[Description] EA will triage both the initiatives in which it will engage as well as the level of that engagement in order to maximize its impact.</td>
</tr>
<tr>
<td>Business Enablement</td>
<td><strong>Process-based enablement:</strong></td>
<td><strong>Capability-driven engagement:</strong></td>
</tr>
<tr>
<td></td>
<td>[Description] EA’s traditional expertise has centred on large enterprise systems that automate major business processes. Processes are too numerous, inconsistent, and unstable to be a useful organizing structure for EA.</td>
<td>[Description] Business capabilities are a more powerful organizing structure for driving a consistent approach to the common and future objectives of the enterprise, while managing for fundamentally different concurrent business</td>
</tr>
<tr>
<td>IT Portfolio Planning</td>
<td>Applications portfolio management:</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>[Description] EA activities were centered on the development and deployment of applications with longer lifespan (e.g. ERP). In rapidly changing technology and business scenarios, stakeholders are increasingly demanding quick-to-deploy, quick-to-dispose solutions.</td>
<td>SOA maturation and integration:</td>
<td></td>
</tr>
<tr>
<td>[Description] SOA services provide the necessary agility to respond effectively to increasingly diversified and volatile demands from the business. The EA function will adopt a service- and component-oriented philosophy.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Portfolio Stewardship</th>
<th>Mandated governance via standards:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Description] The EA function was mandated to create and enforce governance strategies and their related processes. However, governance can no longer be a top down, command and control exercise in an environment where non-IT constituents are determining the standards.</td>
<td>Embedded governance via RAs:</td>
</tr>
<tr>
<td>[Description] In emerging technologies space, EA can enable higher quality solutions by influencing ideation, embedding governance, and creating more flexible architectures. The EA program will focus on the frameworks, methodologies and advisory services that allow others in the organization to build and maintain their own reference architectures.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Talent</th>
<th>EA offers technical depth:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Description] Architecture value-add was in terms of specific technical expertise due to the nature of technologies deployed and the longevity of business solutions.</td>
<td>EA offers business breadth:</td>
</tr>
<tr>
<td>[Description] Architect effectiveness now depends more on business breadth, influencing abilities than technical depth. While technical expertise is needed, it is not sufficient and in emerging technologies, ceases to differentiate. New hiring and development will focus not on technical mastery first and foremost, but on a team-level assessment that seeks to fill the most significant skills gaps across the architecture team.</td>
<td></td>
</tr>
</tbody>
</table>
Thank You for Your Interest in CEB Research!

If you’re a member, please log into your account to access the full study.

Member Login

If you would like access to this full study, please contact CEB to learn more.

Contact CEB