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Treasury Board Secretariat Review of the Preparedness for the Year 2000

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July 1999

Executive Summary

The purpose of this report is to outline the issues and risk areas identified through our review of Treasury Board Secretariat's (TBS) preparedness for the Year 2000, and to make recommendations to address them, where appropriate.

TBS had previously engaged DMR Consulting Group Inc. to conduct a Year 2000 Review of selected areas (November 1998). As a result of the review TBS compiled a number of recommendations and further decided to revisit the state of readiness, with particular emphasis on the need for contingency planning.

In the process of conducting our review, which followed the methodology developed by Gartner Group and endorsed by TBS, we have met with all the members of the Year 2000 Advisory Committee, as well as other resources involved in the Y2K initiative, and reviewed relevant documentation provided to us.

The review focused on determining whether TBS has taken the actions necessary to mitigate the risks posed by the Year 2000, by assessing criteria related to:

- Organizational Commitment to Address the Year 2000;
- Organization-Wide Impact Assessment;
- Planning and Monitoring;
- Testing;
- Validation of Compliance;
- Business Resumption and Contingency Planning; and
- Legal Review.

Overall Conclusion

Within TBS, there are no government-wide mission critical applications, but there are three department-wide critical applications. The review found that there is no direct service to the public and limited risk with inter-departmental dependencies. As a result of the review, and taking into account the nature of the Treasury Board Secretariat's operations, we conclude that in general appropriate steps have been taken to mitigate the risks posed by the Year 2000.

To further enhance management's due care in relation to Year 2000, we are presenting the following key recommendations for consideration:

- Develop an overall Year 2000 project plan that takes into account all the remaining Year 2000 activities that need to be addressed;
- Institute a freeze on Year 2000 patches from Microsoft, on desktop and server platforms, and application development to at least mid-January 2000 or until such time as a stable environment is achieved;
- Ensure receipt of effective Year 2000 compliance statements from PWGSC. If such are not available, TBS would have to validate the testing process at PWGSC; and
- Ensure that all decision and records related to the Year 2000 initiative are documented and retained in a Year 2000 document repository.

The attached report (deck format) presents details relative to the review's scope, objective, approach, findings and recommendations. Other minor issues that did not warrant inclusion in this report have been communicated and presented to the Y2K Advisory committee during the course of our review for their consideration.

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