



The Power of Partnership:

*Advancing Data Best Practices with
Indiana and the EDM Council*

MANAGEMENT
PERFORMANCEHUB

Data Day 2025 – May 14

Jim Halcomb – *Chief Research & Development Officer, EDM Council*

Peter Holden – *Senior Advocate, Government, EDM Council*



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**Member Support
Team:**
[membersupport@
edmouncil.org](mailto:membersupport@edmouncil.org)

Welcome!



Jim Halcomb

Chief Research & Development Officer
jhalcomb@edmouncil.org



Peter Holden

Sr. Advocate, Government
pholden@edmouncil.org



MANAGEMENT
PERFORMANCEHUB

EDM Council

Who we are...

Mission:

Global Data Management Association for elevating data management, data innovation and analytics, through best practices, standards, training, education and research.

Principles:

We believe in a **responsible data-driven** organization and establishing data literacy for all.

We are the **neutral, non-profit** industry forum.

We advocate **industry collaboration** to advance data management and analytics capabilities for all organizations.



Established
2005



Worldwide
Americas, Europe,
Africa, Asia,
Australia



370+
Member Firms
Cross-industry,
including Regulators



25,000+
Professionals



MANAGEMENT
PERFORMANCEHUB

EDM Council

Who we are...

EDM Council's Areas of Advocacy



Best Practices



Driving Standards



Training & Certification



Research & Benchmarking



Regulatory Engagement



Networking

EDM Council Members – Industry Leaders

EDM Council
Who we are...



EDM Council Members – Global Public Sector

EDM Council

Who we are...



EDM Council Members – Affiliated Trade Associations

EDM Council

Who we are...





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EDM Council Overview

*Advocates for data
management best practices*

EDM Council Flagship Frameworks

EDM Council Communities of Practice

Fireside Chat: *Practical Application of EDM Council's Frameworks in the State of Indiana*

Q&A



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EDM Council Flagship Frameworks



**Data Management Capability
Assessment Model**



Cloud Data Management Capabilities

**Cloud Data Management
Capability Framework**

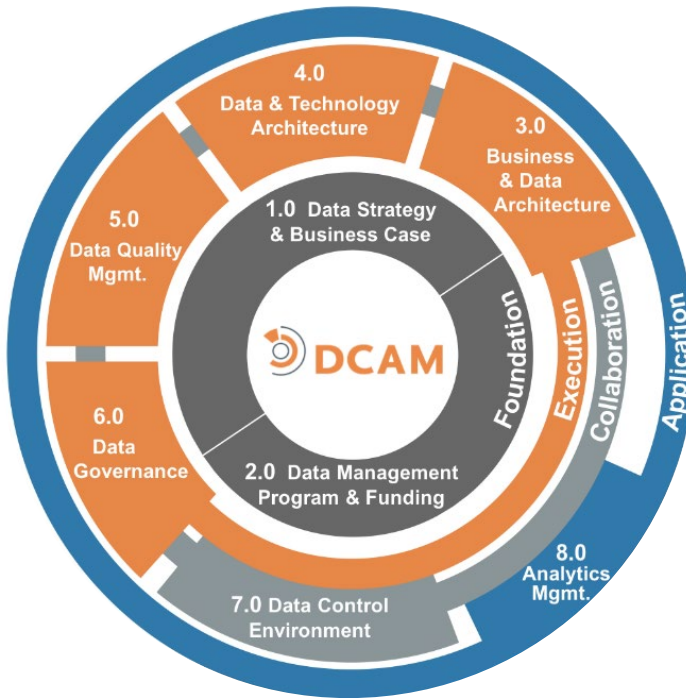
Data Management Capability Assessment Model



An Innovative Approach to Data Management

DCAM is structured to define and measure **capability** – the definition of precisely what is required to develop, implement and sustain a data management program

Based on Collective Industry Experience



- **Collaborative development:** Synthesis of research and analysis among practitioners since formation of EDM Council (case studies, regulatory pressure, collaborative research)
- **Integration of key data management disciplines**
 - Data Management Strategy
 - Program Design
 - Organizational Change
 - Dedicated Funding
 - Data Engineering
 - Technology Architecture
 - Governance
 - Collaboration
- **Driven to be practical:** Aligns with organizational mandate; understandable by non-specialists, based on collaboration, structured for continual improvement

Data Management Capability Assessment Model



A data management best practice paradigm ...

- Provides a common and measurable framework
- Establishes common language for data management
- Translates industry expertise into operational standards
- Documents capability requirements
- Grounded in evidence, formality and organizational engagement
- evidence-based artifacts

Enables organizations **to have trust and confidence** that the data they are relying on is accurate, complete, rationalized and actionable.

How is the DCAM being used today...

Program Initiation



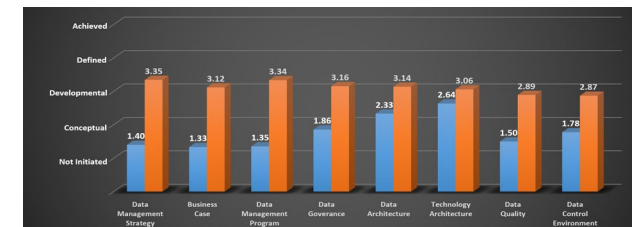
Training and Compliance



Assessments

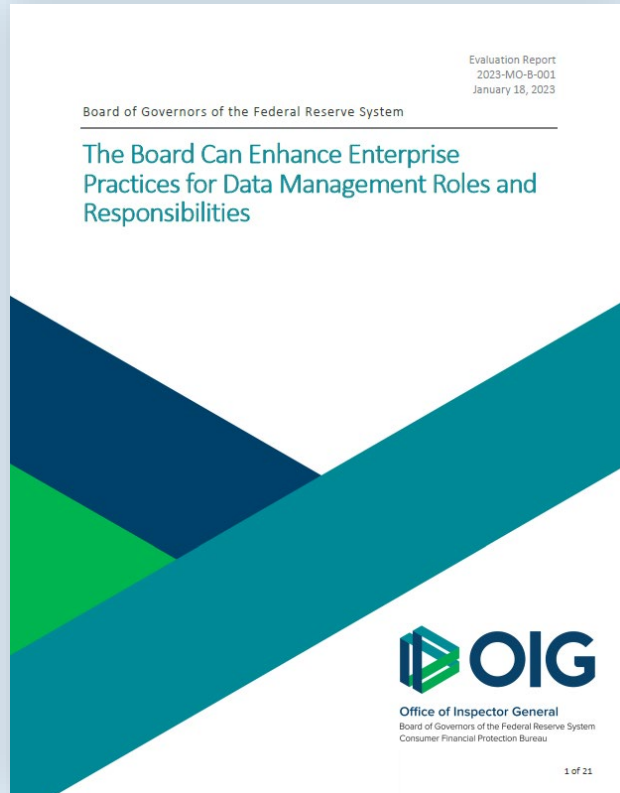


Industry Benchmarking



DCAM in the Public Sector

The OIG and the US Federal Reserve System



- US Federal Reserve System (all district banks and board) utilizes DCAM
- OIG is the audit arm of the US Federal Reserve System
- Public report published January 2023

<https://oig.federalreserve.gov/reports/board-data-management-roles-responsibilities-jan2023.pdf>

“The System is also an EDM Council member, and the System’s Data Management Leadership Team has **endorsed the use of DCAM** as the standard tool for assessing data management maturity.”

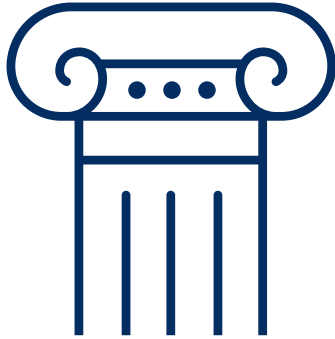


Data Management Capability Assessment Model



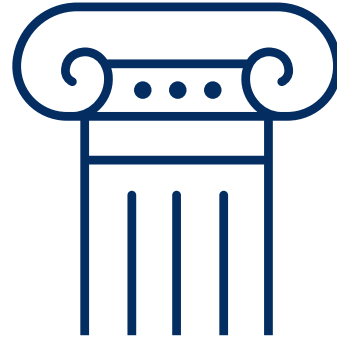
Foundational Tenets

Managing Content (Identify, Define, Locate)



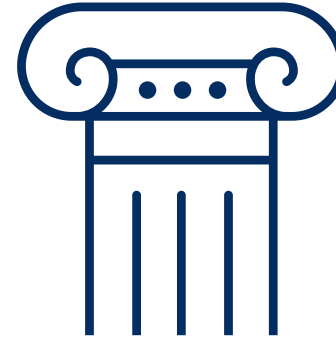
- Unique identification of “things” (products; customers; entities, transactions; etc.)
- Assignment of precise definition of meaning (unambiguous, shared, agreed)
- Data discovery via the development of comprehensive inventories (where data resides)

Build a sustainable program



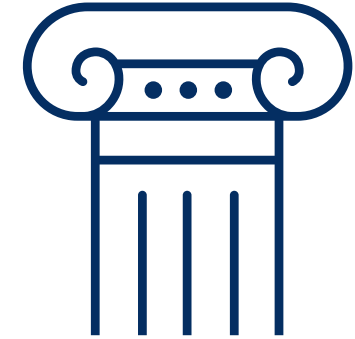
- Identify and develop essential skill-sets, executive support; stakeholders, etc.
- Ensure that data governance is enforceable (authority)
- Drive culture change - sanctioned by executive management, based on standards, harmonized across the lifecycle, governed by policy and monitored by audit

Ensure Data Quality (Data must be Fit- for-Purpose)



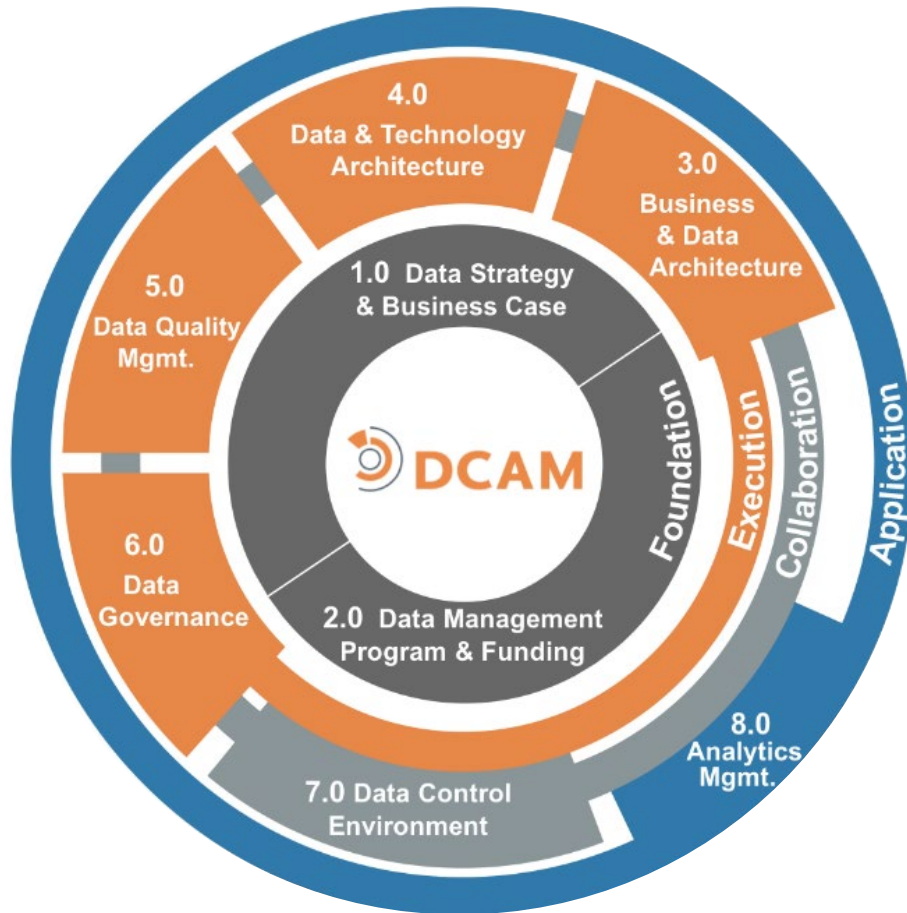
- Establish formal discipline of best practice for data quality
- Clear assignment and accountability for quality assurance
- Minimize manual processes/maximize automation

Enable Cross Organizational Collaboration

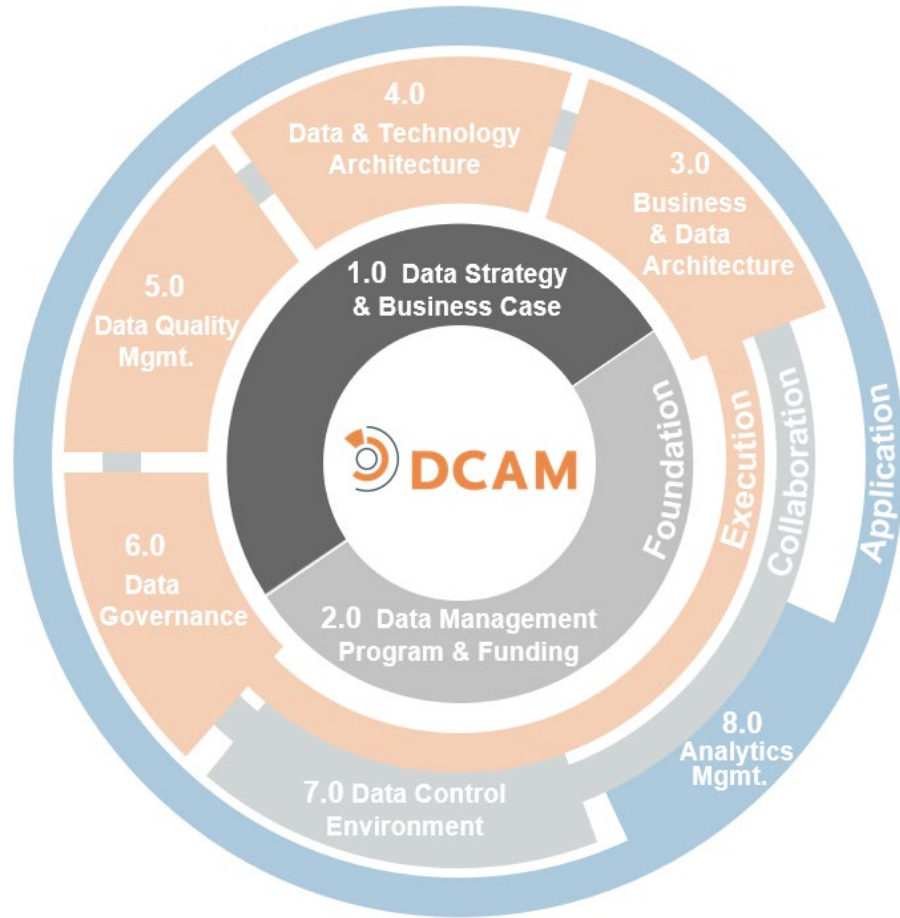


- Coordinate with Business: business drives data which drives technology
- Partner and align with technology (dotted line relationship)
- Collaborate with Cross-organizational Control Functions

Data Management Capability Assessment Model



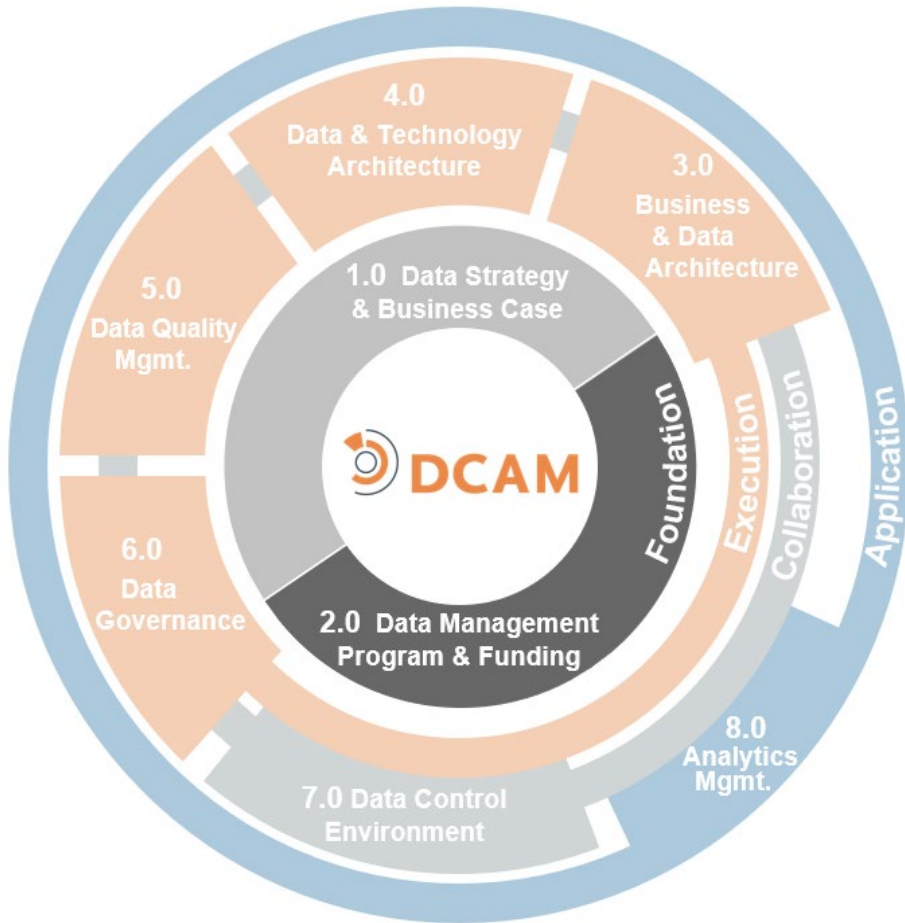
Data Management Capability Assessment Model



1.0 Data Strategy & Business Case

Defines the vision and the purpose of the data management program. Why is data management important?!

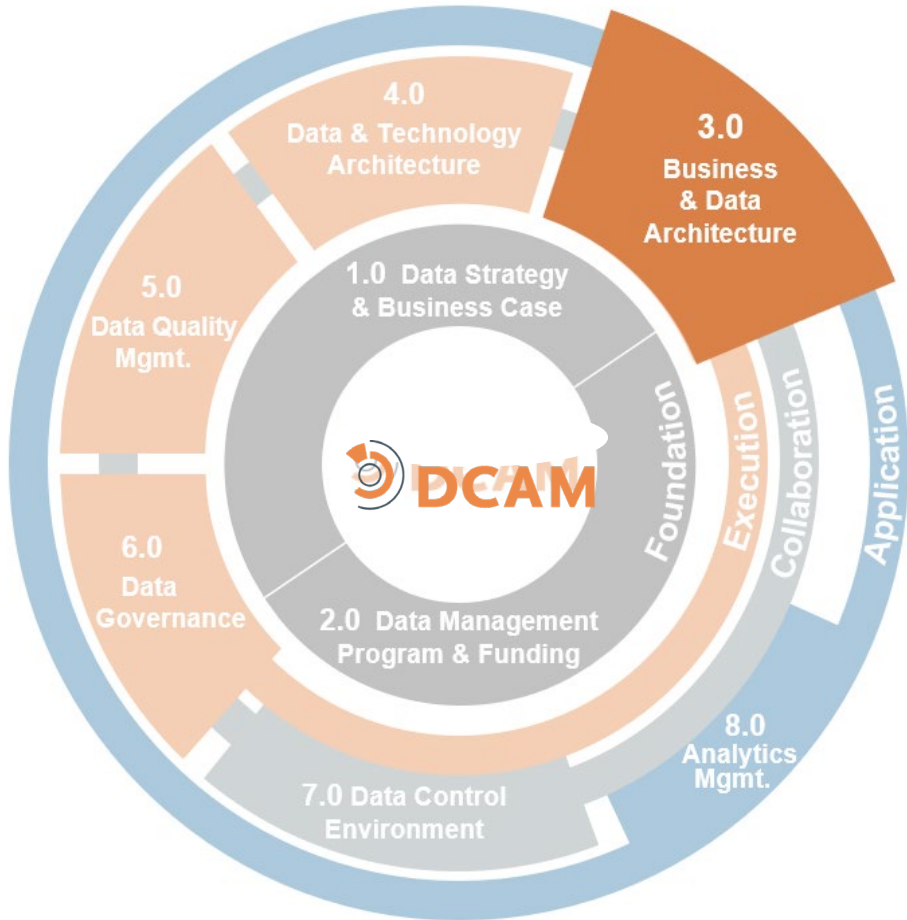
Data Management Capability Assessment Model



2.0 Program & Funding

Describes the organizational structure and funding model of the data management program

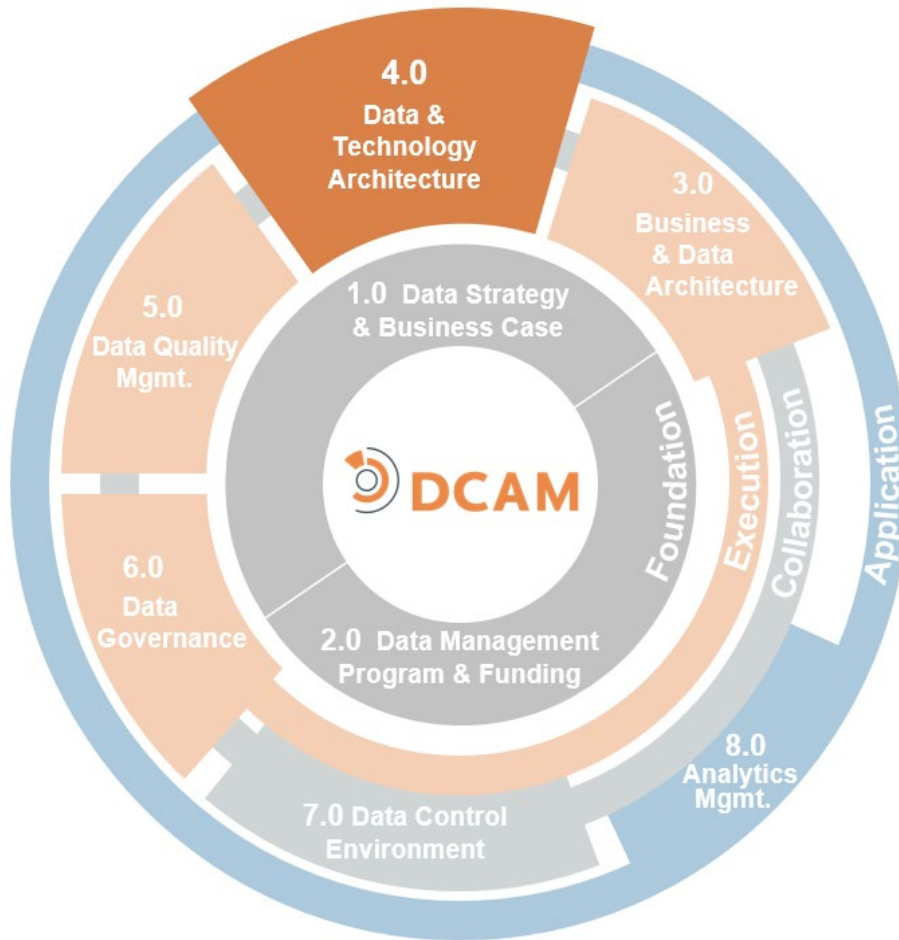
Data Management Capability Assessment Model



3.0 Business & Data Architecture

Data architecture is the design of information content, driven by business architecture (requirements), aligned to real-world objects and entities

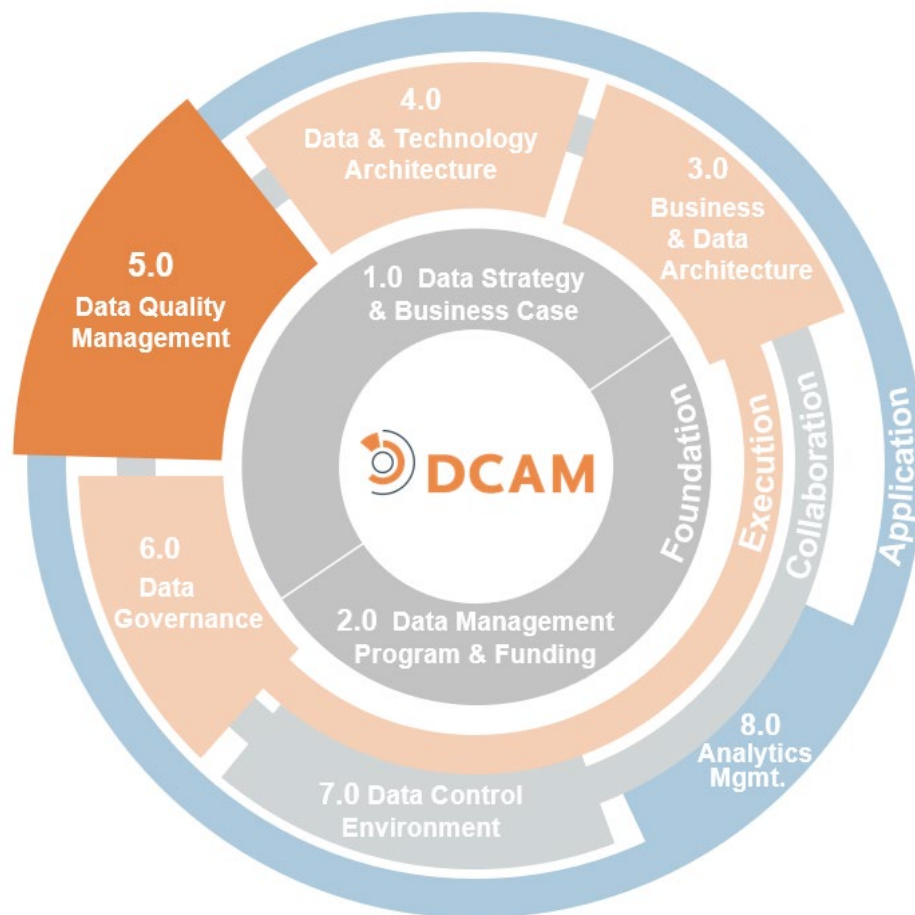
Data Management Capability Assessment Model



4.0 Technology

Technology architecture addresses the physical implementation of data management (platforms; DBs; tool), in collaboration with the business and the data management office

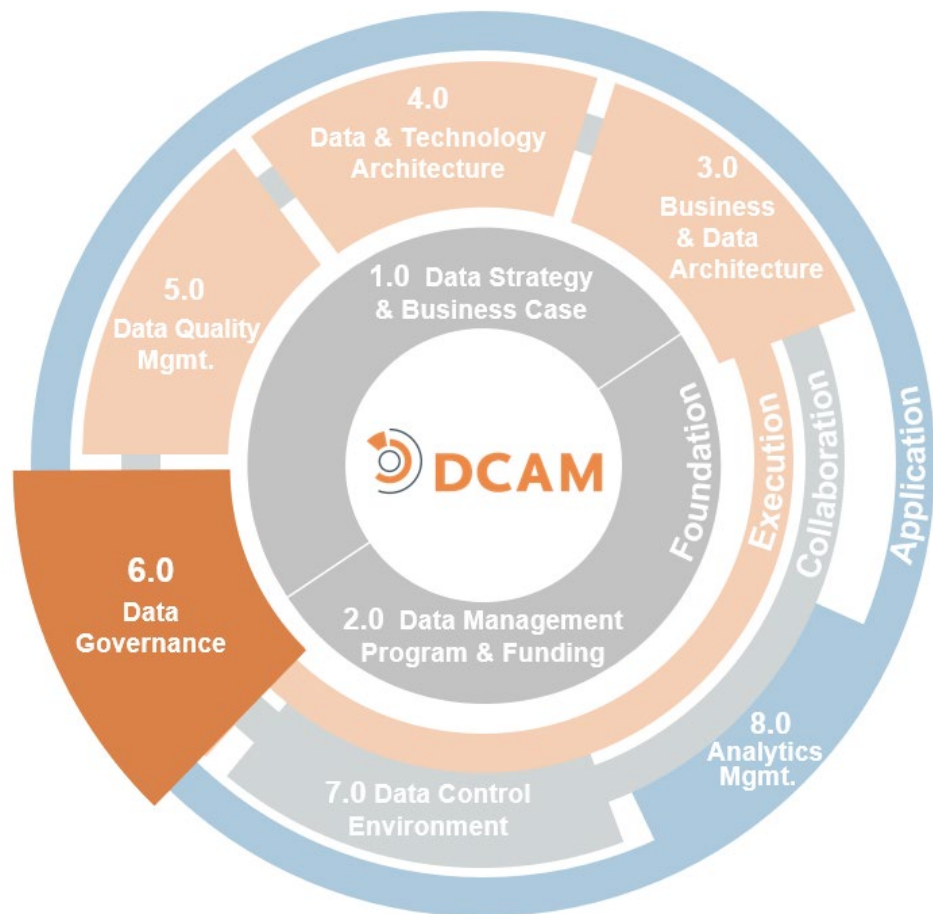
Data Management Capability Assessment Model



5.0 Data Quality

Deliver data that is trusted and fit-for-purpose, where users have confidence that the data is what they need, without reconciliation

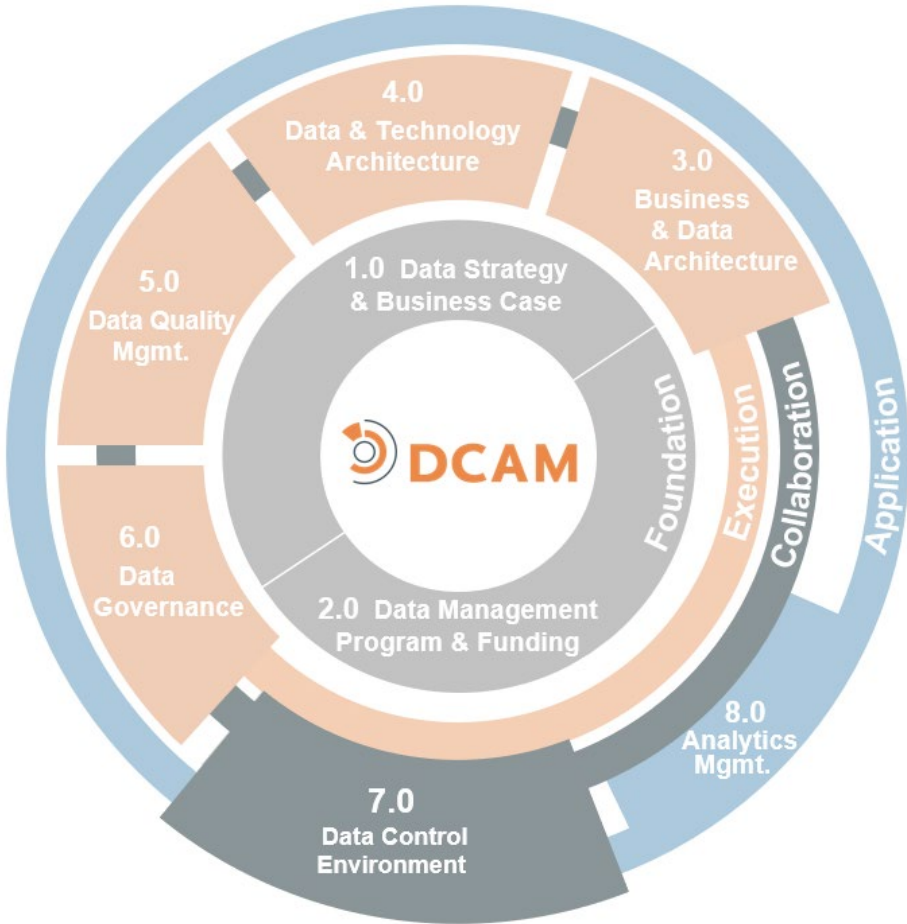
Data Management Capability Assessment Model



6.0 Data Governance

The rules of engagement for data management, focused on the implementation of policies, standards and operational procedures necessary to ensure that stakeholders “behave”

Data Management Capability Assessment Model



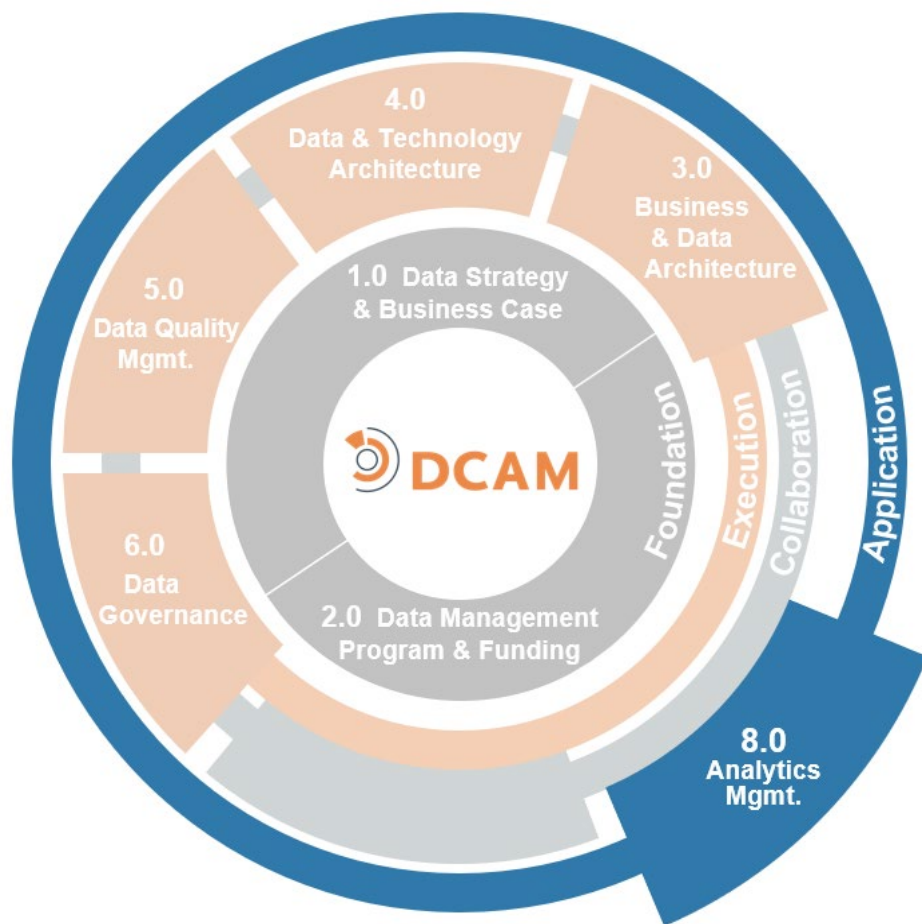
7.0 Data Controls & Sustainability

A successful data management program will enable what is referred to as a “data control environment”.

A data control environment demonstrates governance over the entire data management lifecycle – from acquisition of data thru to consumption. And ensures collaboration with all the existing control functions across the organization

A true ‘control environment’ cannot be achieved until all of the data management capabilities are operating collaboratively and in unison across the enterprise

Data Management Capability Assessment Model



8.0 Analytics, AI/ML GenAI

Analytics Management structures, prioritizes, enables and governs the analytics activities of the organization in alignment with the Data Management capabilities

Training, Certification & eLearning

EDM Council offers certification programs to meet your needs and schedule

**Instructor-Led,
Live, Virtual
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eLearning

**Dedicated
Company
Classes**



Data Excellence Program



Data Excellence Program Founders – Participants



Data Excellence Program Founders – Certified Partners



Data Excellence Program – Participants



Data Excellence Program – Certified Partners



The EDM Council's **Data Excellence Program** recognizes organizations that demonstrate an ongoing commitment to continually advancing their data management program and ensuring trust in data across the enterprise.



Data Excellence Program Badge



- **Publicly recognizes** sustained commitment to Data Management Excellence based on DCAM Global Industry Best Practices
 - The “Intel Inside” for Data Management
 - “Putting Data Management on the Corporate Map”
- **Badge is based** on assessment scope, not enterprise
- **Digital Badge is renewed** on an annual basis upon meeting Annual Program Requirements



Committed



Established



Advanced



Institutionalized

EDM Council Flagship Frameworks



**Data Management Capability
Assessment Model**



Cloud Data Management Capabilities

**Cloud Data Management
Capability Framework**

2020



Morgan Stanley



Question: Can you build a
similar model for migrating and
managing data in Cloud?



100+ Companies including AWS,
Microsoft Azure, Google Cloud, IBM



300 participants



1.5 year project



750+ CDMC meetings



45,000+ work hours

CDMC Framework

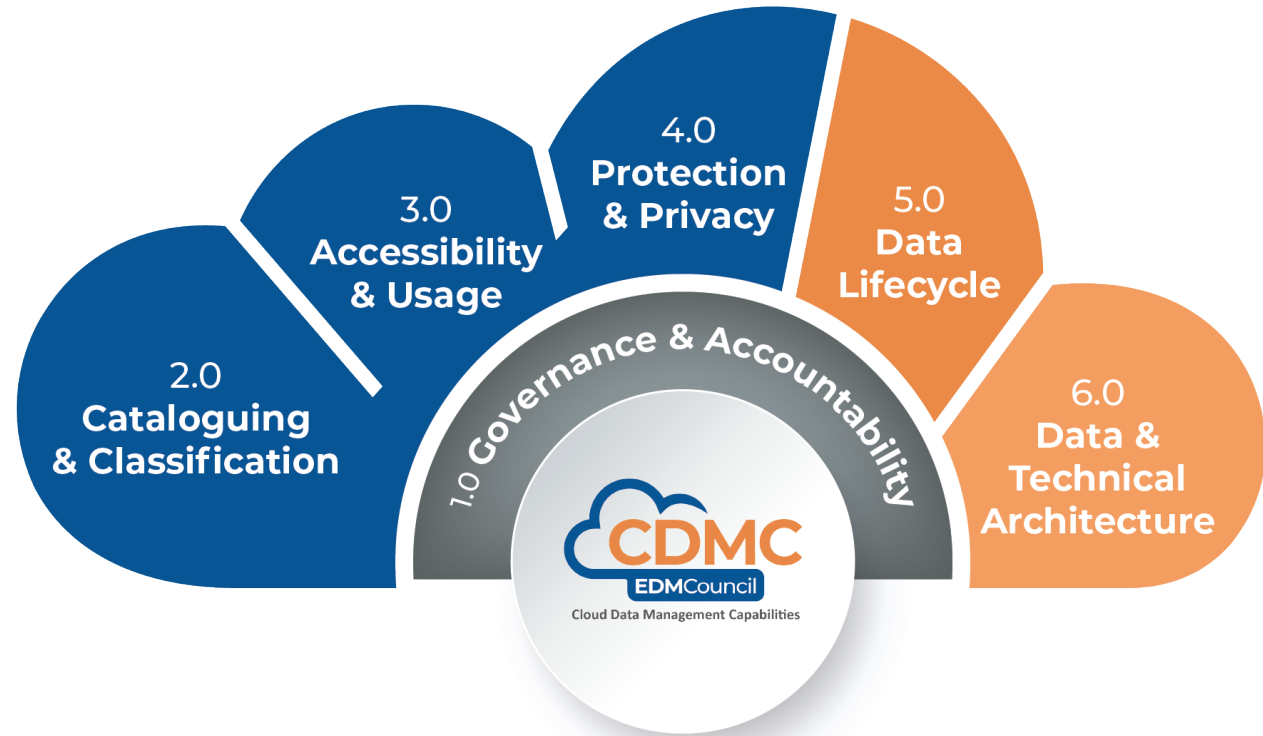
160+ Pages

6 Components

14 Capabilities

37 Sub-capabilities

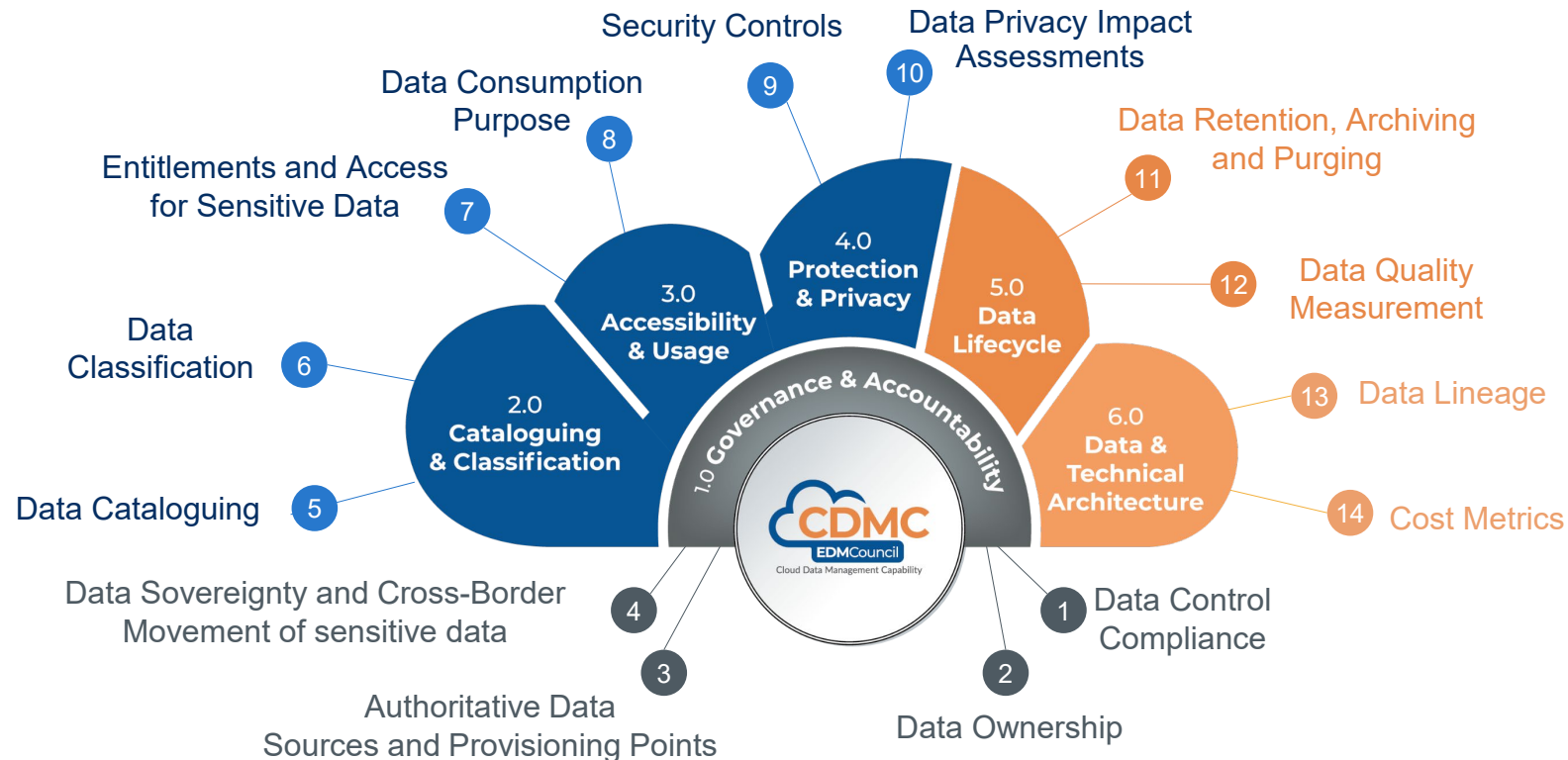
14 Key Controls



Best practice framework for the migration, management, and enablement of sensitive data in cloud

Automated Protection of Sensitive Data

Cloud Data Management Capabilities (“CDMC”) - 14 Key Controls for Managing Data Risk

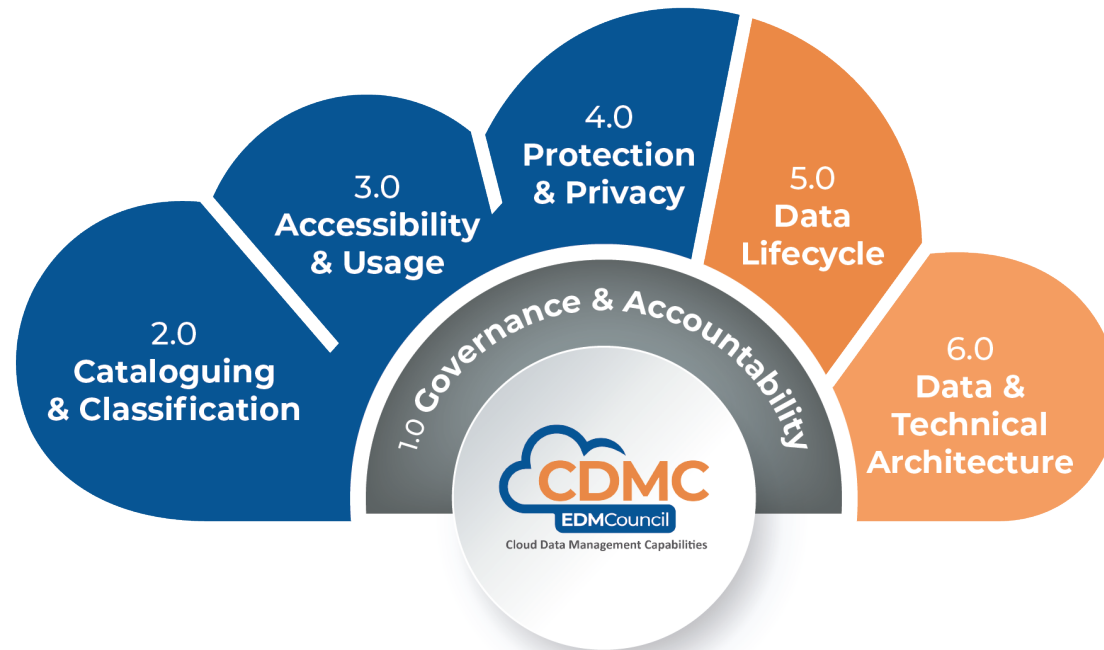


Sensitive Data

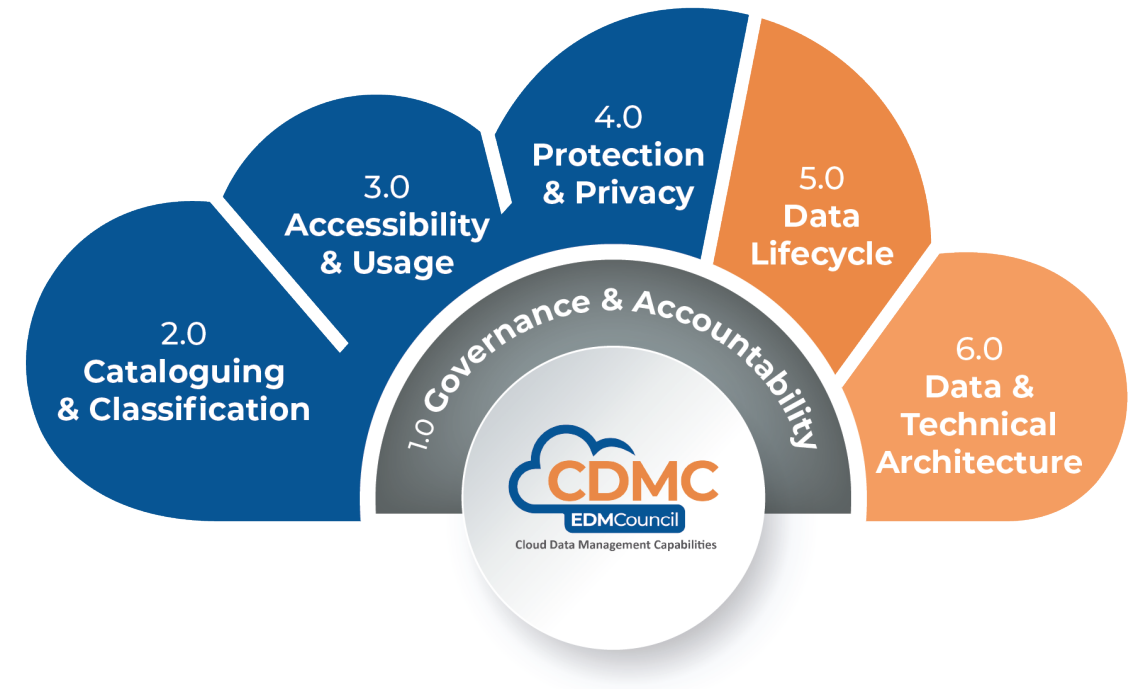
includes classifications such as:

- Personal Information (PI) / Sensitive Personal Data
- Personally Identifiable Information (PII)
- Personal Health Information (PHI)
- Company or Client Identifiable Information
- Material Non-Public Information (MNPI)
- Specific Information Sensitivity Classifications (such as 'Highly Restricted' and 'Confidential')
- Critical Data Elements used for important business processes
- Licensed data

CDMC Overview – Six Components



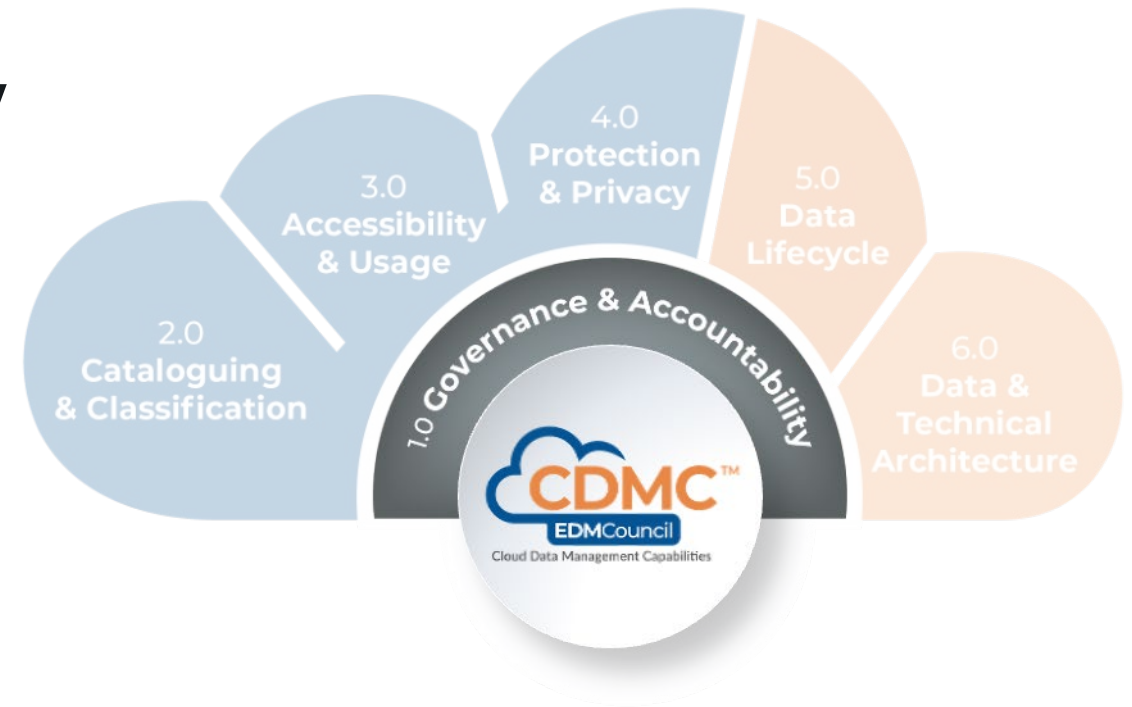
CDMC Overview – Six Components



CDMC Overview – Six Components

1.0 Governance & Accountability

Organizations need to ensure they have clear governance, accountability and controls for data migrated to or created in 3rd party environments

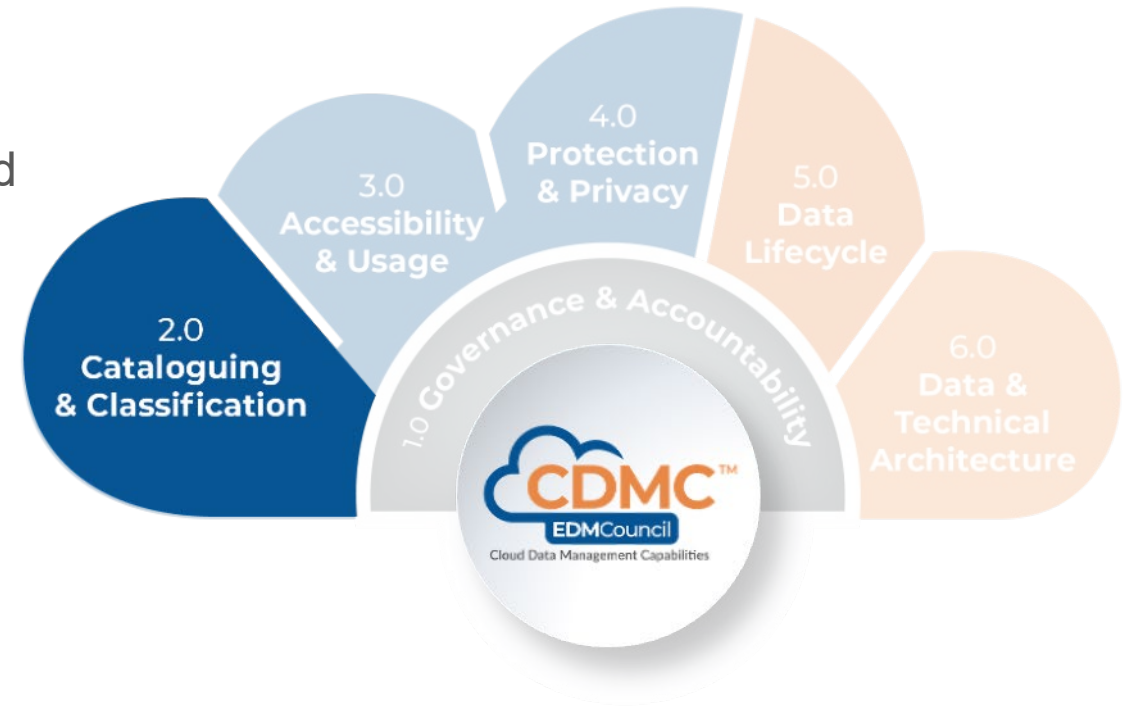


CDMC Overview – Six Components

2.0 Cataloguing & Classification

It is a key requirement to know what data is in the cloud and how sensitive that data is.

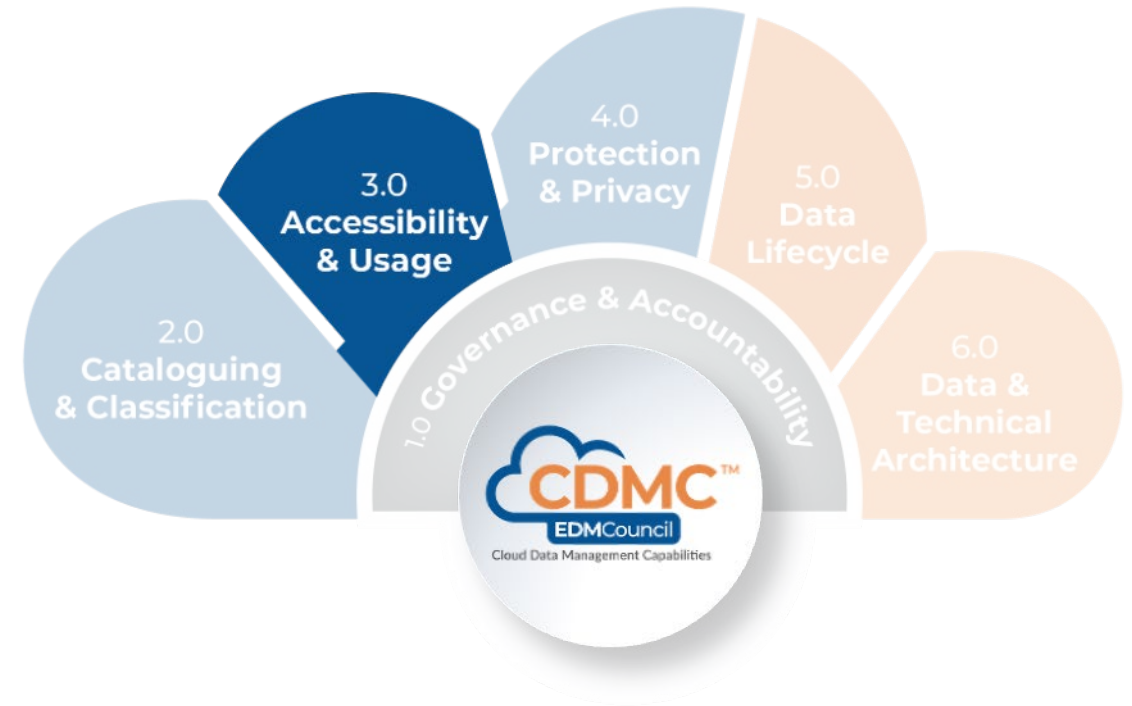
Recording this is fundamental ...



CDMC Overview – Six Components

3.0 Accessibility & Usage

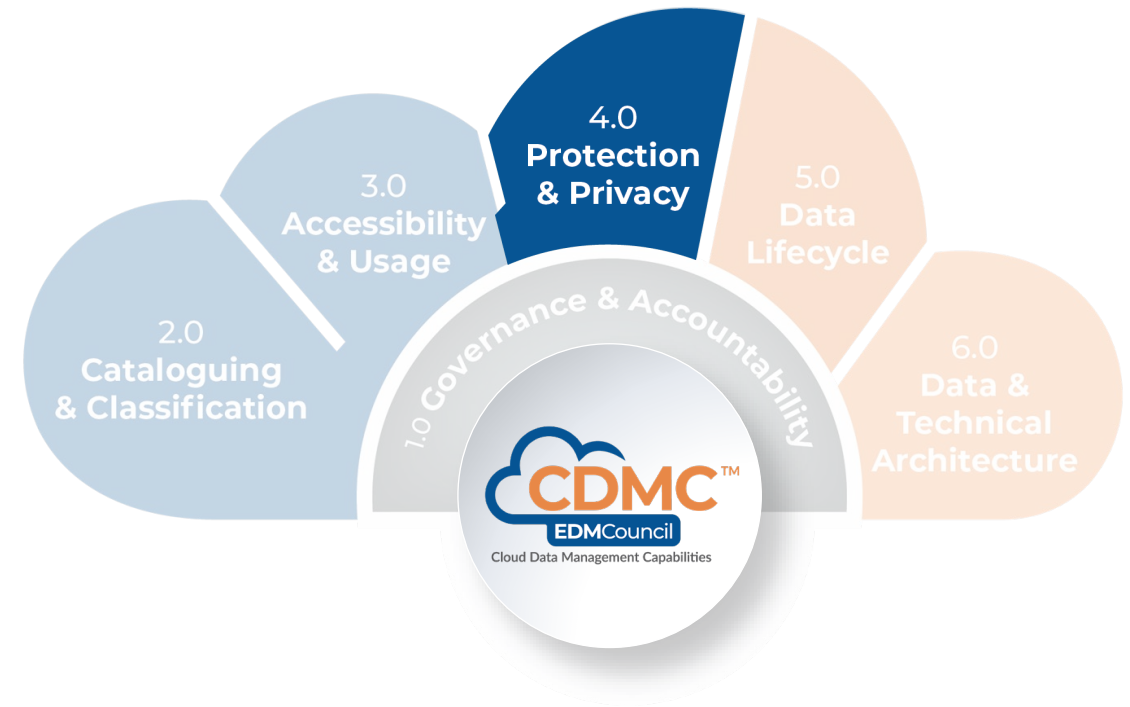
...to automating control of the access to and use of the data ...



CDMC Overview – Six Components

4.0 Protection & Privacy

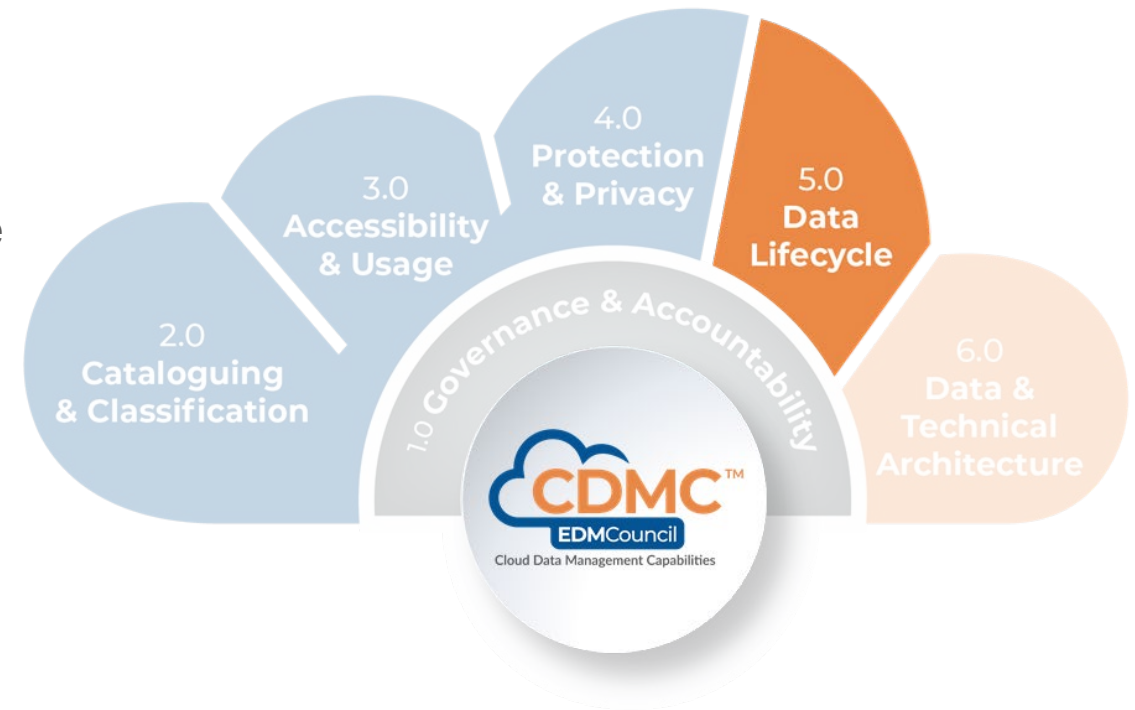
...and to enforcing the required levels of transparency, security and protection



CDMC Overview – Six Components

5.0 Data Lifecycle

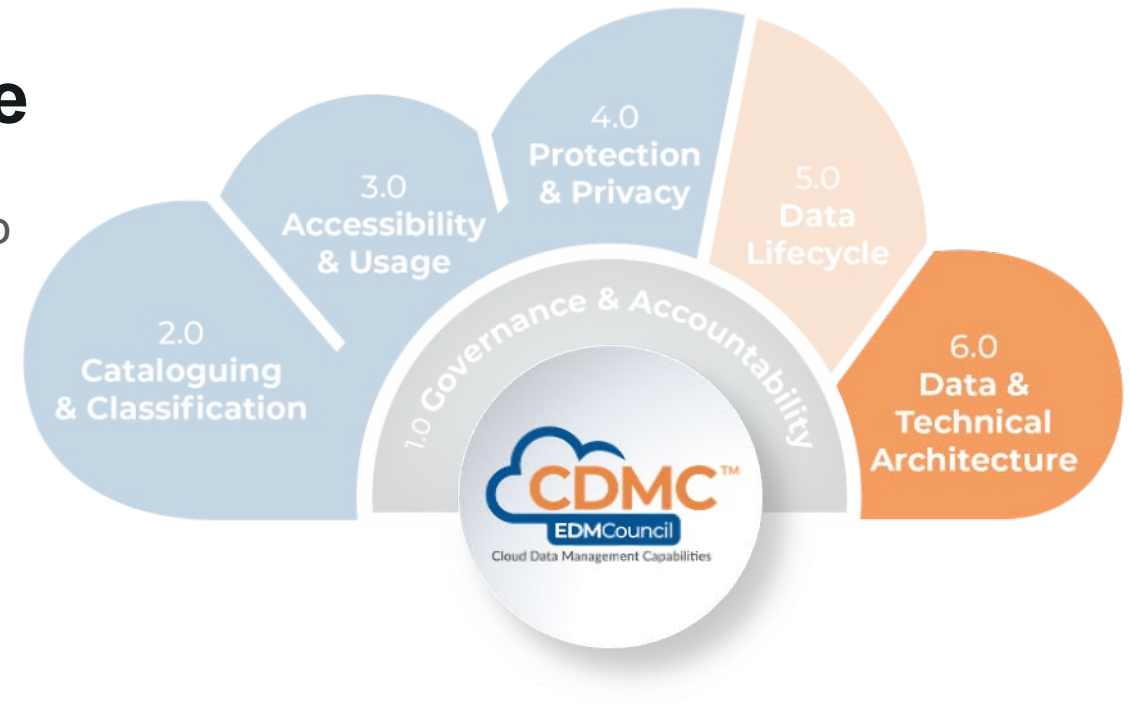
These controls apply throughout the data lifecycle, along for the need to ensure that data is fit-for-purpose and to manage its retention and archiving



CDMC Overview – Six Components

6.0 Data & Technical Architecture

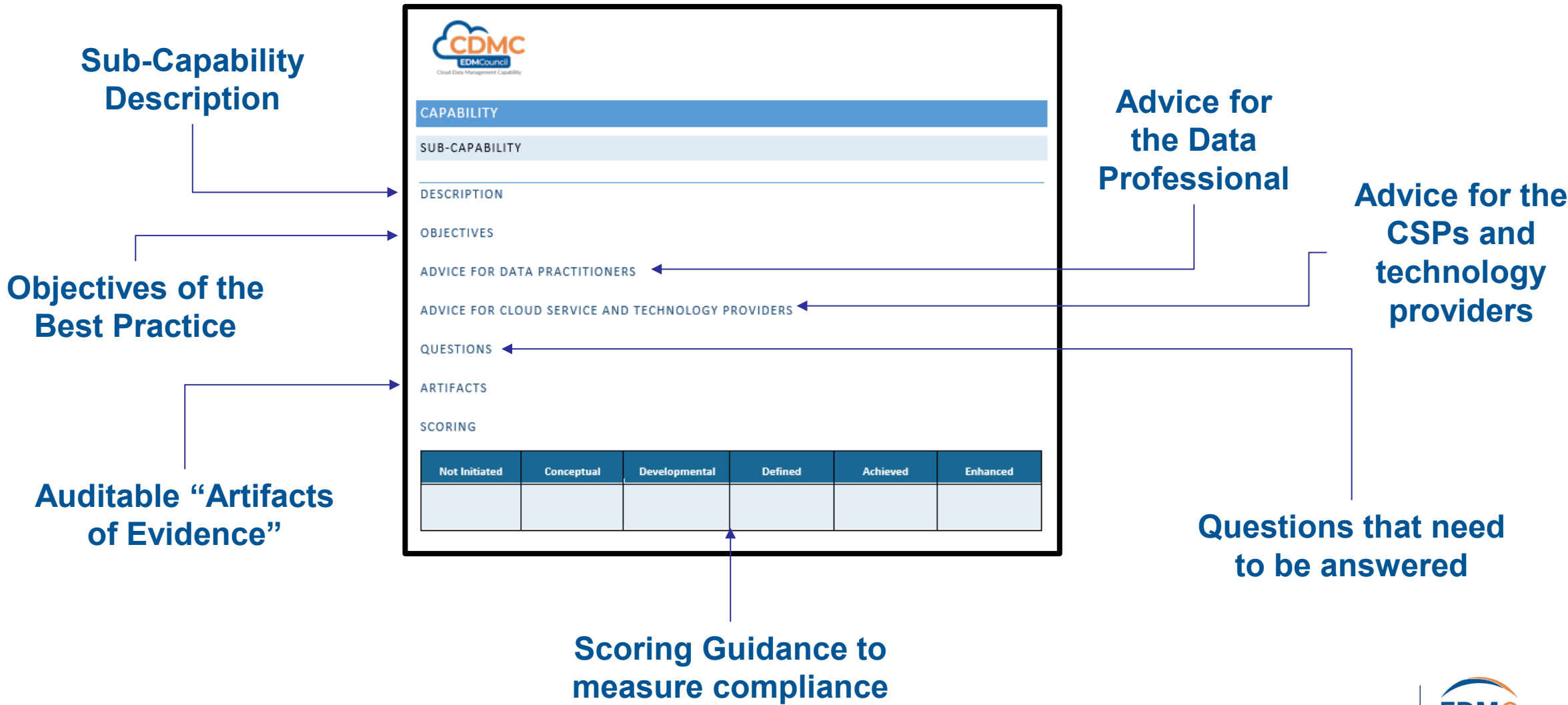
As with data on-premises, the design of the data and the design of supporting technology are fundamental to ensuring that business objectives are met



CDMC – Components, Capabilities & Sub-Capabilities

Component		Capability	Sub-Capability
1. Governance & Accountability		1.1 The Cloud Data Management business case is defined and measurable	1.1.1 Cloud data management business cases are defined 1.1.2 Cloud data management business cases are governed and syndicated
		1.2 Data ownership established for both migrated & cloud-generated data	1.2.1 Data Owner roles and responsibilities are defined and agreed 1.2.2 Data ownership is established in the Cloud
		1.3 Data sourcing and consumption are governed and supported by automation	1.3.1 Data sourcing is managed and authorized 1.3.2 Data consumption is governed and supported by automation
		1.4 Data Sovereignty and Cross-Border Data Movement are actively managed	1.4.1 Sovereignty of data is tracked 1.4.2 Data Sovereignty and Cross-Border Data movement risks are mitigated
2. Data Cataloguing & Classification		2.1 Data catalogues are implemented, used and interoperable	2.1.1 Data cataloguing is defined, scoped and actively used 2.1.2 Metadata is discoverable, enriched, managed and exposed in Data Catalogues 2.1.3 Data catalogues are interoperable across multi and hybrid cloud environments
		2.2 Data classifications are defined and used	2.2.1 Data classifications are defined and approved 2.2.2 Data classifications are applied and actively used
3. Accessibility & Usage		3.1 Data entitlements are managed, enforced and tracked	3.1.1 Data entitlement rights and obligations are captured as metadata 3.1.2 Data entitlement rights are enforced 3.1.3 Automated access and entitlement tracking is established
		3.2 Ethical access, use, and outcomes of data are managed	3.2.1 Data Ethics organization structures are established 3.2.2 Data Ethics processes are operational
4. Protection & Privacy		4.1 Data is secured, and controls are evidenced	4.1.1 Encryption policies are defined and enforced for data at rest, in motion, and in use 4.1.2 Implementation of data security controls is evidenced 4.1.3 Data obfuscation techniques are defined, scoped and applied 4.1.4 A Data Loss Prevention program is in place
		4.2 A data privacy framework is defined and operational	4.2.1 A data privacy framework is defined and agreed 4.2.2 The data privacy framework is operational
5. Data Lifecycle		5.1 The data lifecycle is planned and managed	5.1.1 A data lifecycle management framework is defined and adopted 5.1.2 The data lifecycle is implemented and managed
		5.2 Data quality is managed	5.2.1 Data Quality rules management is established 5.2.2 Data Quality measurement is established and operational 5.2.3 Data Quality metrics reporting is established and operational 5.2.4 Data Quality issue management is established and operational
6. Data & Technical Architecture		6.1 Technical design principles are established and applied	6.1.1 Optimization of cloud use and cost efficiency is facilitated 6.1.2 Principles for data availability and resilience are established and applied 6.1.3 Backups and point-in-time recovery are supported 6.1.4 Portability and exit planning are supported
		6.2 Data provenance and lineage are understood	6.2.1 Multi-environment lineage discovery is automated 6.2.2 Data lineage changes are tracked and managed 6.2.3 Data lineage reporting and visualization are implemented

CDMC – Structure



Training, Certification & eLearning

EDM Council offers certification programs to meet your needs and schedule

**Instructor-Led,
Live, Virtual
Training**

eLearning

**Dedicated
Company
Classes**



CDMC Assessment & Certification



For Organizations:
**Certification based on the
Complete CDMC Framework**

CDMC Readiness Assessments

- Determine gap areas
- Companies can self-assess or engage CDMC Partners

Certification Assessments

- Conducted by independent CAP Partners
- Certification requires achieving all CDMC Framework sub-capabilities and evidencing all 14 Key controls
- EDMC issues a digital “CDMC Certified Business” Digital Badge valid for 12 months



**For Cloud Service
& Solution Providers:**
**Certification based on the
CDMC 14 Key Controls &
Automations**

CDMC Certified Solutions

- Conducted by independent CAP Partner executing specific or all 14 key controls & automations
- EDMC issues a digital “CDMC Certified Solution” Digital Badge valid for 12 months

Microsoft, Google Cloud, BigID, Informatica Announce CDMC Automated Data Risk Control Framework Certification



March 20, 2023 • 5 min read

Microsoft achieves first native Cloud Data Management Capabilities certification

Mike Flasko Vice President and General Manager, Data Governance



March 2023



EDM Council Designates Google Cloud as a Certified Cloud Solution

Mon, Jun 26, 2023



June 2023



BigID Sets Industry Milestone with CDMC Framework Certification

Mon, Jul 29, 2024



July 2024



Informatica's AI-Powered Intelligent Data Management Cloud Platform Now Certified for the EDM Council's Cloud Data Management Capabilities Framework

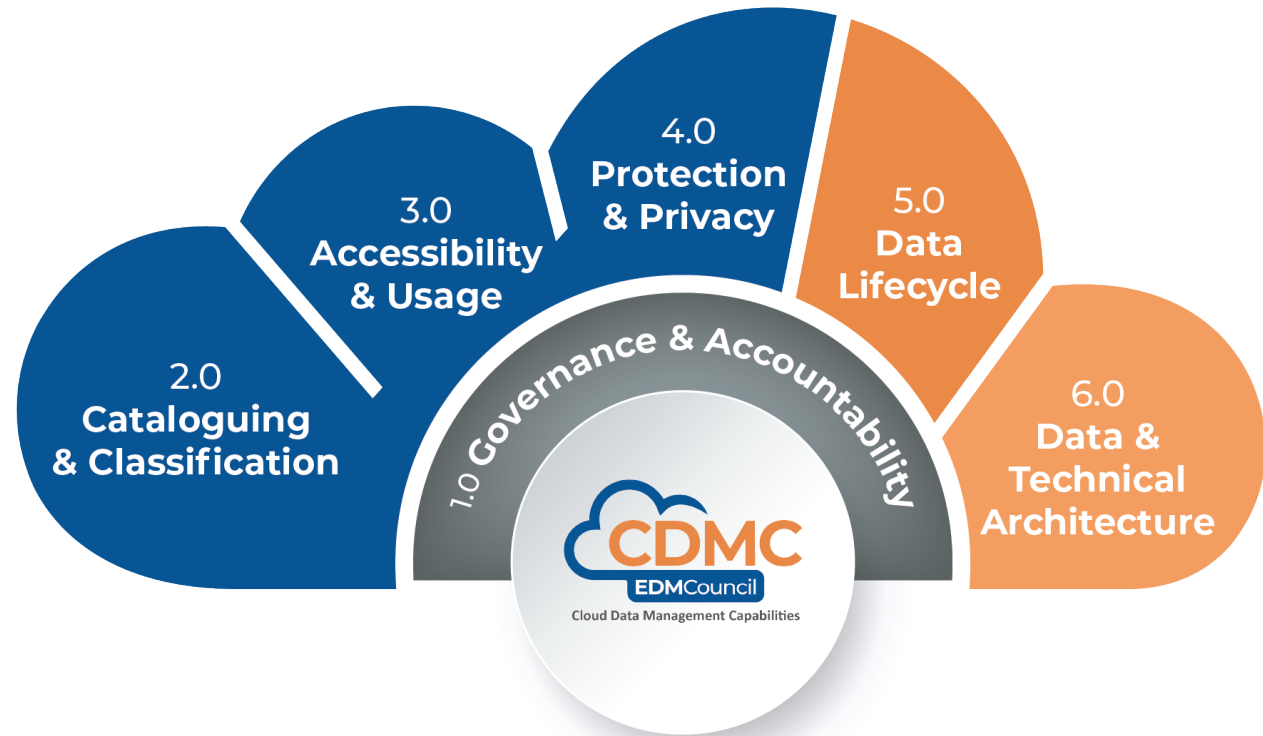
Thu, Jan 30, 2025



January 2025

CDMC Framework

160+ Pages
6 Components
14 Capabilities
37 Sub-capabilities
14 Key Controls



Best practice framework for the migration, management, and enablement of sensitive data in cloud

To Learn more...

Free license – Download at:
EDMCouncil.org > Frameworks > CDMC





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COP Program

Open SME Working Groups focused on collaborative research and analysis of current data management and analytic industry topics

Data Analytics
AI/ML/GenAI



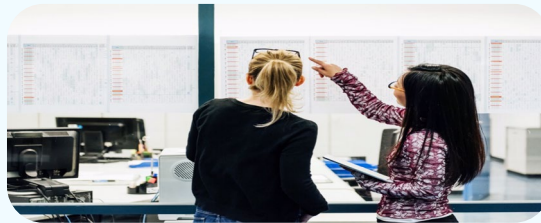
Data Marketplace / Data
Product



Data ROI



ESG Data Management



Women Data
Professionals



Data Risk



U.S. Public Sector Forum



Data Management for
Asset Managers



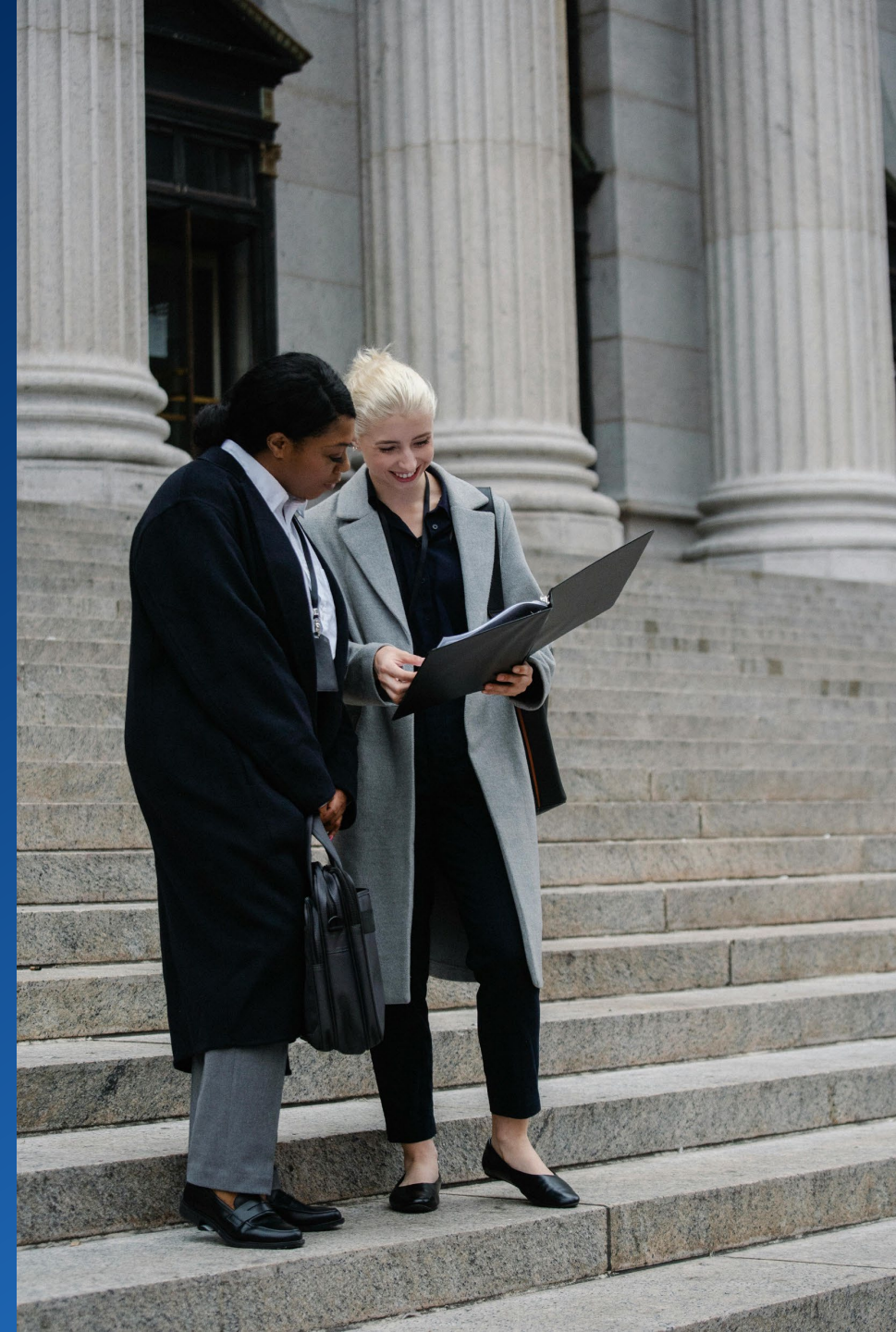
U.S. Public Sector Forum

Collaborate with the **public sector** and **industry partners** to advance data management best practices.

- Join the next U.S. Public Sector Forum Meeting:
 - Date & Time: *Thursday, June 5th, 11:00 am – 12:30 pm EDT*
 - Featured Knowledge Series presentation by Indiana Management Performance Hub



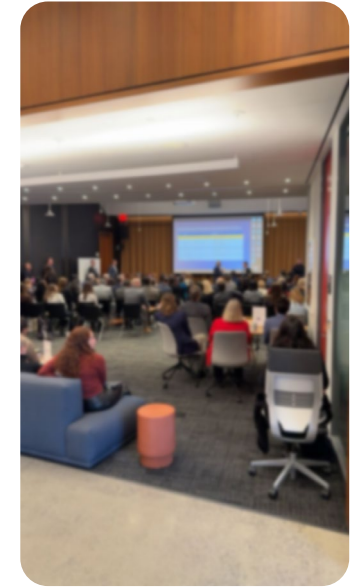
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Thought Leadership Series In-person Regional Events & Virtual Webinars



Regional In-Person Events



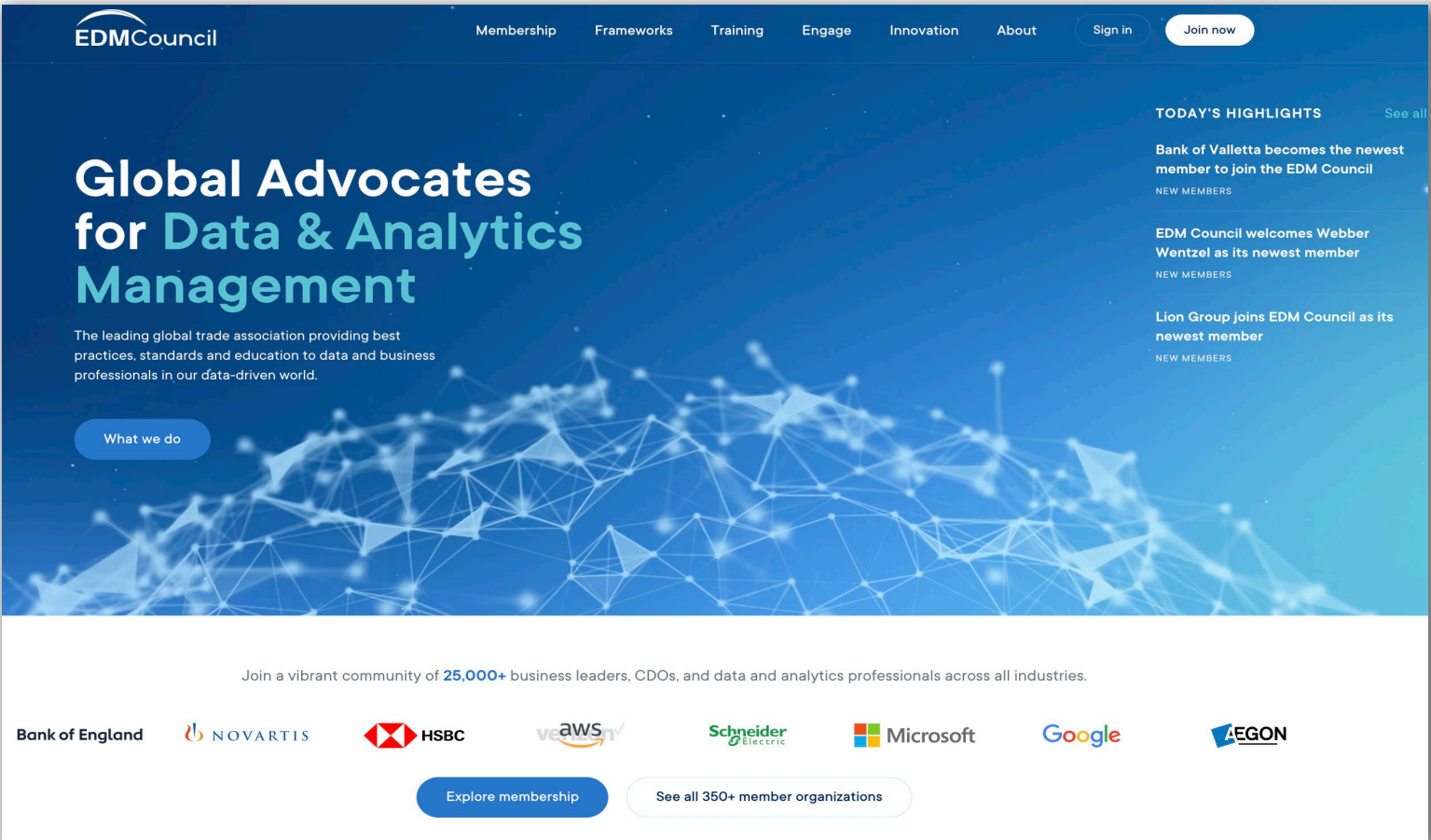
Largest Global Summit for Women Data Leaders

EDM Webinar

Attend 50 EDMWebinars per year
and access the historical recordings

Register – *ALL are welcome!*
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 **350+ Member Firms**
Cross-industry,
including Regulators

 **25,000+**
Professionals

 **Worldwide**
Americas, Europe,
Africa, Asia, Australia

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MPH Data Day 2025 – May 14

Jim Halcomb – *Chief Research & Development Officer*, EDM Council

John Stark – *Director of Data Governance*, Indiana Management Performance Hub

 EDMCouncil®

Fireside Chat: *Practical Application of EDM Council's Frameworks in the State of Indiana*

Moderator



Jim Halcomb

Chief Research & Development Officer
EDM Council

Speaker



John Stark

Director of Data Governance
Management Performance Hub





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Member Support Team: membersupport@edmcouncil.org


EDM Council®

Thank You!!!

