



Washington's Consolidated Technology Services Agency

Technology Services Board

Portfolio/Policy Subcommittee Meeting
May 12, 2022
10:00 a.m. – 12:00 p.m.

Current TSB Members

Industry Members

Butch Leonardson – Retired CIO

Paul Moulton – Retired CIO

Tanya Kumar – T-Mobile

Legislative Members

Rep. Matt Boehnke – House R

Rep. David Hackney – House D

Sen. Joe Nguyen – Senate D

Executive Branch (Agency Directors)

Bill Kehoe – State CIO & Chair

David Danner – UTC

Tracy Guerin – DRS

Vikki Smith – DOR

Other Government

Viggo Forde – Snohomish County

Vacancies:

Senate Representative

Labor Union Representative

Members present

Members absent

Agenda

TOPIC	LEAD	PURPOSE	TIME
Welcome / Agenda Review	Bill Kehoe	Introduction	10:00
Approve Minutes from April 14 Subcommittee Meeting	Bill Kehoe	Approval	10:09
Program Status – Health and Human Services (HHS) Coalition <ul style="list-style-type: none"> Sue Birch, Director, Health Care Authority Les Becker, Deputy Secretary for Innovation and Technology, Department of Health Cathie Ott, IT Strategic Advisor, Health Care Authority Rich Pannkuk, Deputy Assistant Secretary of Facilities, Finance & Analytics, Department of Social & Health Services Dan Renfro, HHS Coalition Governance Manager, Health Care Authority 	David Sorrell	Program Status/Discussion	10:10
Program Status – One Washington <ul style="list-style-type: none"> Cristie Fredrickson, Executive Sponsor, OFM John Anderson, Executive Director for Technology Transformation, ISG Scott Nicholson, OneWA Executive Director, OFM Tomy Mollas, Organizational Change Management Director, OFM 	Amy Pearson	Program Status/Discussion	10:40
IT Project Oversight Transformation Project Update	Nicole Simpkinson	Project Update/Discussion	11:10
Public Comment			11:30



Approve 04/14/2022 Minutes





Washington's Consolidated Technology Services Agency

Health and Human Services Coalition

TSB Portfolio/Policy Subcommittee Meeting
May 12, 2022

Members of the HHS Coalition



Ex-Officio Advisors

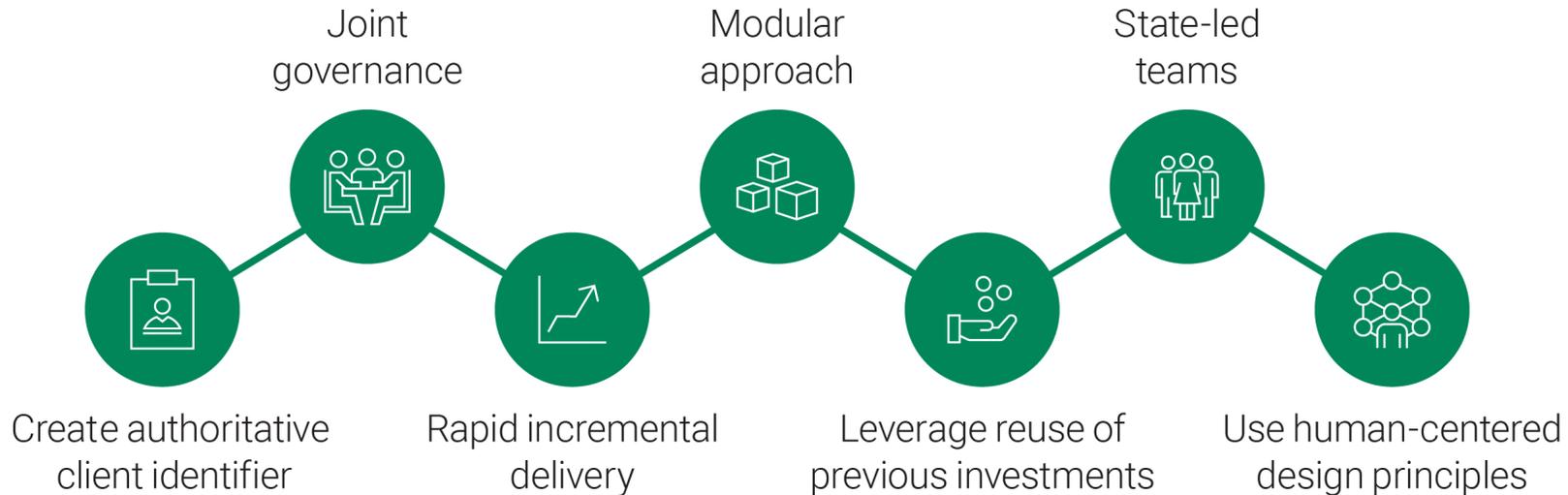


Office of Financial Management
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Washington State - Office of the
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HHS Coalition IT Vision and Enabling Strategies 2021-2024



HHS Coalition Portfolio Process

Coalition Project Criteria



Impact on shared business outcome for 2+ organizations

OR

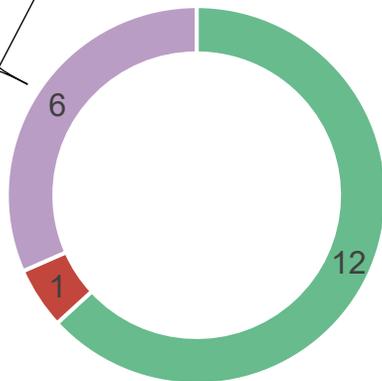


Maximizes federal funding (CMS) available to the state

Coalition Portfolio

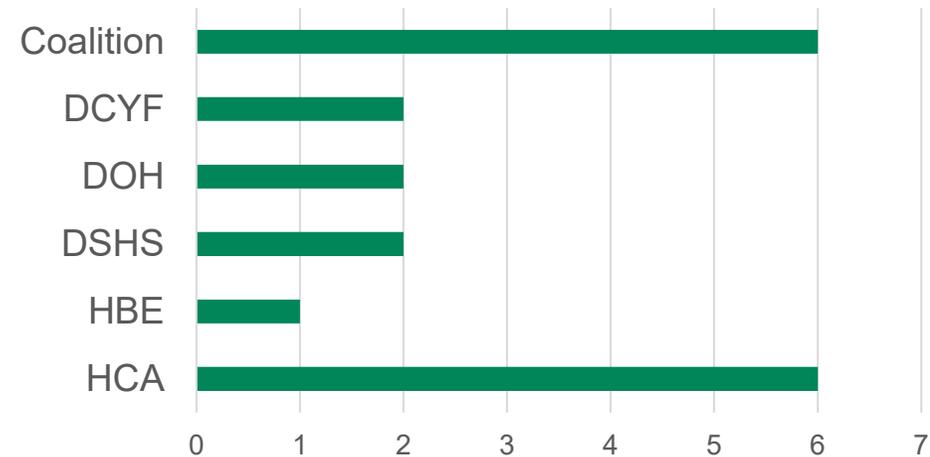
Projects by Category

Master Person Index Project, Integrated Eligibility & Enrollment Program



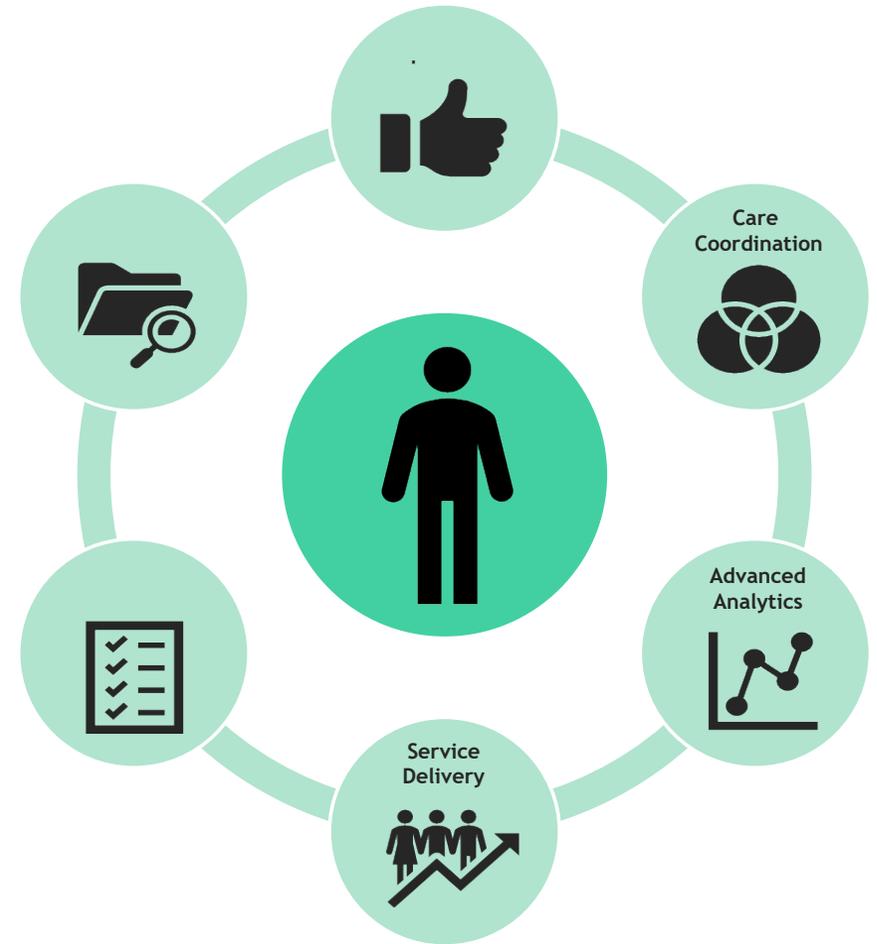
- Coalition Project
- Enhanced Collaboration Project
- Enterprise-Wide Project

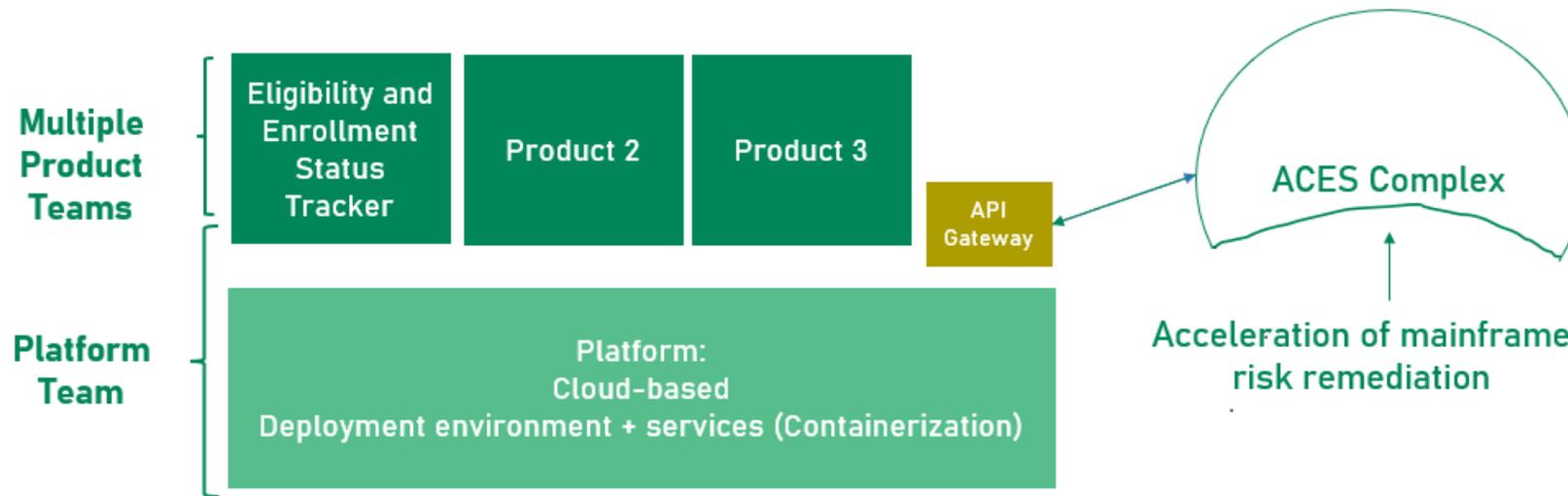
Projects by Organization



Enterprise-Wide Project: Master Person Index (MPI)

- Identity matching solution that is core to Integrated Eligibility intake and data exchange.
- MPI integration layer design complete and in development.
- First system will be connected in fall 2022.



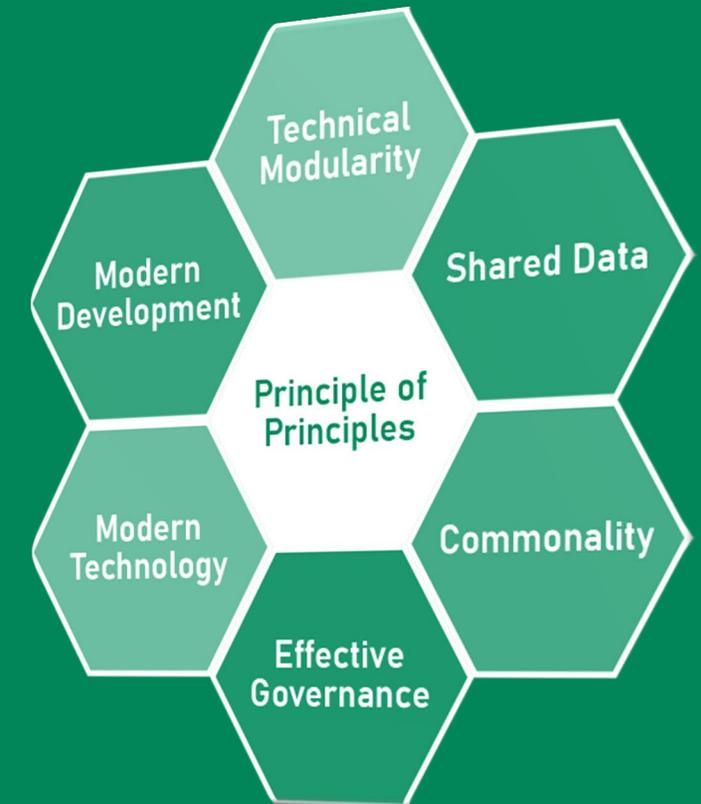
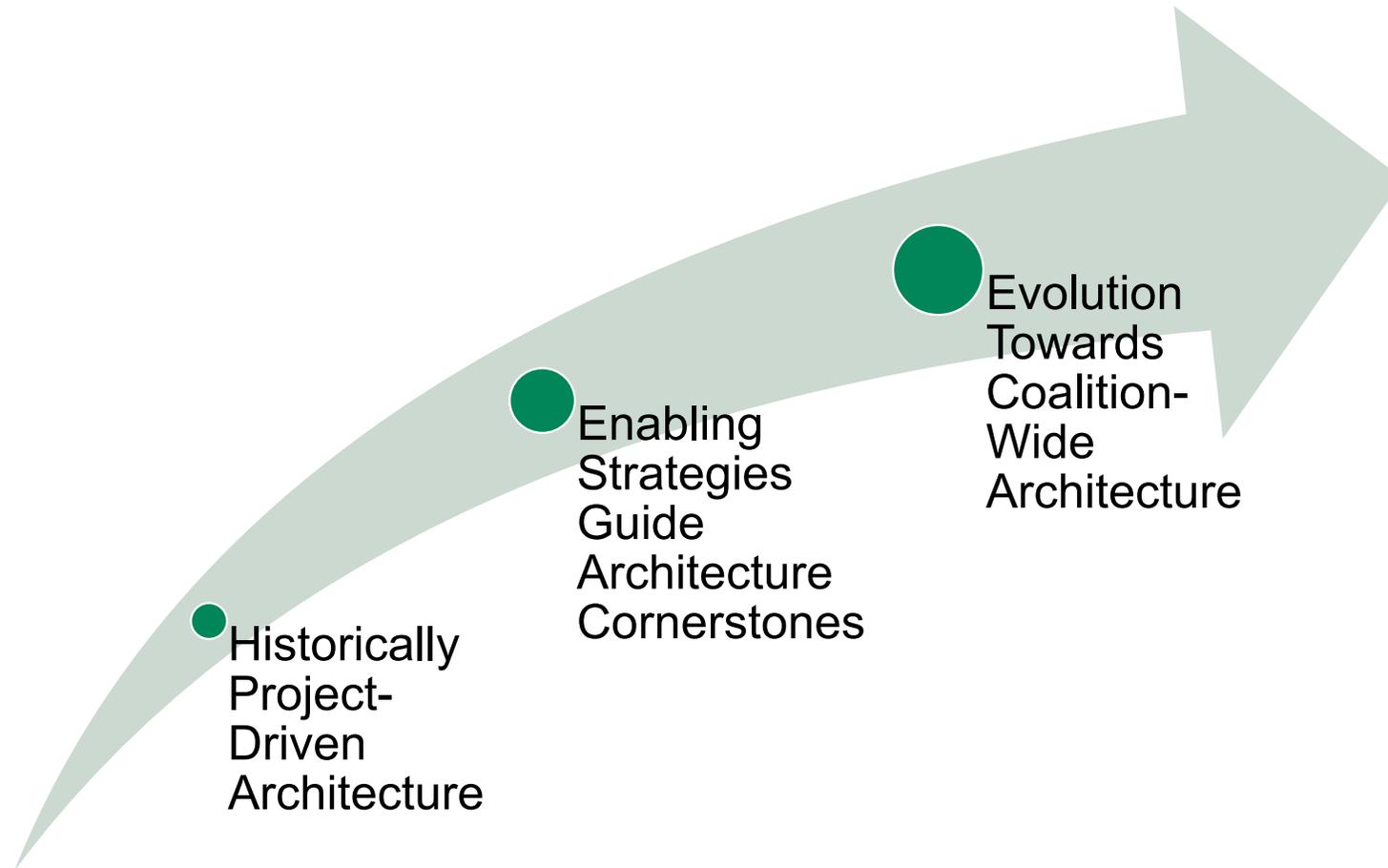


Enterprise-Wide Project: Integrated Eligibility & Enrollment (IE&E) Program

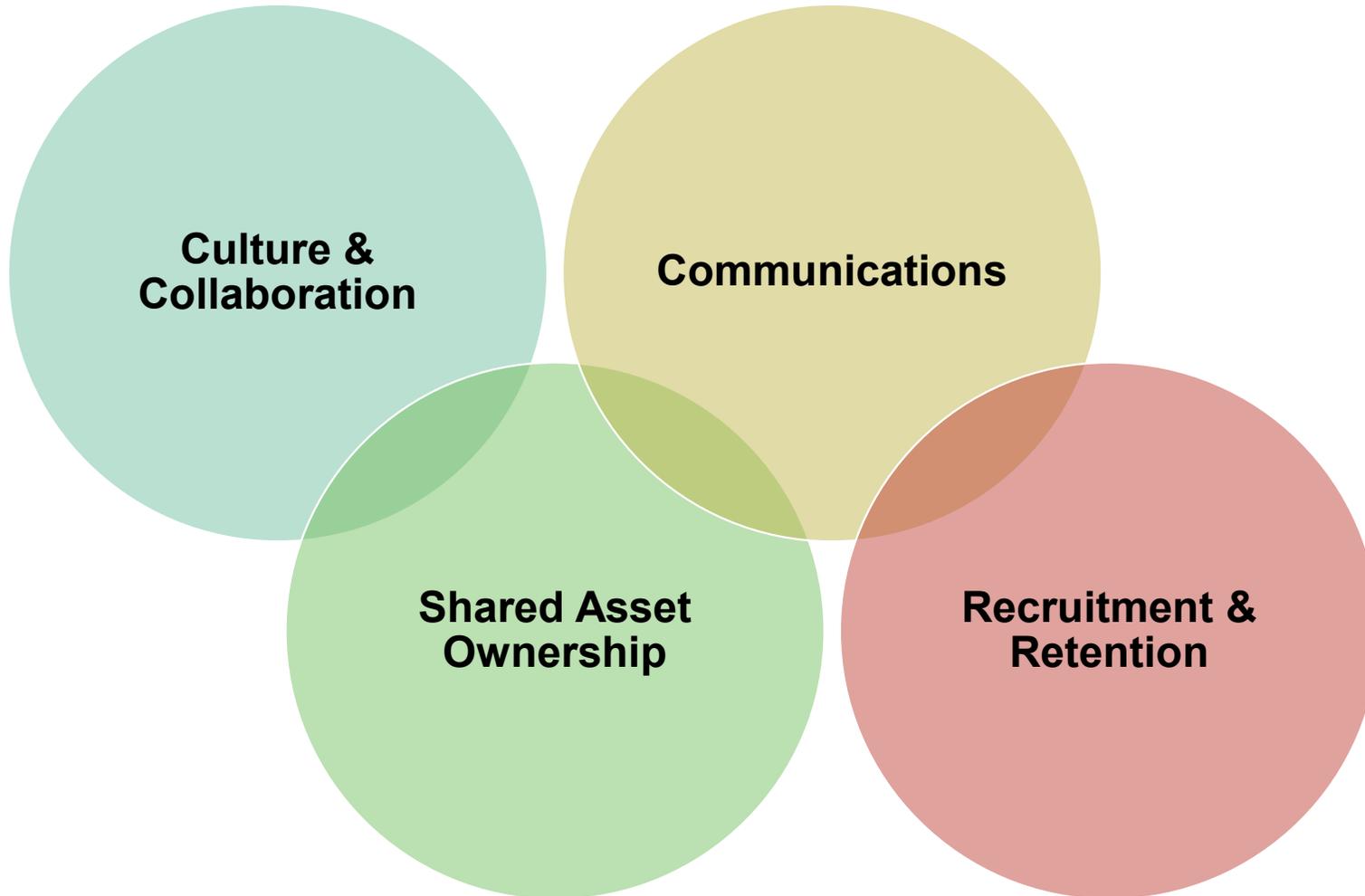
- Roadmap outlines vision and plan for incremental development of IE&E services for 75 HHS programs.
- Foundational platform and first product have been defined and initial procurements are underway.

Coalition Integration Architecture

Shifting from Project-Driven to Enterprise-Wide



Coalition Challenges



Contact Info



Dan Renfroe
HHS Coalition Governance Manager
360-622-1346
HHSCoalition@hca.wa.gov

Resources



[HHS Coalition Legislative Report 2021](#)
[HHS Coalition IT Strategy 2021-2024](#)



Washington's Consolidated Technology Services Agency

Office of Financial Management One Washington

TSB Portfolio/Policy Subcommittee Meeting
May 12, 2022



One Washington
A Business Transformation Program

Agenda



1. Welcome
2. Program Updates
3. The Way Forward: Deployment Approach
4. Q&A



Welcome / Program Updates

Cristie Fredrickson



Program Updates: Two Key Risk Areas



Funding Overview & Status

- Re-evaluated spending plan to align with 21-23 Biennial budget
- Initiated recruitment for limited positions, based upon funding and priority
- Provided notice to impacted contractual partners

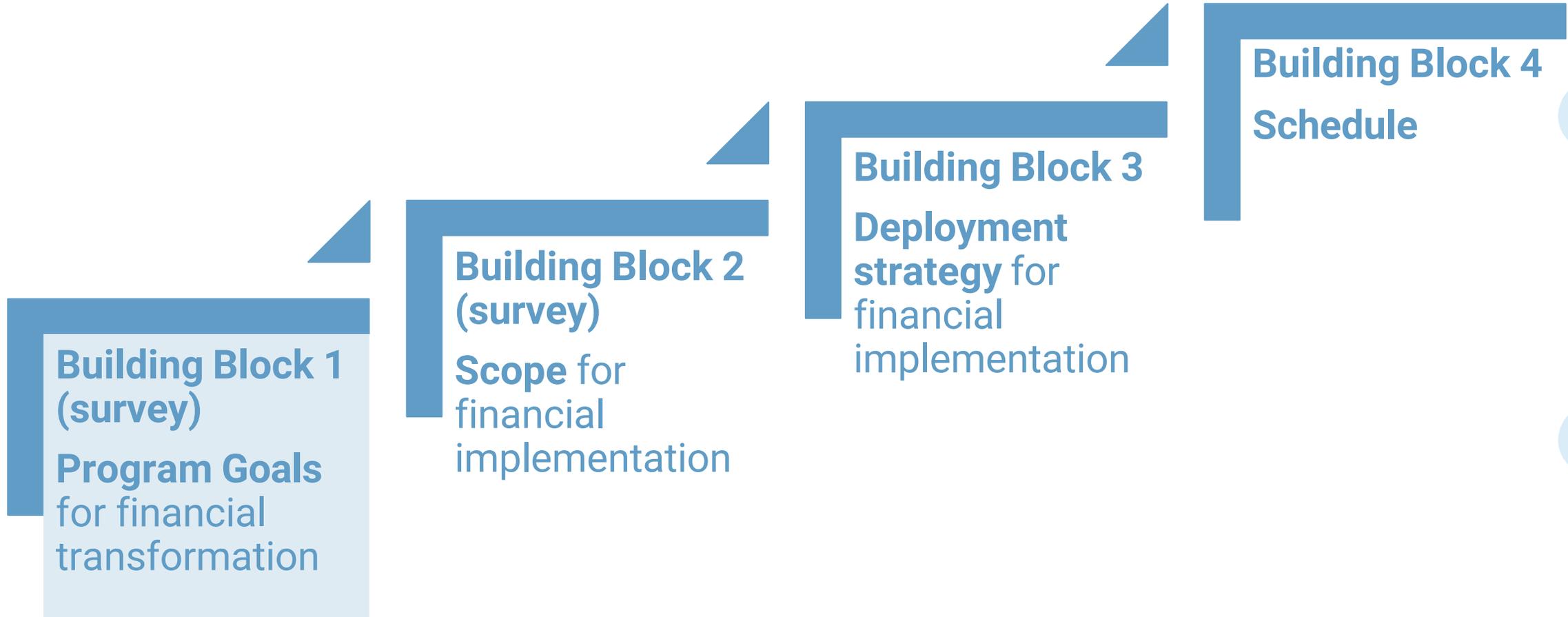
Systems Integrator (SI) Negotiation Status

- Continued regular and frequent interaction
- Continue to make forward progress

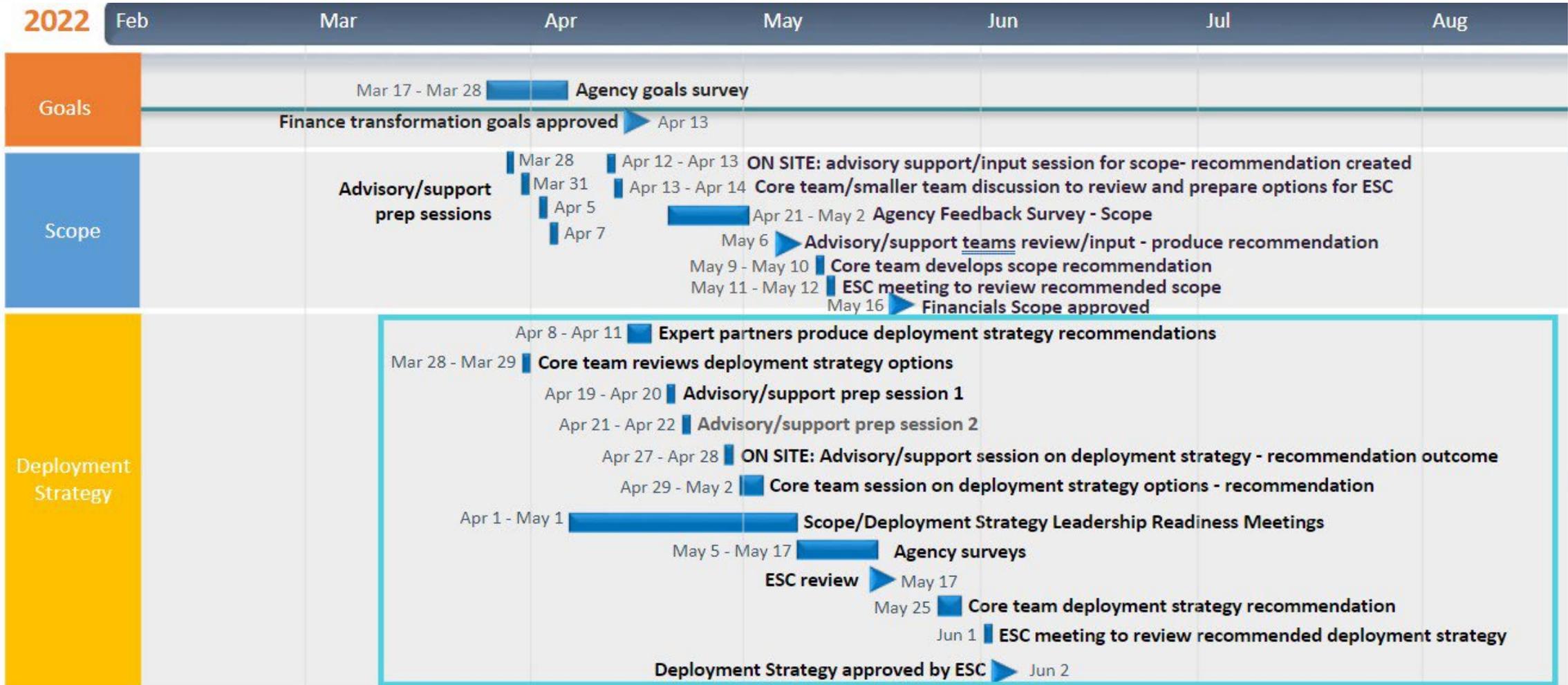
The Way Forward: Deployment Approach

Scott Nicholson
John Anderson
Cristie Fredrickson
Tomy Mollas

TWF Building Blocks



Pathway to ESC Decision



OneWA Deployment Approach History



► Prior to 2019 (example)

Deployment Waves

Wave	Agency Phasing
Description	Wave 1: Initial Release Wave 2: Full Deployment Release – For agencies with complex business processes. This lowers technical risks, provides a longer runway for organizational change management efforts, and decreases the risk to target go-live dates Wave 3: Expanded Functionality Release
Initial Release Wave 1 - July, FY22	<ul style="list-style-type: none"> Office of Financial Management (OFM) Office of the Governor (GOV) Washington Technology Solutions (WaTech) Department of Enterprise Services (DES) (+ small agencies except for Payroll only) Department of Corrections (DOC) Services for the Blind Washington State Treasurer (TRE) Department of Health (DOH) Utilities and Transportation Commission (UTC) University of Washington (UW) (*Integration only)
Full Deployment Release Wave 2- July, FY23	<ul style="list-style-type: none"> All other agencies
Expanded Functionality Release Wave 3 – July, FY24	<ul style="list-style-type: none"> Agencies that require expanded functionality to meet their business needs

► After 2019 (current)

Business Functions by Implementation Phase: Phases 0-3 through Year 2025



Deployment Definition/Context



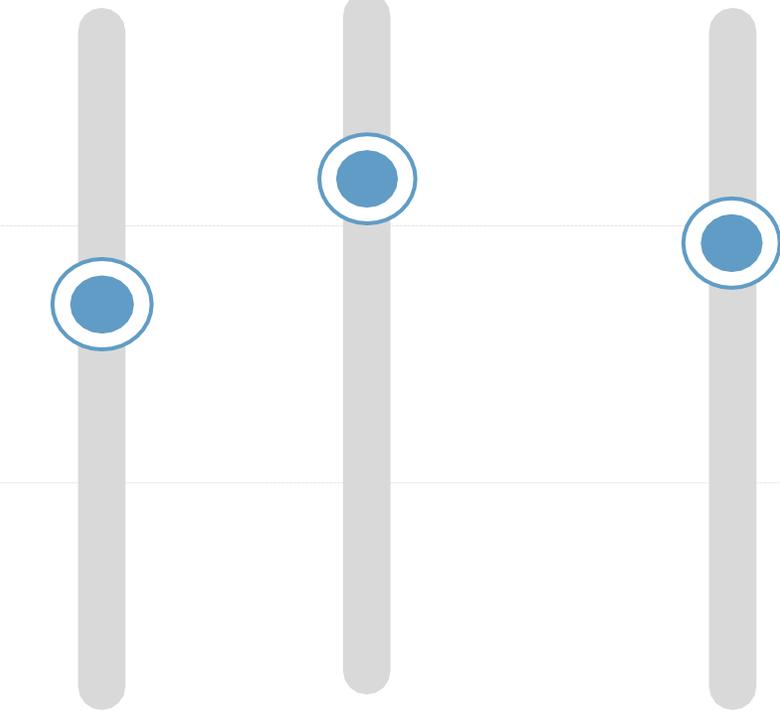
- Deployment refers to the method and timing by which Workday will be implemented
- The Deployment Approach assessment from the Way Forward Team is limited to the first financial release, does not apply to future functionality releases
- Options under assessment range from a single deployment of first financial release functionality to all agencies, to a waved release by agency cohorts with multiple deployments over time



Deployment Approach Levers

System of Record **Legacy System Remediation** **Agency Cohorts/Deployments**

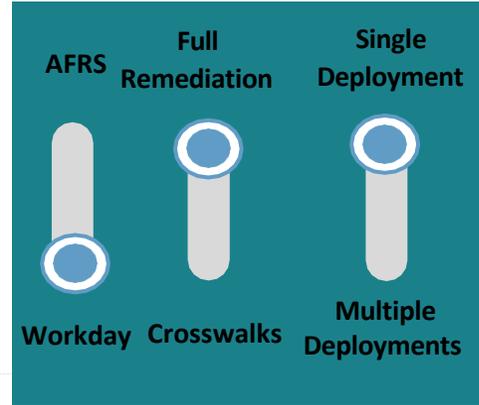
Workday **Full Remediation** **Single Deployment**



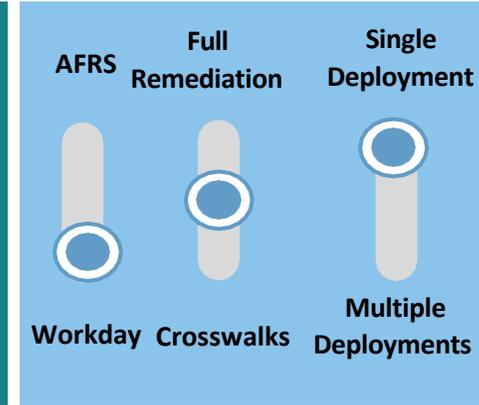
AFRS **Crosswalks** **Multiple Deployments**

Approach

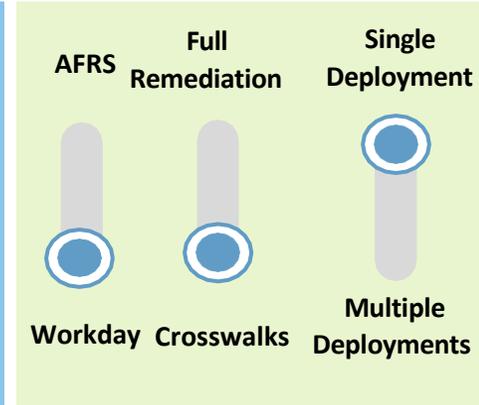
Example 1: All Agencies, Full LSR



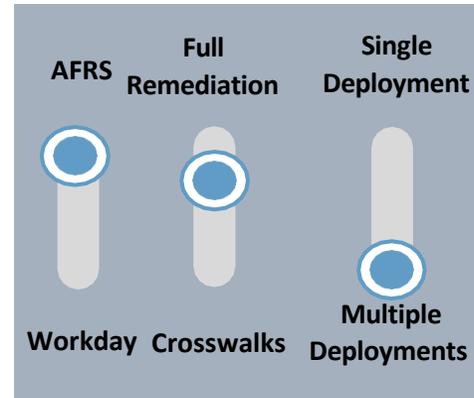
Example 2: Single Deployment with some agencies doing LSR



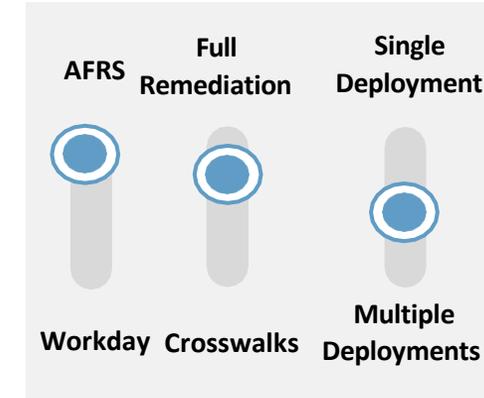
Example 3: Single deployment, All agencies cross-walked



Example 4: Multiple agency cohort (waves)



Example 5: Two agency cohort waves (pilot)



Key Criteria to Assess Deployment Approach



Benefits	<ul style="list-style-type: none"> • Programmatic Benefits (e.g., timeline / funding / resources) • Business Benefits (e.g., audit efficiencies, manual process reduction / workarounds, system of record) • Technical Benefits (e.g., temporary integrations, decommissioning AFRS, data integrity, security) • People Benefits (e.g., organizational change management, self service) • Sustainment Benefits (e.g., Workday operational model post go-live) • Adoption Benefits (e.g., agencies system, processes, and thinking modernization)
Risks	<ul style="list-style-type: none"> • Programmatic Risk (e.g., timeline / funding / resources) • Business Risk (e.g., audit findings, manual processes / workarounds, system of record) • Technical Risk (e.g., temporary integrations, resuscitating AFRS, data integrity, security) • People Risk (e.g., organizational change management, training) • Sustainment Risk (e.g., Workday operational model post go-live) • Adoption Risk (e.g., agencies still using legacy systems, processes, and thinking)
Additional Considerations	<ul style="list-style-type: none"> • Level of Goal Alignment (e.g., support of financial transformation goals) • Time to Core Financial transformation (e.g., time it takes to get all agencies on to Workday) • Time to Enterprise-wide transformation (e.g., how long until all agencies remediated) • Agency Impact (e.g., impact on agencies and their staff, recruitment and retention) • Statutory considerations (e.g., required state and federal requirements and reporting)



The Way Forward: Getting Agency Feedback

On Thursday 5/5, we launched a survey to solicit your feedback on our third project building block: One Washington Deployment Strategy. Below are key details shared during our Deployment Strategy Overview Session hosted on Thurs., 5/5.

Deployment Strategy Survey Details:

Timing

The Way Forward: Deployment Strategy Survey Launch

Your agency's feedback is critical to our program's collective success. Below is a calendar view with key milestones and program support sessions to visually help AST Leads submit their deployment survey on time.

Monday	Tuesday	Wednesday	Thursday	Friday
May 1	2	3	4	5
			Check in Statistics Survey #3	AST Leads to complete Survey #3 (Deployment)
6	10	13	14	15
		10:00 AM Deployment Survey Office Hours (Open 10:00 AM - 12:00 PM)	10:00 AM Deployment Survey Office Hours (Open 10:00 AM - 12:00 PM)	
		AST Leads to complete Survey #3 (Deployment)		
16	17	18	19	20
Check in present updated - Overview Q&A	10:00 AM AST Leads Learning Plan			
		AST Leads to complete Survey #3 (Deployment)		
21	24	25	26	27
10:00 AM AST Leads Learning Plan		10:00 AM AST Leads Learning Plan	10:00 AM AST Leads Learning Plan	10:00 AM AST Leads Learning Plan
		Check in continue to analyze deployment strategy survey response		

- **On Thursday 5/5:** Survey (Deployment Strategy) launched to AST Leads after the TWF Deployment Overview session
- **Next Tuesday 5/17:** Survey (Deployment Strategy) closes at 5:00pm PDT

Content / Format

Tool to Assess Deployment Options

The Deployment Strategy survey may ask you to rank benefits and risks for different deployment options. This information will help the project better understand agency's needs and keep in consideration as what is needed for enterprise-wide success.

Deployment Strategy Benefits/Risk Matrix Tool (to fill out with agency separately)		Considerations to Keep in Mind
Deployment Approach: All Agencies	Deployment Approach: Waves	
Benefits		<ul style="list-style-type: none"> Adoption Agency Impact Business Level of Goal Alignment People Programmatic Customer Stakeholder considerations Technical Time to Core Financial Transformation Time to Enterprise-wide transformation Other
Risks		

Note: Your response will not be used for any specific deployment approach. These could be changed based on new information or business decisions made for the other TWF building blocks.

- [We sent the TWF Deployment Strategy survey to AST Leads](#) and request **one response per agency**
 - 13 mandatory questions
 - For conditional questions, shared an optional matrix tool to rank benefits/risks

Support



- **Wednesday 5/11 and Thursday 5/12:** This week, we are hosting two support sessions to address any questions as you complete and **submit your surveys.**

* The survey task was added to your Agency Readiness Checklist (ARC) during the Friday 4/29 ARC update.

Q&A



One Washington
A Business Transformation Program

IT Project Oversight Transformation Project Update

TSB Portfolio/Policy Subcommittee Meeting
May 12, 2022

Vision

State agencies, WaTech and the Office of Financial Management (OFM) work in partnership to implement successful, fiscally sound projects to further the delivery of essential government services.

IT project oversight is integrated, streamlined, and focused on highest value to ensure the best use of resources to support on time, on budget IT projects that deliver planned outcomes.



Business goals

1. Improve the IT project oversight model to focus on minimizing, mitigating, and managing project risk to deliver successful project outcomes.
2. Humanize the oversight process for state agencies while making it more consistent and predictable, and ensuring transparency and fiscal accountability.
3. Enable higher value oversight for larger, more complex, higher risk projects and lower agency project costs related to oversight and independent quality assurance for smaller, lower risk projects.
4. Reduce the time and simplify the process to register IT investments, especially for recurring maintenance and operations.

Business goals

5. Refine the investment planning process to improve the reliability of cost and schedule estimates.
6. Identify updates to relevant technology policies to reflect the improved oversight model and reduce the need for policy waivers.
7. Allocate state agency and OCIO resources to the highest value and for maximum efficiency.
8. Clarify roles and responsibilities for all oversight partners.



Guiding principles

1. Focus oversight on delivering the highest value and working in partnership with agencies to effectively manage, mitigate and minimize project risk to deliver successful project outcomes.
2. Emphasize trust, respect, and partnership in the oversight process.
3. Allocate resources for highest value and maximum efficiency.
4. Align our knowledge, skills and abilities with the size, complexity, and risk level of projects.
5. Apply best practices and lessons learned.
6. Maintain the professional independence of oversight.
7. Maintain transparency and be responsive and accountable to the authorizing environment.

Deliverables

1. Integrated oversight model.
2. Refined requirements for WaTech oversight and quality assurance.
3. Revisions to the investment registration, project risk assessment and oversight determination processes and associated tools.
4. Revisions to the investment planning process and associated tools.
5. Recommendations for the gated funding process.

Policies and standards

- Policy 121 IT Investments – Approval and Oversight
 - Policy 121 Procedures
 - Policy 121 Procedures Appendix F: Oversight Requirements
 - Policy 121 Procedures Appendix G: Reporting Requirements for Transparency Dashboard
 - Policy 121.10 Project Go-Live Readiness Decision Governance
 - Investment Plan and Investment Plan Amendment FAQ

- Policy 132 Project Quality Assurance
 - Standard 132.10 Minimum Qualifications for Project Quality Assurance
 - Standard 132.20 Minimum Project QA Activities – Readiness Assessment
 - Standard 132.30 Minimum Project Quality Assurance Activities
 - Guideline 132a Providing Quality Assurance for Information Technology Projects Appendix A: Principles of Quality Assurance

Questions or feedback?

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Public Comment

