

# Technology Services Board

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Portfolio/Policy Subcommittee Meeting  
January 12, 2023  
9:00 a.m. – 11:00 a.m.

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# TSB Members Meeting Attendance

## Industry Members

Butch Leonardson – Retired CIO

Paul Moulton – Retired CIO

Tanya Kumar – Oracle

## Legislative Members

Sen. Matt Boehnke – Senate 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

## Other Government

Viggo Forde – Snohomish County

### Vacancies:

Agency Director

House Representative

Labor Union Representative

Members present

Members absent

# Agenda

TOPIC	LEAD	PURPOSE	TIME
Welcome / Agenda Review	Bill Kehoe	Introduction	9:00
Review / Approve Minutes from Oct 13 Subcommittee Meeting	Bill Kehoe	Review/Approval	9:05
Review Subcommittee Purpose	Bill Kehoe	Information	9:10
Project Portfolio & 2023 Briefing Schedule	David Sorrell	Information/Discussion	9:20
Program Status – One Washington	Amy Pearson	Program Status/Discussion	9:30
Program Status – Long Term Services and Supports (aka WA Cares)	Richelle Glascock	Program Status/Discussion	9:55
Oversight Transformation Project Update	David Sorrell	Information	10:20
Policy Prioritization Update	Derek Puckett Samantha Zee	Information	10:30
Governor's Budget	Derek Puckett	Information	10:40
Public Comment			10:55

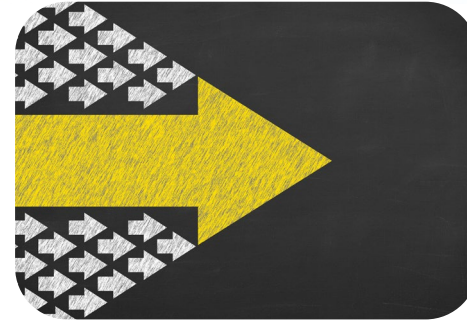
# Approve 10/13/22 Meeting Minutes

# Subcommittee Purpose Review

# TSB Portfolio and Policy Subcommittee - Purpose and Intent



Advise



Guide



Policies and Standards



Analyze and Consult

## Why are we here?

The subcommittee is established as an extension of the board and its core duties are as follows:

- Provide high level oversight and consulting of major IT projects.
- Review and approve technology-related policies and standards adopted by the CIO

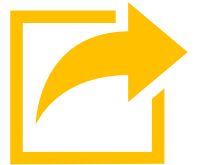
# Decisions and Recommendations Flow



Priority projects and program submissions to the subcommittee



Subcommittee review for consultation, recommendations, and guidance



Forward to full TSB for final review, adjustments, and approval



# Project Portfolio & 2023 Briefing Schedule

# Technology Services Board

## *Oversight of projects*

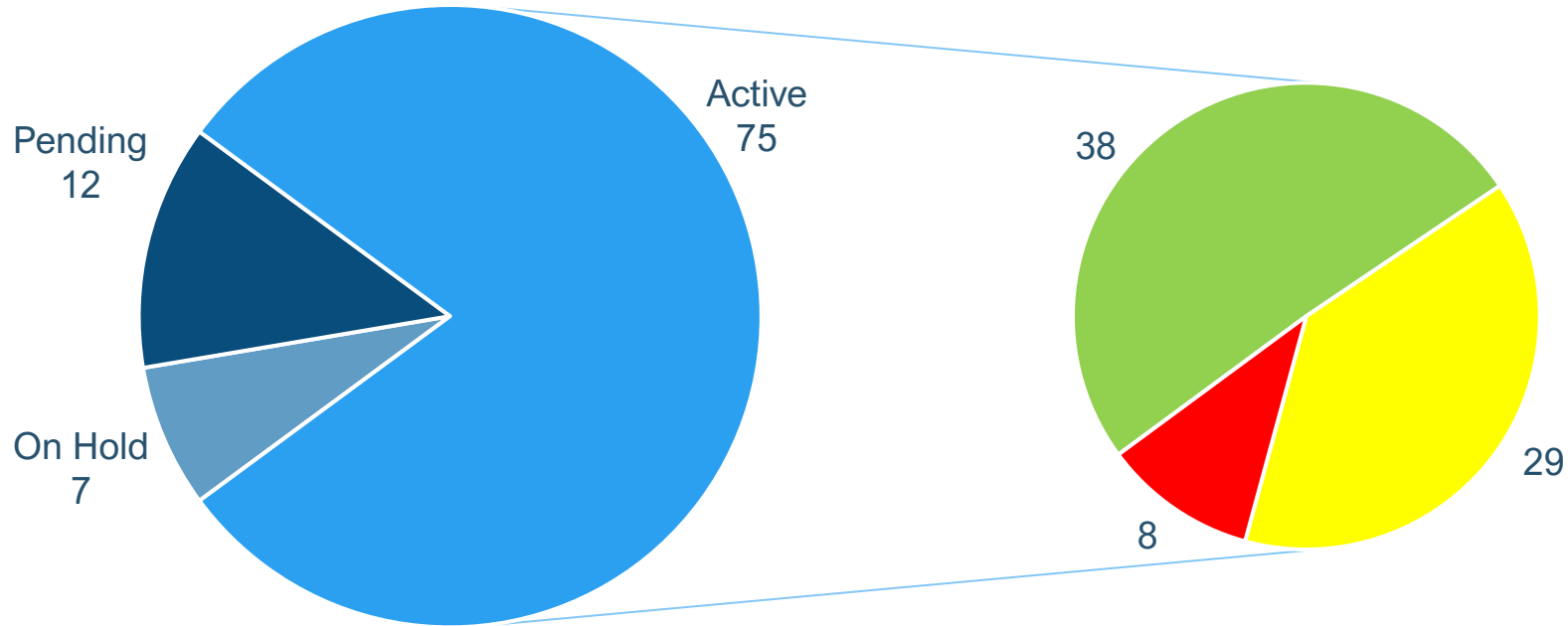
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*IT Project Oversight helps state agency technology projects align with business goals and priorities, achieve success, and deliver planned outcomes*

- ✓ Engage as partners
- ✓ Advise project leadership
- ✓ Provide transparency to the public and authorizing environment

# Technology Services Board

## *A look at projects currently under oversight*



\$1.69B total planned spend

15 projects > \$20M

15 projects > 5 years

### Washington State Information Technology (IT) Project Dashboard

# Technology Services Board

## Briefing Schedule for 2023

Program/Project		Current OCIO Assessment	Jan (S)	Mar (F)	Apr (S)	Jun (F)	Jul (S)	Sep (F)	Oct (S)	Dec (F)
One Washington	OFM	●								
Workers' Compensation Systems Modernization	LNI	●								
CORE: Pension Administration Modernization	DRS	●								
Long Term Services and Supports (aka WA Cares)	DSHS, ESD, HCA	●								
Electronic Health Records as a Service	HCA	●								
Healthcare Enforcement and Licensing Modernization (HELMS)	DOH	●								
Integrated Eligibility and Enrollment	DSHS (HHS Coalition)	●								
DCYF: Social Services Payment System Replacement & Comprehensive Child Welfare Information System Replacement	DCYF	● ●								
LCB Systems Modernization Project (SMP)	LCB	●								
988-1477 Program	HCA, DOH	●								
UW Financial Transformation	UW	●								

Other projects, briefing schedule is TBD:

- System for Integrated Leave, Attendance, and Scheduling (SILAS), DSHS
- Correctional Industries ERP Implementation, DOC
- WorkSource System Replacement, ESD

(F) Full Board

(S) Portfolio/Policy Subcommittee

### Which projects?

Major IT projects under WaTech oversight

Complex, high risk & high visibility programs and projects

Significant spend

- Multi-year duration
- Multiple programs or agencies
- Legacy modernization and remediation
- Mandates with limited schedule flexibility
- Significant impact on business

### When to engage TSB?

- At initiation and major milestones (proactive)
- When seeking guidance on a specific topic (proactive)
- When experiencing significant challenges (reactive)
- At end of project as a close-out, celebration and lessons learned (retrospective)

# One Washington Program



**One Washington**  
A Business Transformation Program

# Program Priorities for December and January

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Program priorities are driven by the schedule and updated every two months, with leadership input and evaluation.

1. **Program Staffing**
  - Recruitments, contracted roles, and interagency agreements
2. **Contractual Work**
  - Amendments, statement of work updates, and deliverables
3. **Schedule Development**
  - Phase 1a and Integrated Program Schedule
4. **Technical Budget**
  - Gate 6 Certification
  - Gate 7 Application
5. **Planning and preparing for 'State of the Program' to share information broadly with agencies**
  - Occurring January 25
6. **Enterprise Integration Crosswalk**
7. **Integration Designs**
  - Upcoming milestone end of January
8. **Information Sessions Round 2**
9. **Develop Implementation Plan for Agency Engagement with Design**
10. **Respond to questions regarding Governor's proposed budget and Legislative session**

# Program Priorities – Top 3

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## Priority 1: Staffing

- Reason: Fill vacancies with highly skilled and experienced team members
- Risk: Without proper staffing, there will be insufficient resources to complete the work
- How Addressing: Updated position descriptions with required skills and experience, and appropriate compensation; leveraging contractors to augment state staff for hard to fill or unique rolls

## Priority 2: Leverage industry partners through contractual engagements

- Reason: Ensure business and technical needs are available to advance the program
- Risk: Without updated and accurate contract language and deliverables, we would be working outside the contract or not able to leverage industry expertise
- How Addressing: Prioritizing time with business, technical teams, contracts, vendor management, and our partners to document, review, and approve contract amendment language

## Priority 3: Phase 1A Schedule Development and Baseline

- Reason: Have approved schedule for the program, and agencies to use and manage against
- Risk: Without a baselined schedule the integrity of the program erodes, and does not adhere to project management best practices
- How Addressing: Leveraging input from program team members, WaTech OCIO, and Quality Assurance to develop the most accurate schedule possible based upon known information and documented assumptions

# Upcoming Work: Schedule highlights of the next 90 Days

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## 1. Providing agencies with business processes and design information

- A series of Information Sessions (Round 2) will be held February 22 – March 30
- These sessions will be open to all agencies, recorded, and made available through The Learning Center
- They provide an opportunity to educate, share information, answer questions, and ask for feedback on the proposed to-be business process flows and other elements of the Workday design.
- After the sessions, to-be business process documents will be shared and made available on the AST SharePoint site.
- This information will be used by agencies in their system remediation work and in redesigning their financial management processes to take advantage of the new Workday process flows.
- Agencies will have the opportunity to provide feedback—assisting in validating the design and reducing the risk of a flawed or incomplete design.

## 2. Integration designs complete

- Design work to be completed by end of January
- Provides the foundation for the development and testing of the needed integrations
- Feedback following the information sessions may require some changes to integration designs

## 3. Complete analysis of Legacy System Remediation Pass 2 data

- Completion of the catalog of system processes and remediation information needs by mid-February
- Will help confirm design and other information needed for legacy system remediation, and may enable a more strategic sequencing of project tasks that can reduce schedule risks



## Questions & Closing

## Long Term Services and Supports (WA Cares)

# WA Cares Fund Overview

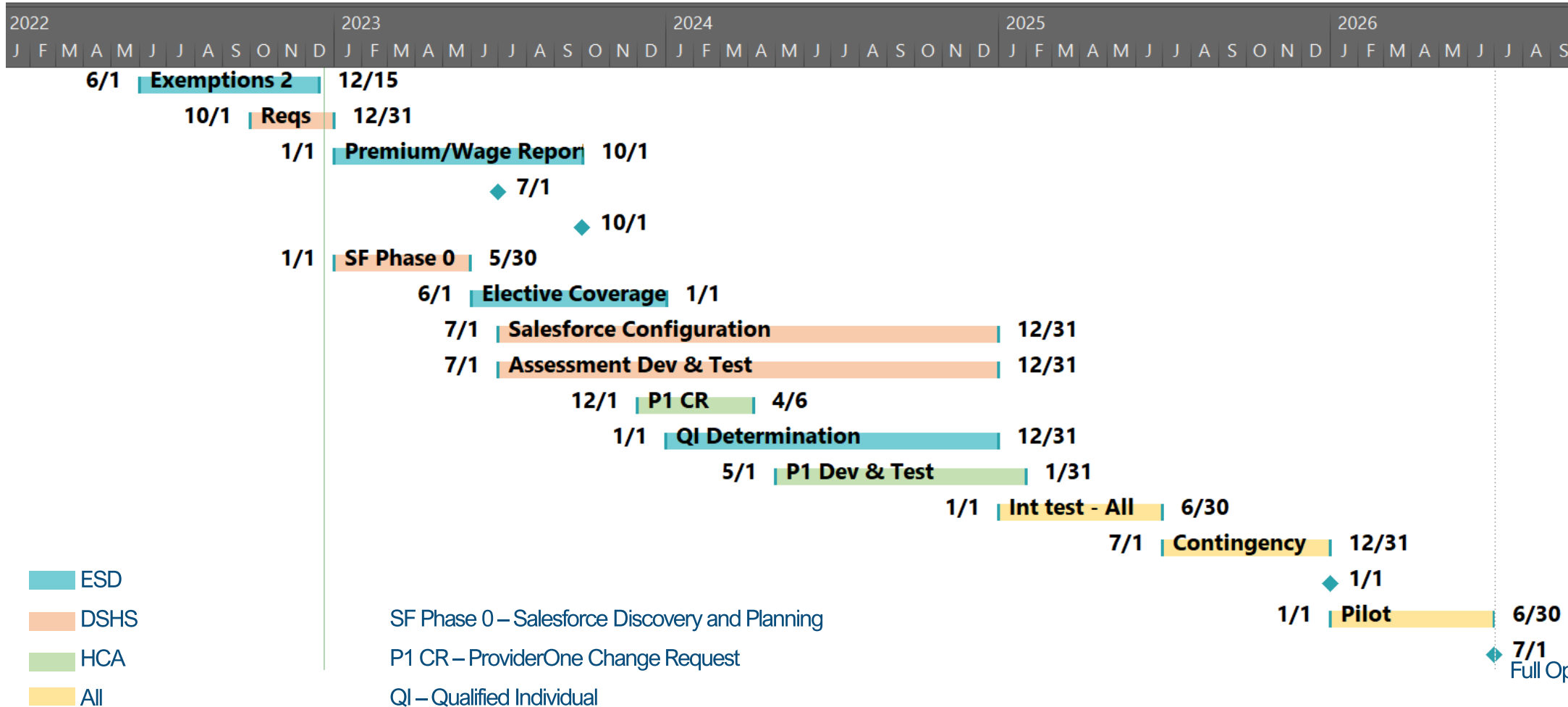
HB 1087 passed 2019, revisions 2021

- Universal long-term care program
- An earned benefit
- Self-funded from worker contributions
- Affordable contributions across our careers
- Lifetime maximum benefit of \$36,500
- Contributions begin July 2023; Benefits begin July 2026

RCW Directs roles of Agencies

- DSHS – Lead agency and responsible for assessing applicants, public customer service
- ESD – Responsible for exemptions, premium collection, contribution determination, employer and exemption customer service
- HCA – Responsible for Provider payments (ProviderOne), provider customer service

# Schedule Overview



- ESD
- DSHS
- HCA
- All

SF Phase 0 – Salesforce Discovery and Planning  
 P1 CR – ProviderOne Change Request  
 QI – Qualified Individual

\*If pilot is approved by legislature.

# ESD: Exemptions, Elective Coverage, Premium and Wage Reporting Releases

## Exemptions

- Released Dec. 15, 2022

## Electing coverage

- By July 1, 2023

## Premiums and wage reporting

- By Oct. 1, 2023

## Premiums and reporting (elective coverage)

- By Jan. 1, 2024

# DSHS Systems Planning

In planning for the DSHS system needs for WCF, DSHS conducted a build vs. buy analysis. The process consisted of the following:

1. Requirements gathering
2. Establish a prioritized criteria list
3. Evaluate options for each system need
4. Recommend best option

DSHS leadership selected the following options for WCF Technology

- Benefit Application and Management System (BAMS) - Salesforce
- Customer Relationship Management System (CRM) – Salesforce
- Assessment System – GetCare by RTZ Systems
- API Gateway – Mulesoft (HHS Coalition instance)

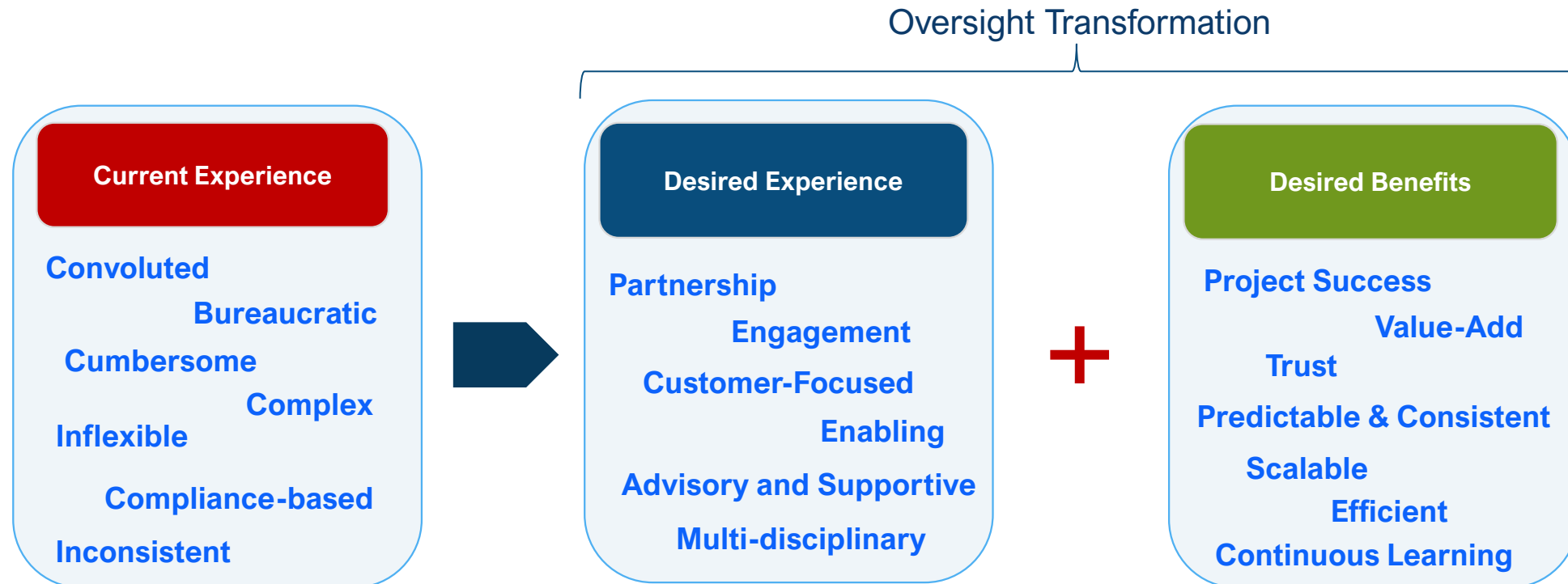
# Top Program Risks

- **Potential Scope Changes** – as WA Cares Fund is revised in upcoming legislative sessions, some of these revisions will introduce scope change.
  - Management plan – include contingency time in the capacity and schedule to account for potential changes
- **Labor Market** – There is a high demand and low supply of qualified IT personnel. If the projects are unable to hire or contract for qualified personnel, schedule may be impacted.
  - Management plan – Identify needed resources and recruit early. If appropriate resources cannot be hired, identify other options for contracting or shared resources.
- **Go live risk** – Demand at go live is expected to be 4x higher than ongoing demand.
  - The agencies are working with the Long-Term Service and Supports Trust Commission to request authority to pilot prior to the date defined in statute. Awaiting action from the legislature.

# Oversight Transformation Project Update



# Oversight Transformation Vision

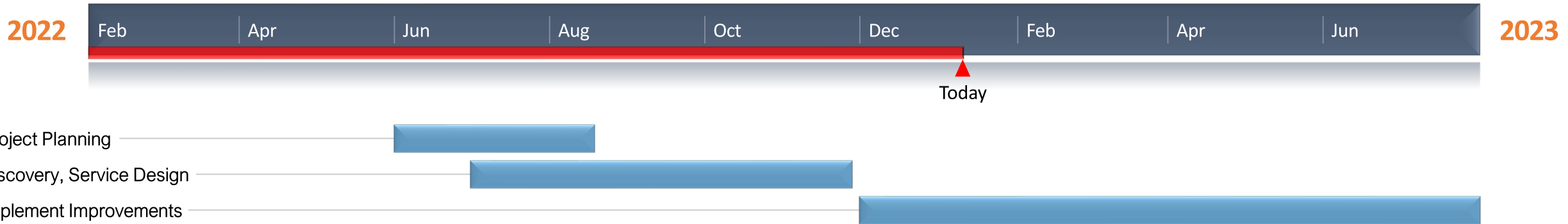


The Technology Services Board has statutory responsibility for approval and oversight of IT projects ([RCW 43.105.285](#)) and delegated that authority to the OCIO. The OCIO approves, monitors, and evaluates major state agency IT projects and serves a key role in ensuring these projects align with business goals and priorities, achieve success in meeting business outcomes, and are completed within approved scope, schedule, and budget.

The Oversight Transformation Project will improve the oversight model, operations, and processes to more effectively serve agency customers and key stakeholders.

# Oversight Transformation Timeline

*This project builds upon the work conducted by Plante Moran in 2019...*



### Milestones:

- Steering committee selected March 2022
- Project chartered June 2022
- Project plan approved July 2022
- Vendor onboarded August 2022
- Town hall November 2022
- Discovery and high-level service design completed December 2022
- *Detailed future state process development underway*

# Oversight Transformation

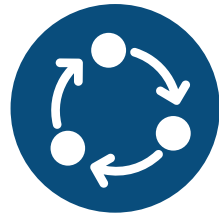
## Improvement Focus Areas

### Our “North Star” Focus Areas for Future Improvements



#### Customer-Focused, Scaled Oversight

Delivers a customer-centric approach that meets our oversight mandate but tailors its methods to drive the needs of the business



#### Efficient Processes

Utilizes more effective tools and workflow to drive efficiency, reduce duplicative work, and creates time for OCs to deliver additional high value services



#### Role Clarity

Promotes accountability, and reduces overlapping responsibilities by ensuring roles within and across teams are understood and agreed

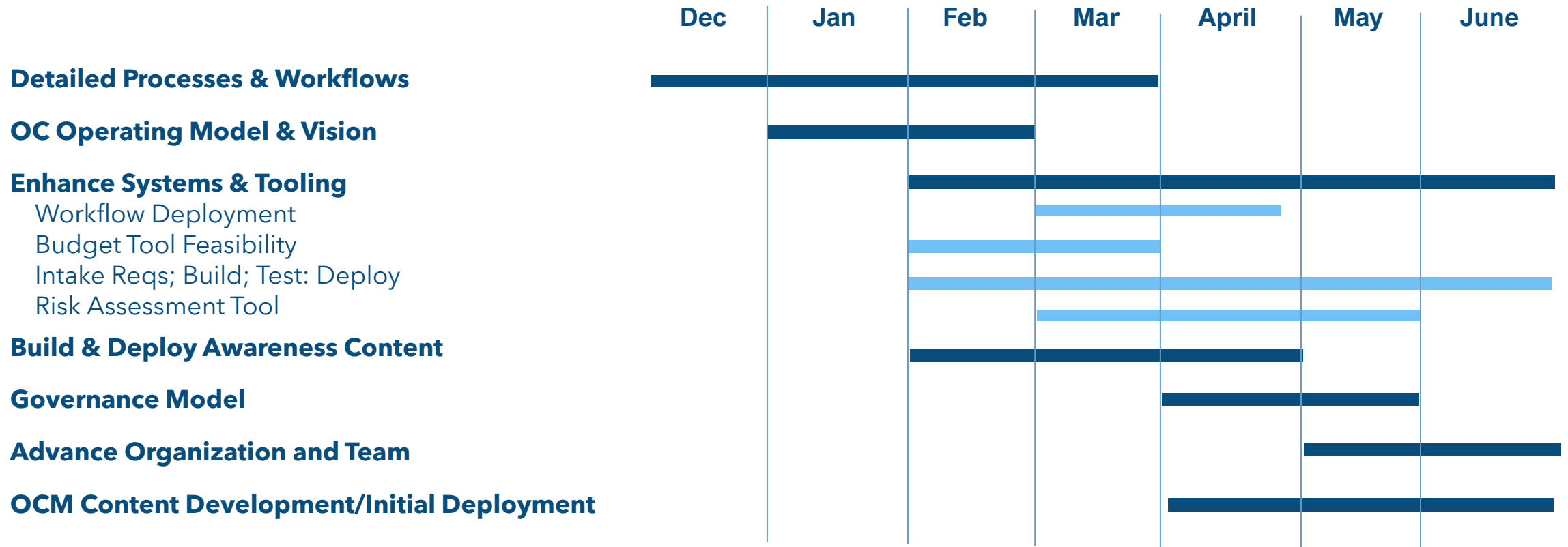


#### Value Added Service

Provides opportunity for OC to advise and consult, facilitating greater agency-wide execution capability, leading to more successful project outcomes

# Oversight Transformation

## Next Steps



# Contacts

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Any questions, please reach out to any of the project contacts.

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[Oversight Transformation Website](#)

# Policy Prioritization Update

## Policy Prioritization Strategy

- There are many policies that need to be reviewed that are past their sunset review date.
- Policy owners need to understand how their policies interact and connect with other policies.
- Prioritizing them as a group leads to valuable discussion.
- An overall schedule to update policies based on results will be created & communicated.
- Each policy owner will lead a community workgroup with the policy manager to update their policies.

WaTech policy owners are evaluating **all** policies against three categories previously weighted by WaTech's executive team:

- Risk: Operational, Financial, Digital Security 59.37%
- Positive Impact: Improvement offered 30.71%
- Complexity: Written, Discussion 9.92%

Responses are due **1/25** for discussion and finalization for scheduling.

We anticipate a full schedule will be available by the next TSB Portfolio/Policy subcommittee meeting on April 14.



# Governor's Budget

# WaTech Decision Packages

## Innovation and Legacy Modernization

- DP submitted for dedicated funding to address agency needs

## Service Expansion

- Strengthening WaTech services to meet customer demand

## Connected Government

- Several DPs were submitted to promote connected government

# Statewide Decision Packages - Themes



Majority of DPs improve existing service (32%)



Closely followed by continuing existing project (31%)



Roughly 20% propose system modernizations

# Decision Package Funding Recommendations

WaTech reviewed 140 DPs and made recommendations

Approximately 60% of recommendations were adhered to

WaTech will continue to evaluate recommendations throughout the budget process

# Public Comment