

Technology Services Board

Portfolio/Policy Subcommittee Meeting

May 12, 2022

10:00 a.m. – 12:00 p.m.

Remote via Zoom

In Attendance

Bill Kehoe, Chair
Viggo Forde
Tracy Guerin
Butch Leonardson
Paul Moulton
Sen. Joe Nguyen
Vikki Smith

[Presentation Slides](#)

[Meeting Video](#)

Welcome/Agenda Review – Bill Kehoe

Bill welcomed everyone and reviewed the agenda.

Approve Minutes from April 14 Subcommittee Meeting – Bill Kehoe

Bill reviewed the minutes from the April meeting. Minutes were approved as written.

Program Status – Health and Human Services (HHS) Coalition

David Sorrell, oversight consultant, shared that the HHS coalition is a partnership of leaders of Washington's health and human services agencies. In addition to oversight, WaTech leadership, including Bill Kehoe, Deanna Brocker and Nick Stowe, are engaged on various coalition committees, serving as advisors with focus on program and project success.

David introduced Sue Birch, Health Care Authority (HCA) director and chair of the coalition's executive sponsor committee, who led an overview and background of the coalition. The presenters also touched on two of the coalition's enterprise-wide initiatives: integrated eligibility enrollment program and the master person index project.

The program team provided an overall orientation to the collaboration and will return for future discussion with the TSB members on these initiatives and strategic work.

Sue mentioned this program is being recognized nationally as a best practice. The collaborative practices provide strategic direction, cross organizational IT project support and federal funding guidance across Washington's health and human service organizations.

Nearly three million Washingtonians are assisted in reaching their full potential through over 75 health and human service programs, supporting foundational health and wellbeing.

Sue reviewed a more updated program vision such as removing technological barriers to accessing benefits programs, making best use of public investment in IT systems, effective emergency system communications, interoperability to support health system response, seamless and rapid application process for eligibility status, single system for personal information changes, and equitable system design decisions.

Les Becker, deputy secretary for innovation and technology at the Dept. of Health, reviewed the seven enabling strategies to help execute on the vision that Sue outlined, and the importance of joint governance. He also reviewed the coalition portfolio process.

Q: Butch Leonardson - Is it safe to assume that each project will have its own executive and project manager?

A: Les Becker - Yes, we do have an executive. Sometimes it's multiple when we have multiple agencies involved, and we do have project managers and then program managers that support the entire effort.

Comment: Butch – Coalition can be concerning with a lot of involvement and no one's in charge. Please be careful breaking things down into projects under the umbrella of a program. Make sure those projects have a real leader, a real executive and a real project manager.

Q: Vikki Smith - How do decisions that are controversial get escalated up and decisions made, especially if they cross over agency lines?

A: Les – The coalition governance structure has three work groups, um, quote, then just based on levels. And we expect that most of the technical work happens at the lower levels with the real technical teams focusing on finding the solutions to those. Um, if they cannot find solutions that everyone can agree on, then it's brought up to the executive sponsor committee for the coalition, all five, uh, of the agencies being represented representative. And we will discuss the technical elements, get briefed on the, you know, the issues where the disagreement is and ultimately that group will make the final decisions about how things move forward.

Cathie Ott, IT strategic advisor at HCA, provided a brief overview of the coalition's master person index (MPI) project. It's one of the enterprise-wide projects. HCA is the steward of that project. Ross Hunter from Dept. of Children, Youth and Families (DCYF) is the project executive sponsor. Cathie is the project director. It's an identity matching solution that can be used in systems across the coalition, to improve client experience and increase data quality, consistency and accuracy. Discussion included lessons learned and governance.

Bill pointed out to the members the importance of enterprise architecture and adhering to architectural principles and the principle of commonality with these programs with multi-agency projects.

Rich Pannkuk, deputy assistant secretary, finance, facilities and analytics administration within Dept. of Social and Health Services (DSHS), and project director for the integrated eligibility enrollment (IE&E) project, provided a brief overview of the project. Pam McEwen with the Health Benefit Exchange serves as the project executive sponsor. The goal is to create more equitable access to all health and human service programs by streamlining access to benefits. An applicant should be able to tell their story one time and determine eligibility for each of the health and human service programs.

Q: Paul Moulton - When you move from a mainframe to a cloud-based platform, one of the more complex and difficult things to do is change your security. How is that being handled?

A: Tracy Guerin – She shared that when DRS went from mainframe into the cloud, they worked with the security design review team to figure out just exactly how to do that, and assumes this would also be the case for this project.

Bill confirmed that this project would go through WaTech's security design review process working closely with the security officers in all of the agencies that are represented in the coalition. Board members should keep eyes on this when the project comes to future meetings.

Dan Renfro, HHS coalition governance manager, shared some of the challenges the level of collaboration has to overcome such as culture, communications, shared asset ownership and recruitment and retention.

Bill expressed to members the need to assist these projects and programs to ensure they have the right structure, resources and architectural principles. The state can benefit from this program's experience and lessons learned moving forward.

Q: Viggo – He would like to hear more on formal change management practices in future updates.

A: Dan – Happy to share about that in the future.

Program Status – One Washington

Amy Pearson, One Washington oversight consultant, provided an introduction to Christie Fredrickson, the program's executive sponsor, and her team who focused the presentation on the program's deployment approach and strategy to implement core financials. The team addressed TSB members' concern about the big bang approach to replacing the Agency Financial Reporting System (AFRS) and deploying to all 36 agencies impacted simultaneously.

Christy shared that as a result of not receiving supplemental funds for fiscal year 2022, the majority of the vacant positions are going to continue to remain vacant, and will have impacts because they cannot do more or even the same work with less. They are also continuing to make good progress with negotiations with Deloitte.

Q: Butch – With Deloitte, was there one significant overarching issue that you've been working on or is it a plethora of issues?

A: Cristie - A number of factors that culminate around having high quality.

Q: Paul – Is your comment on quality a result of your vendors not providing their “A” team implementers or is there something else that's causing the quality problem?

A: Christie – Prior to her arrival, Deloitte did provide modification in some of the leadership roles on the project. Since her arrival, she’s been pleased with the interactions.

Bill requested leadership from Deloitte and Workday to address stability of resources.

Paige Bayliss, Deloitte program director on One Washington, confirmed her confidence in the resources assigned to the program.

Q: Butch - If Deloitte assigns a staff person to One Washington, and they're a typical systems integrator employee, but they have no knowledge in Workday, what do you do?

A: Paige - We would not assign someone to the program that doesn't know Workday, if it's a role that requires Workday configuration or development expertise.

Q: Butch - Somewhere along the line, people who know Workday didn't know Workday. In those cases, in the past, is there a training relationship with Workday or is it more on the job training?

A: Paige - In the Workday ecosystem, there is a very strict requirement around certification. Workday requires a certain level of certification with the product before you're enabled to interact with the tenant.

A: Steve O'Donnell, managing partner with Workday, we will not systematically allow access to our tenants unless they're certified on the product.

Q: Paul - Need to understand Deloitte’s answer to previous question - Was there a lack of quality of people on the team and if your answer was right now you feel very comfortable, is that something that's only occurred in the last few months? If you've always been comfortable and the team was always good, then what exactly caused the problem if it wasn't the knowledge of the implementers?

A: Paige – With the very large program, there may have been fit issues with a resource or two, but would not characterize that as quality issues related to resources on the program. This very complex, large statewide deployment involves a lot of learning on this program and some of those issues have taken longer to resolve and design considerations that are still being worked through. But I would not quantify that as a resource quality problem.

Q: Butch - Well, I'm confused, as you said there was a quality problem at one time and if it wasn't a people quality problem, then what was the quality problem?

A: Paige - Again, I would say that the complexity of this program and the nature of it being a first of its kind and fitting the state's requirements into a SaaS solution is a challenge. Not a quality issue. It is a complexity issue that is taking time to work through and to develop the competency of the state's needs and requirements on the vendor side and of the product’s capabilities and features on the state side.

Q: Paul - I heard you say was that Workday and Deloitte, neither of you have implemented something this large or complex before. Wondering if that was something that was fully disclosed when you were first obtaining these contracts was that we're not, we've never done anything this

big before this complex before, so we're going to be learning right along with you - the reason Deloitte et cetera were being brought in were the expertise in this particular area. Today I'm hearing you say we did not have the expertise because we have never done this before. Did I mishear that?

A: Paige - Did not intend to say that Deloitte has not done large complex implementations of Workday. We certainly have. We're one of the largest, most experienced partners in the Workday ecosystem. My comments were to indicate that this deployment is the first time Workday financials is being implemented at the scale statewide. That information was very much transparent throughout the procurement and selection process. And it's something that we talk very frequently with the state team about even today. As we think about the way forward, as we think about what options there are for the state's decisions that need to be made, that there is not a large contingency of other states that have gone before that you can draw from, with this specific experience. Does that help?

A: Steve – The state of Washington program, along with the state of Iowa are both charting new territory with this scope in this focus at the state level.

Comment: Vikki - I think you can tell from the questions both Paul and Butch are asking is a concern that you are true partners with OFM on this project and that there is accountability from both sides and making sure that there's resources that we need to have, especially since they didn't get the funding next fiscal year. That we continue to make progress in terms of One Washington being able to meet milestones that have been set.

Paige: We're a hundred percent committed.

Steve: Echo Paige's point and nothing's more important than to make sure that the state is successful.

Comment: Butch - Down the road, the TSB may find that we were getting very sanitized information, and that often projects become very, very difficult, not because of the software, but because there are not great teams. It's just not great teamwork. Not sure if that's the case, but let's all be on the alert for whether we've got a really good collective team going here.

Comment: Bill – appreciated the transparent discussions and Deloitte and Workday's participation, expertise and leadership with this scale of work.

Scott Nicholson, executive director of business transformation, provided an overview of the deployment approach/strategy, The Way Forward plan, established as a reassessment of the scope and program goals that will ultimately lead to a schedule and a new go live date. The outcome of the way forward work will inform first implementation financials, as well as decision package for the 23-25 biennial budget.

John Anderson, executive director of technology transformation, provided an overview of the timing and methods by which they deploy Workday focused on the first financial implementation.

Christie reviewed key criteria in assessing the benefits, risks and other considerations in the deployment approach.

Comment: Paul - I understand the different elements that you are considering and weighing. I don't understand how you reach a conclusion. I would identify the risk as people, people, people,

and then everything else. And I wouldn't worry about the technology at all. Organizational change management is probably the largest risk. If we do it every place at once, do we have an organizational change management structure that would permit us to deal with all of the issues that will come up at all of the agencies at exactly the same moment, as opposed to, it'll take a longer period of time? The biggest impact of going one way versus the other is going to be time. It will take a lot longer to do a waved approach than it will to do a big bang approach. And so if that's a consideration, I consider that an error.

Comment: Butch - Paul's spot on. Nine times out of 10, when big projects like this fail its organizational readiness failed. It wasn't the software. It wasn't the attitude or the quality people, just organization wasn't ready to flip the switch. And the beauty of a waved approach is second, third, fourth waves get better. Confidence grows. Things just get better.

Q: Viggo - I agree with those statements. I think one thing that might help articulate the level of risk by the different approaches here would be to map the risks against these approaches. Maybe you've done that, but it wasn't necessarily all that visible. If you build a two to three dimensional metrics that maps those risks against these examples, you might be able to have some insight around which approach will give you the highest or the lowest risk for which risk factor. So that might be one layer that could be helpful in understanding. I think we have general agreement and feeling about waving feeling safer for a lot of good reasons. And at the same time analytically, I think that the project team should be able to map these risks against these different approaches and come back and say, here's what we think the pros and cons are in these of these areas

A: John - That's what we're doing internally from a program perspective.

Q: Viggo - So what I'm hearing then is that you, you don't have that view complete yet, and that's for the future?

A: John - We have taken input from our advisory team, subject matter experts, finance people from around the state and developed the categorizations.

Comment: Butch - Just my opinion – over-baking this whole thing. So many people giving their input.

Response: John – This approach is based on guidance to be more thorough and inclusive in our assessment.

Response: Christie – Echoed John's comments to be inclusive of the enterprise.

Response: Vikki - as an agency director, appreciates that and supports the outreach. .

Q: Paul – Have you had an opportunity to reach out to any of the larger implementations like Walmart, etc. to ask how they went about it, and if they had a chance to do it over again, how would they do it differently?

A: Christie – it's on the list to do – UW, Iowa.

Comment: Paul - An opinion of someone who's done this before, on this scale is worth a lot. The key question is how did you do it? And if you had it to do again, how would you do it differently? What would you recommend as the best way to do it?

Response: Amy - we are actively engaged with the UW finance transformation, the Deloitte Workday implementation. She and Bill with the UW team to discuss how to lean in better as an agency to support them, but also to bridge that collaboration between UW and One Washington.

Bill thanked everyone for the great discussions.

IT Project Oversight Transformation Project Update

Bill introduced Nicole Simpkinson, assistant director in the strategy and management division. This was Nicole's next to last day working with the state. She provided an update to an ongoing effort to improve the IT project oversight model. She reviewed the vision, business goals, guiding principles, deliverables and policies/standards that currently govern oversight.

Comment: Viggo - I like the structure. I like the approach and I intend to leverage the work of this group in my world (Snohomish County).

Comment: Bill reiterated the importance of partnering with agencies to refine the oversight process to ensure successful projects within the state.

Public Comment

No public comments.