

# Technology Services Board Quarterly Meeting

December 10, 2019

9:00 a.m. - Noon



WA • Office of the

**Chief Information Officer**

# AGENDA

TOPIC	LEAD	PURPOSE	TIME
<b>Welcome, Introductions, Opening Remarks</b> <ul style="list-style-type: none"> <li>• Senator Ann Rivers, Legislative Member</li> <li>• Viggo Forde, Snohomish County, Local Government Member</li> </ul>	Jim Weaver	Intros	9:00
<b>Approve Minutes from September 12 Meeting</b>	Jim Weaver	Approval	9:09
<b>Project Status – Office of Financial Management’s One Washington Program</b> <ul style="list-style-type: none"> <li>○ Pat Lashway, Executive Sponsor</li> <li>○ Vann Smiley, Program Executive Director</li> <li>○ Allen Mills, QA, bluecrane™</li> </ul>	Sue Langen Pamela Davis-Taggart	Discussion / Feedback	9:10
<b>Policy/Standard Review</b> <ul style="list-style-type: none"> <li>• Policy 111 - Planning for IT Portfolios (<b>RESCIND and combine with Policy 112</b>)</li> <li>• Policy 112, 112.10, 112.20 - Portfolio Management (<b>UPDATE</b>)</li> <li>• Policy 113, 113.10, 113.30 and 113.40 - Technology Business Management (<b>NO CHANGE, new sunset review date</b>)</li> <li>• 161.01 – Geodetic Control Data Standard – <b>Update</b></li> <li>• 161.02 – Geospatial Metadata Standard - <b>Rescind</b></li> <li>• 161.03 – Hydrography Data Standard – <b>Update</b></li> <li>• 161.05 – Geospatial Application &amp; Data Services Metadata Standard - <b>Rescind</b></li> <li>• 187.10 – Metadata Standard – <b>Update</b></li> <li>• Policy 188 - Accessibility (<b>UPDATE</b>)</li> <li>• 188.10 – Minimum Accessibility Standard (<b>UPDATE</b>)</li> </ul>	Sue Langen Joanne Markert	Review/Feedback/Approval	9:55
<b>Break</b>			10:20
<b>IT Strategic Plan</b>	Jim Weaver Sue Langen Derek Puckett		10:30
<b>Public Comment</b>			11:30

# Welcome New Board Members



Ann Rivers  
Senate Republican



Viggo Forde  
CIO, Snohomish County

12/10/19

# Current TSB Members

## Industry Members

Butch Leonardson – Retired CIO (via WebEx)  
Paul Moulton – Costco (via WebEx)

## Legislative Members

Rep. Matt Boehnke – House R (via WebEx)  
Rep. Zack Hudgins - House D  
Sen. Patty Kuderer – Senate D  
Sen. Ann Rivers – Senate R (via WebEx)

## Executive Branch (Agency Directors)

Jim Weaver – State CIO & Chair  
David Danner – UTC  
Tracy Guerin – DRS  
Vikki Smith – DOR

## Other Government

Viggo Forde – Snohomish County (via WebEx)

Members present  
Members absent

12/10/19

# Project Update – OneWA

---

12/10/19

5



December 10, 2019

# PROGRAM UPDATE

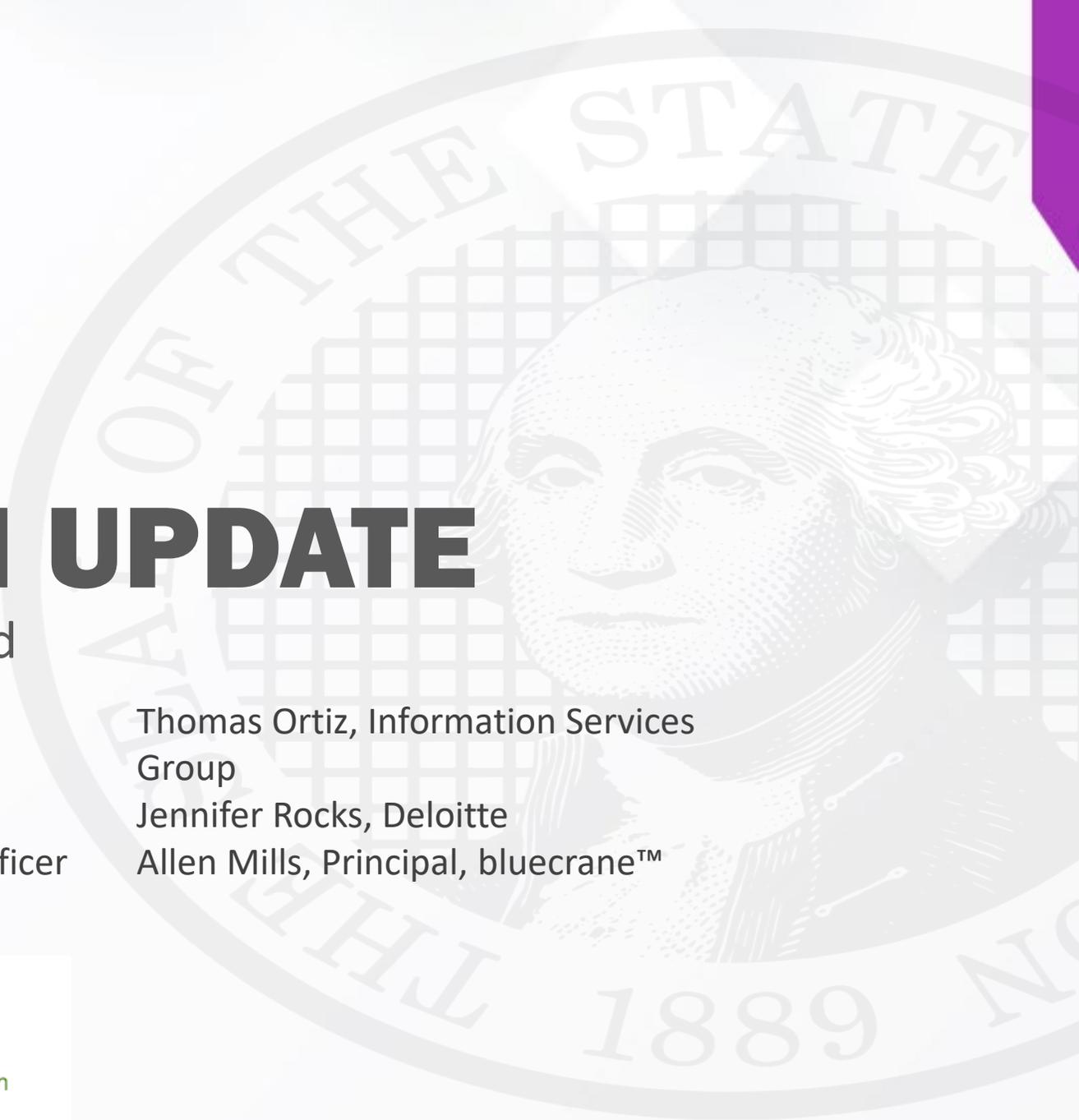
## Technology Services Board

Pat Lashway, OFM Deputy Director  
 Vann Smiley, OneWa Executive Director  
 Elizabeth Drown, OneWa PMO Manager  
 Ann Bruner, OneWa Chief Technology Officer

Thomas Ortiz, Information Services Group  
 Jennifer Rocks, Deloitte  
 Allen Mills, Principal, bluecrane™



**One Washington**  
 A Business Transformation Program



# Governor's Executive Order

Executive Order 19-04, One Washington: Modernization of State Administrative Business and Systems was signed by Governor Inslee on October 30, 2019!

- **Executive Order 19-04:**
  - Provides the vision to executive branch agencies
  - Reinforces the major transformation that will be required for agency staff and processes
  - Describes the expectations for systems modernization





# QA REPORT

Allen Mills, bluecrane™



## QA Update since Oct. 10 TSB Policy Subcommittee Meeting – 1 of 2

- As noted at the October TSB Policy Subcommittee meeting, industry partner firms were on-boarded in September
  - ✓ Input from Industry Partners resulted in a restructuring of the delivery of scope over the Program timeline
  - ✓ Risks of not having time to utilize ERP modernization best practices have been reduced (e.g., Chart of Accounts development now included in delivery of finance transformation effort)
  - ✓ Validation of resources to achieve the restructured scope within the planned timeline is ongoing
- Organizational Change Management (OCM) and Communications efforts to coordinate work with agencies have improved; results pending
- “Agency Readiness” in terms of staff, systems, and data has been better defined and efforts to address agency readiness are underway

## QA Update since Oct. 10 TSB Policy Subcommittee Meeting – 2 of 2

- Investment Plan, Technology Budget, and Decision Package
  - ✓ With input from Industry Partners, work products are much improved over prior year's product
  - ✓ “Tells the story”
  - ✓ Answers questions and notes where work is on-going to derive more details

## QA Perspective on Evolving Risks

- Risks are changing and the program's management of risks is evolving
  - ✓ Arrival of Industry Partners has not eliminated risks!
  - ✓ Rather, more detailed information – based on ERP implementation experience – is better defining the risks and what is required to mitigate risks
- Risks are evolving – past risks related more to (some fairly significant) “unknowns”; risks are quickly shifting to structured management and collaboration around details that are swiftly emerging
  - ✓ Example: Scope
  - ✓ Example: Schedule content (“timeline”) and schedule management

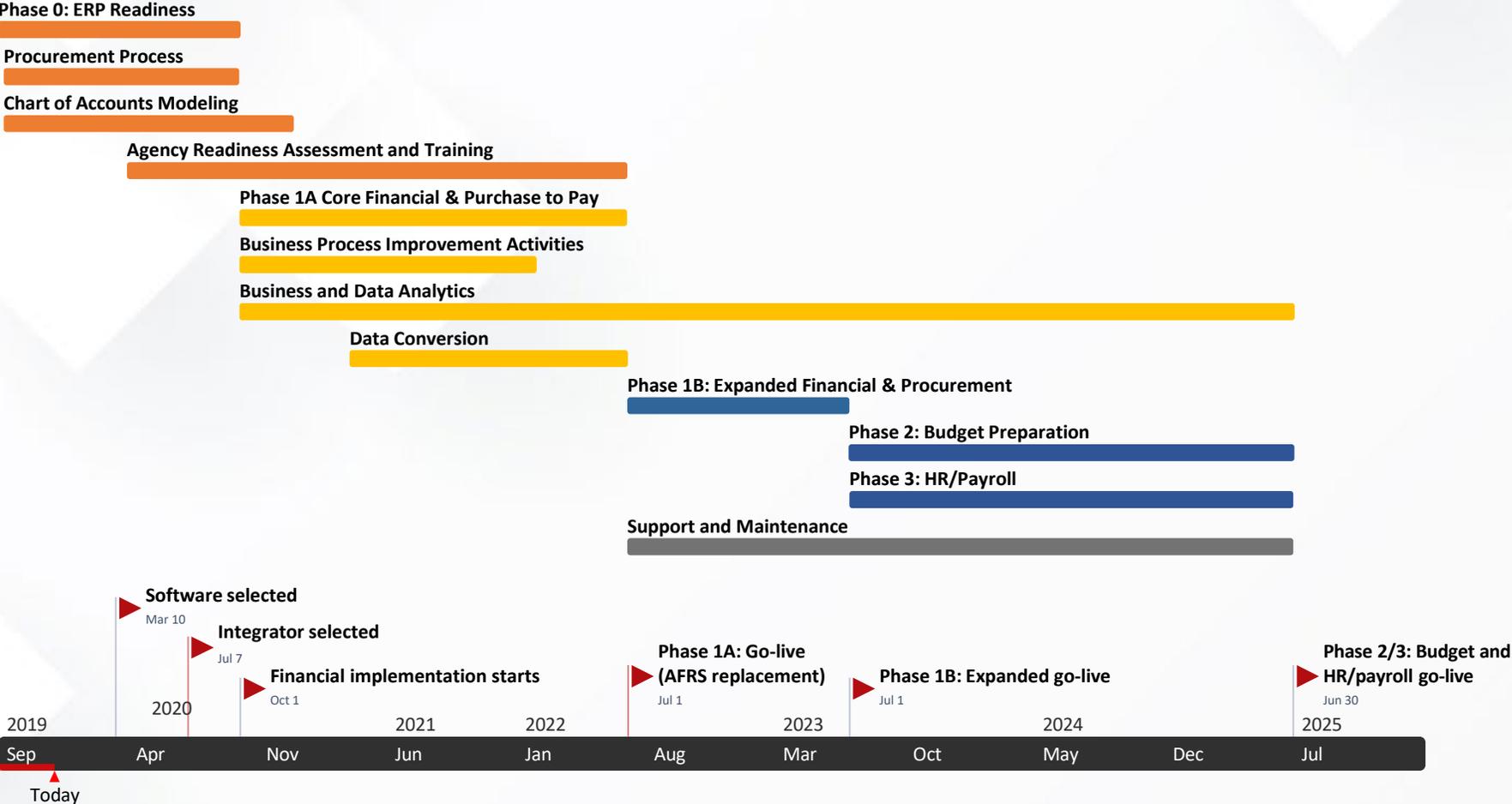
## QA Perspective – Looking Forward

- Agency Readiness remains a risk for now, although not as elevated as before
  - ✓ Cannot afford to wait for “perfect” information
  - ✓ Suggestion for partial mitigation: develop an approach to addressing Agency Awareness that transparently:
    - Acknowledges areas of uncertainty
    - Sets “gated” timelines for keeping agencies aware of what is known
    - Communicates Program’s planned approach for getting information
- Anticipate more evolution of the details of the Program
- Anticipate increased emphasis on vendor management to include coordination and collaboration *across* vendor activities

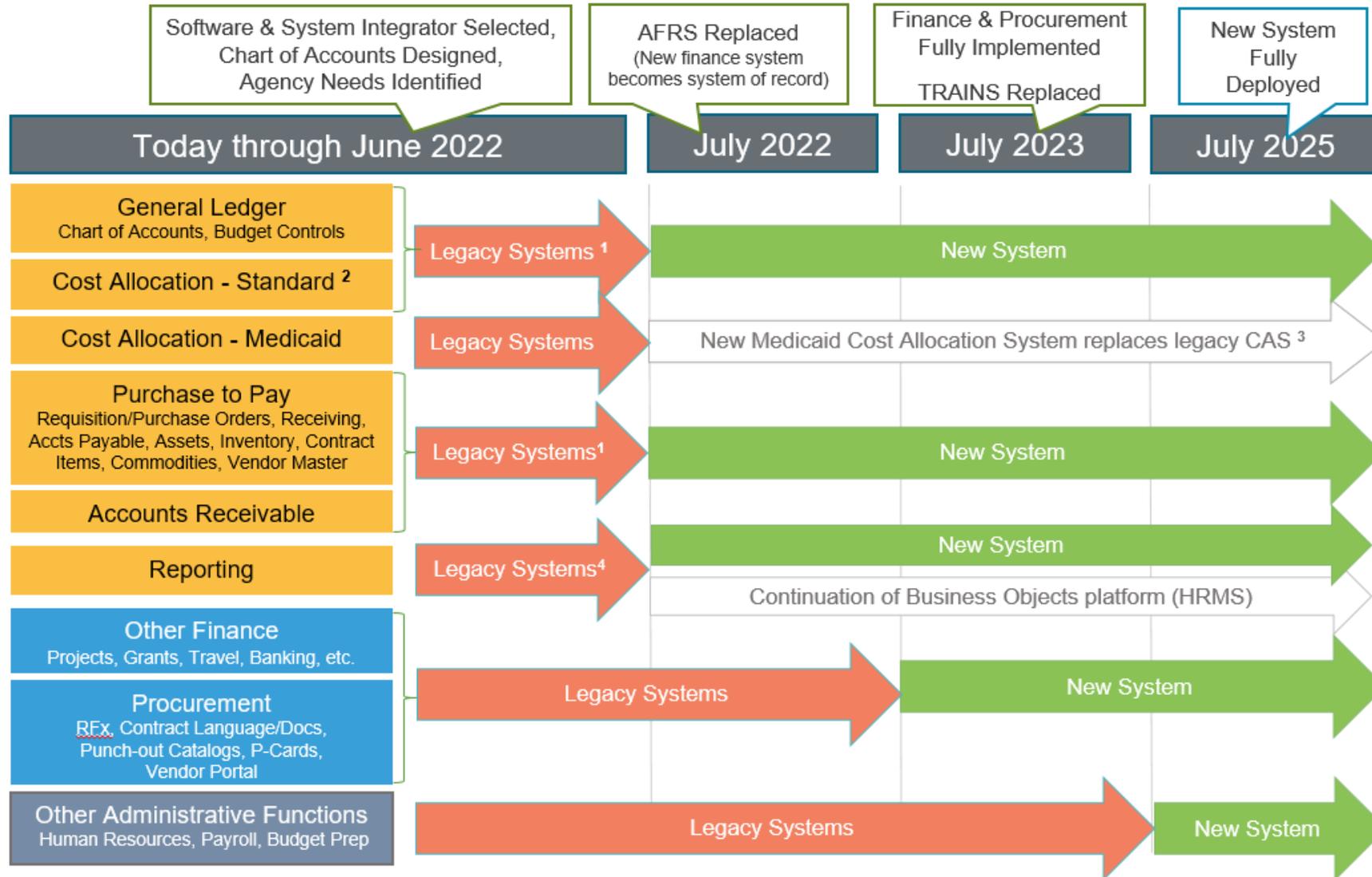
# Project Updates



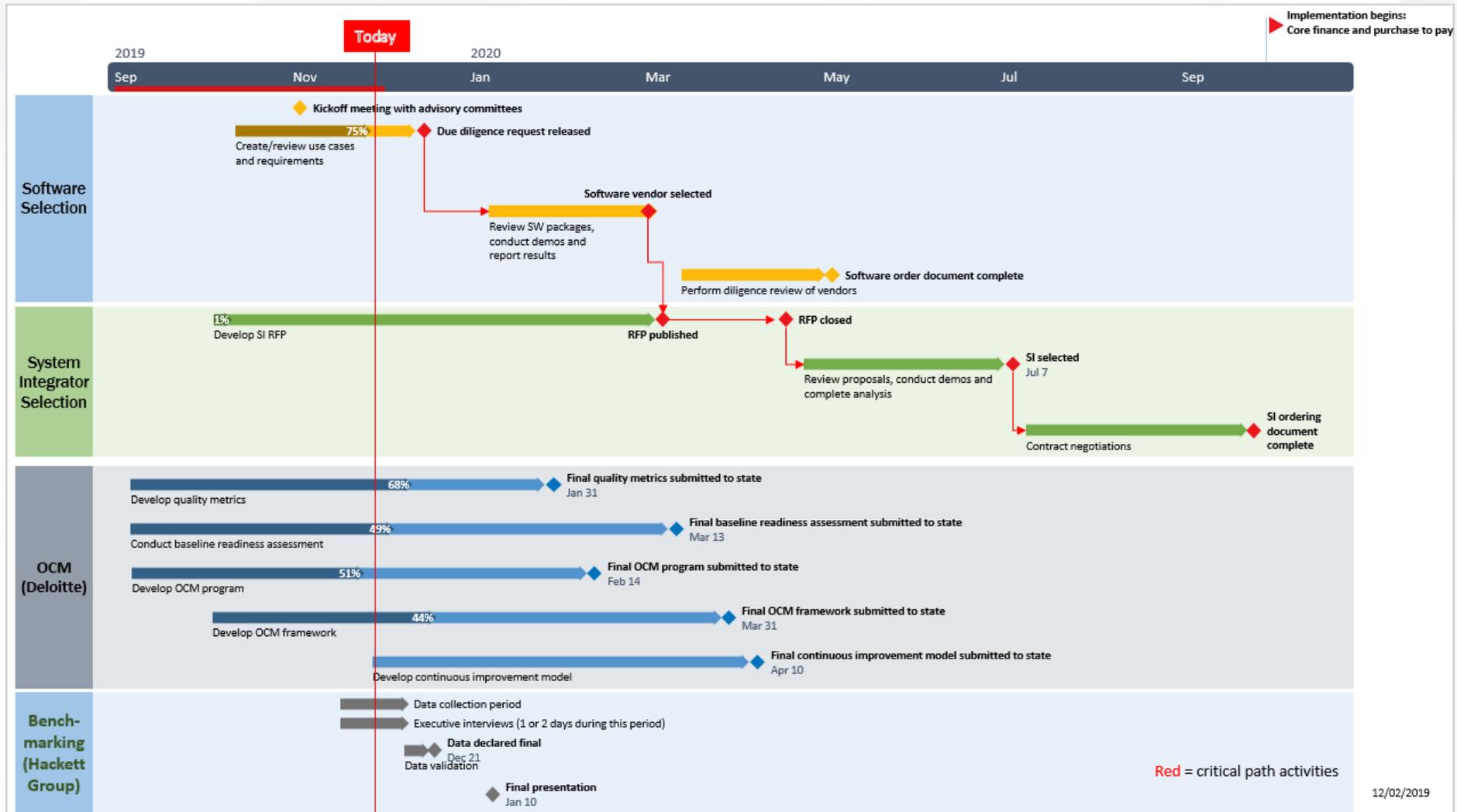
# Modernization Roadmap



# Scope: Functional Rollout Timeline



# Schedule - Phase 0: ERP Readiness



# Budget - Washington's Investment

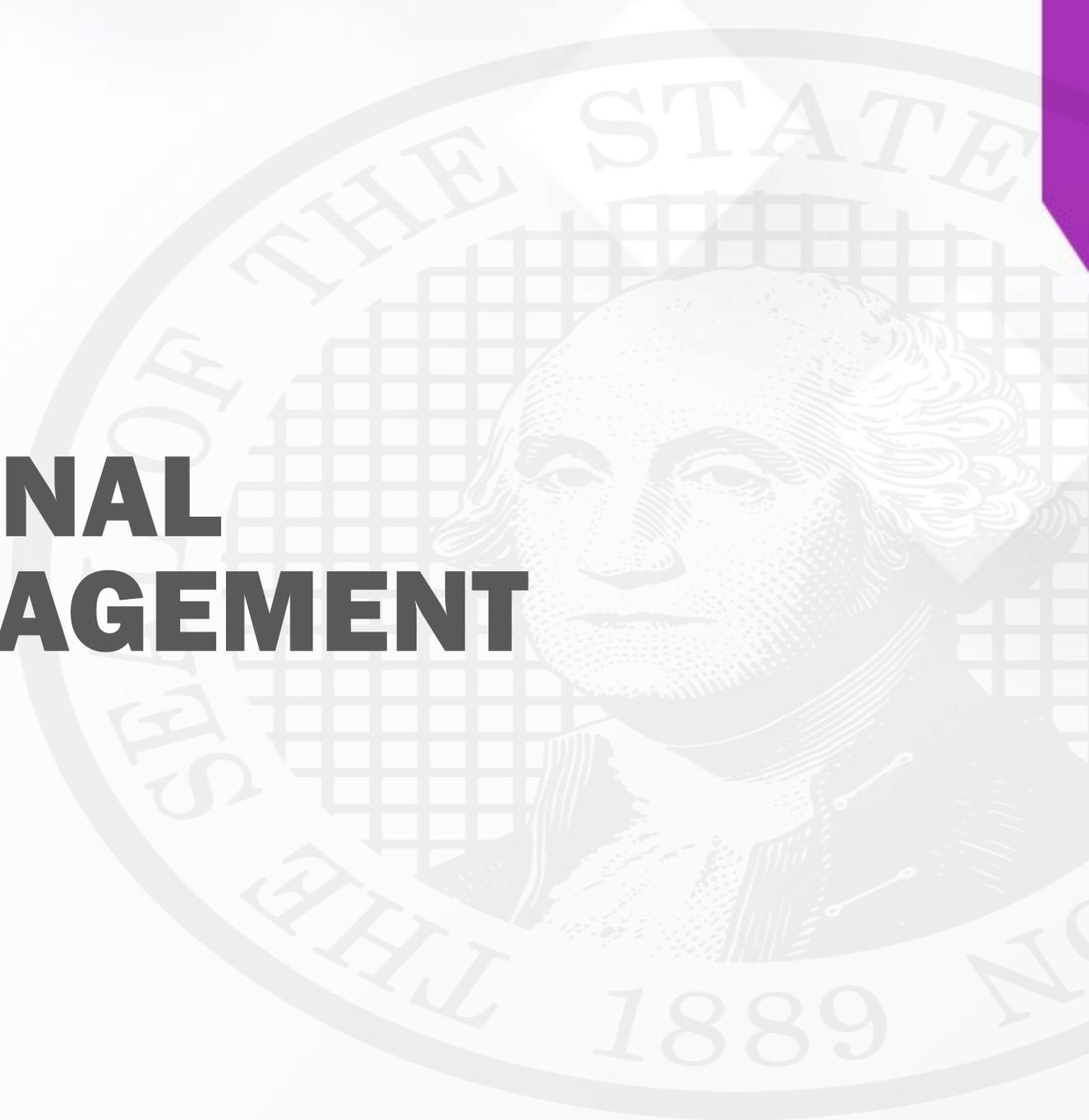
2013-15						2015-17		2017-19		2019-21		2021-23		2023-25	
<b>Governor's Proposed Budget</b>															
\$2.4M		\$3.2M		\$12.6M		\$59M		Biennial ask		Biennial ask					
<b>Enacted Funding</b>															
\$2.4M		\$2.0M		\$12.6M		\$18.4M (+Supp)									
<b>Outcomes</b>															
Business case		Readiness activities		Program Blueprint QA Investment plan Tech budget		Project lifecycle implementation plan ERP & OCM experts SW and SI selection		AFRS replaced (7/2022) Finance / purchasing "go live" (7/2022)		Full finance and procurement "go live" (7/2023) HR / payroll "go live" (7/2025)					

12/10/19

# With FY2020 supplemental funding...

- Continue program support
  - PMs, key IT, finance and procurement positions
- Continue industry partner support
  - System integrator, ERP advisory, SAAG, QA, OCM, procurement assistance
- ERP subscription begins
- Expand integration services
- AFRS replacement July 2022
- WSDOT in July 2023
- Cost allocation system (Medicaid) decoupling

# **ORGANIZATIONAL CHANGE MANAGEMENT**



# Organizational Change Management

---

The goal of OCM is to help employees impacted by OneWa understand why it is happening, how the change impacts their job, and what they can do to prepare for the change. One Washington has a team dedicated to OCM to prepare the State for the OneWa transformation and modernization efforts.



## Agency Readiness:

Agencies have been asked to complete a Baseline Readiness Assessment and a System/Interface inventory to understand the current state of people, processes, and technology. These surveys help to identify the **level of support** agencies may need for OneWa. Due Date: **December 6 and December 9 respectively.**



## Quality Metrics:

A set of Key Performance Indicators is being developed to enable Agency leaders to **measure progress** towards OneWa goals and identify challenges that may impact adoption of OneWa.



## Agency Sponsorship:

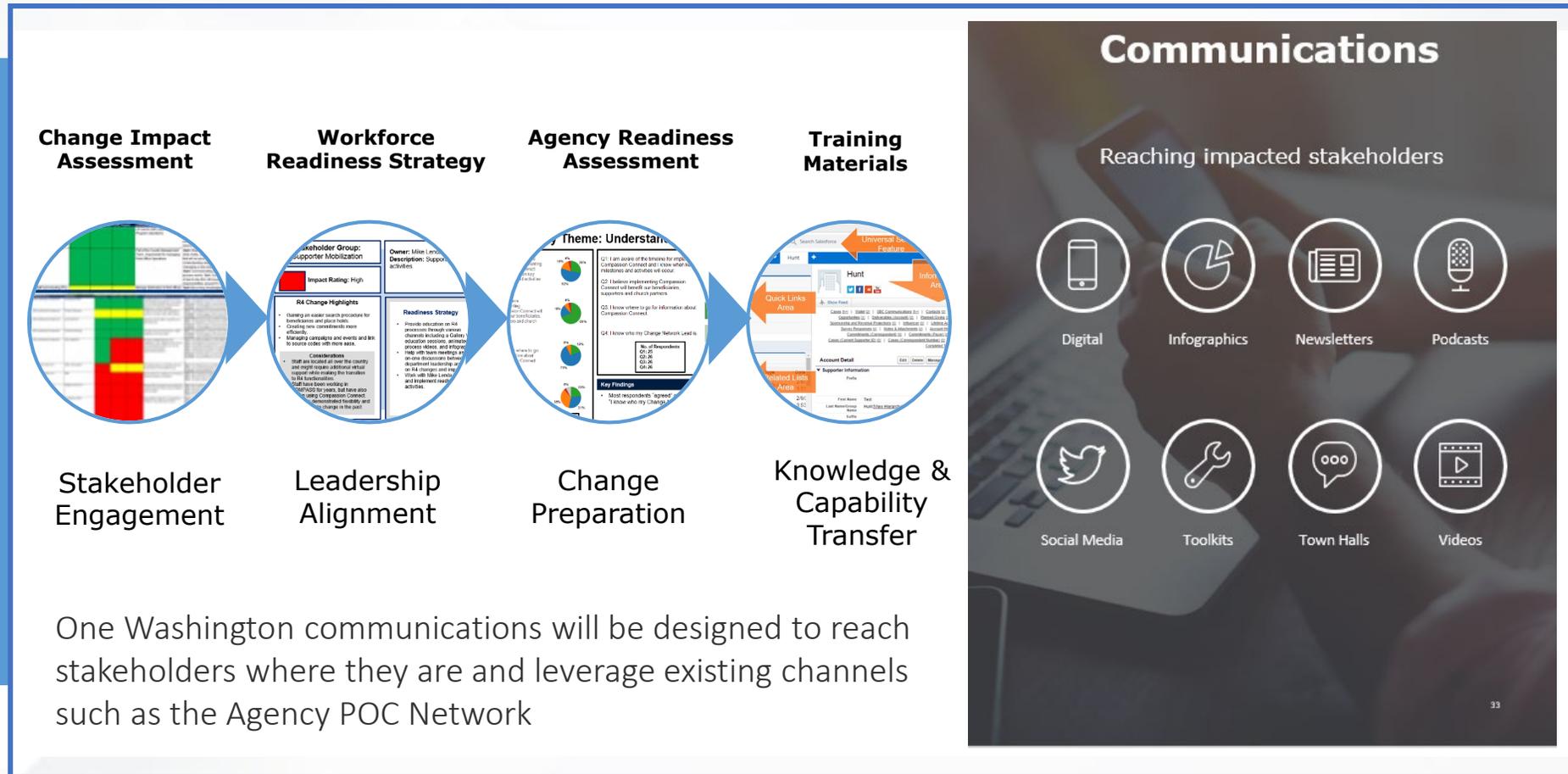
Development of an Agency Support Team where Agency Directors **champion an agency team** to prepare for OneWa. The Sponsor also maintains accountability for completing agency-specific plans and tasks in support of OneWa implementation activities.

## Example OneWa Tools and Accelerators for Agencies

Change Scout	<b>Central tool that houses and enables all of the featured accelerators below.</b>	
Tools & Accelerators	Description	Application/Value for OneWa
Stakeholder Analysis & Readiness Assessments	Generates reports and dashboards based on individual stakeholder assessments to show level of support and engagement by individual or stakeholder group.	Ongoing reviews of stakeholder analyses will help the OneWa team assess specific needs of stakeholder groups to determine how to best engage & communicate with them.
Communications Plan & Feedback Loops	Roadmap to deliver the right messages, to the right audiences, at the right time.	Communications planning allows for proactive messaging, move stakeholders from basic understanding to commitment, and adjust information based on feedbacks received.
Change Impact Assessment Toolkit	Information and instructions to help agencies identify changes to people, processes, and technology based on the future state of OneWa.	Helps leadership assess high, medium, and low impacts to stakeholder groups; helps OneWa and agencies implement appropriate change activities to manage impacts.
Learning Needs Assessment	Provides an overview on how to track stakeholders' learning to accelerate future skillsets and drive business adoption.	OneWa can track learning development and link to several other data objects such as: Plans; making it easier to track overall change adoption.
Change Adoption Dashboard	A report that shows stakeholders' readiness and willingness to adopt the new solution	Used to measure stakeholders' readiness and willingness to adopt OneWa – supported by pulse survey data.
Personas	Personas are fictional “characters” built to help humanize stakeholders and bring awareness to unique needs.	Helps leaders deepen their awareness of how OneWa may impact their employees.
Agency Readiness Checklists	List of activities that agencies need to complete each month for OneWa (such as data conversion, interface testing, communications distribution, townhall, etc.)	Allows agencies to plan the resources and time needed to prepare for pre and post implementation of OneWa.

# OneWa Communications Overview

Communications is an important success factor for One Washington; Stakeholder analyses and feedback loops will prioritize communications activities and agency outreach



# OCM SPOTLIGHT: DCV & CHANGESCOUT

Deloitte's Change: Vision to Value framework is built around guiding principles and executed through four iterative components aligned to Agile ERP implementation methods

Define for Purpose

Activities are repeated through Agile delivery cycles

Design for Impact



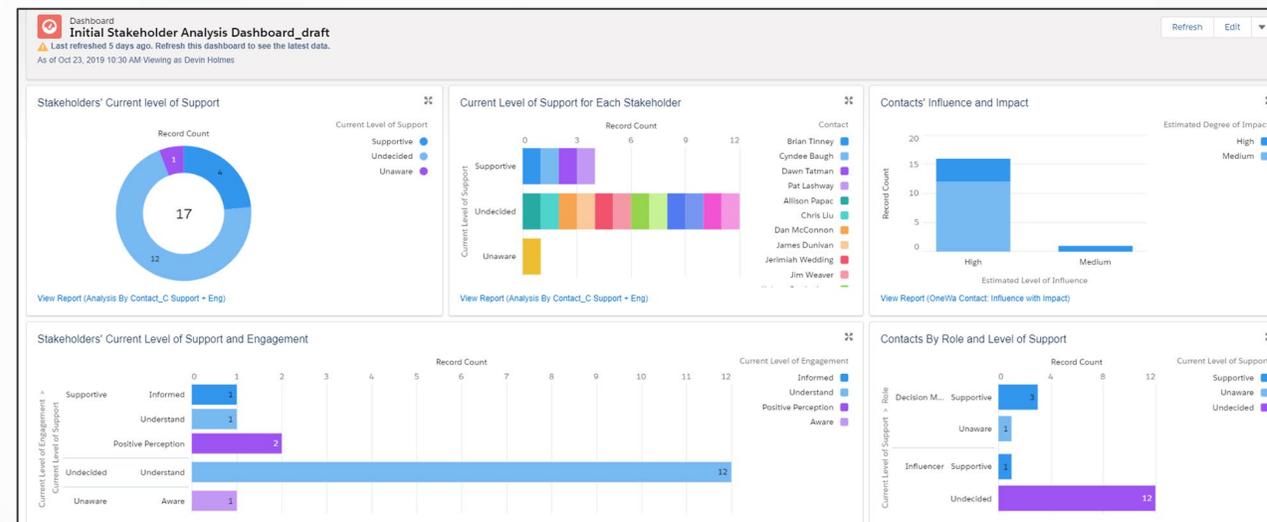
Drive Through Performance



ChangeScout

DCV is powered by ChangeScout, a digital application that provides comprehensive data management and insights specifically designed for organizational change management

## OneWa Initial Stakeholder Analysis Dashboard



# Technical

- **System inventories**

- Requested inventories and interfaces from the agencies by 12/9
  - Includes additional questions about technical readiness
- OneWa personnel are available to assist or answer clarifying questions
- Tracking of agencies who have submitted system inventories is posted on the OneWa website

- **Integration layer: Informatica**

- OFM's internal integration layer expanded 11/18 in support of migrating agencies interfaces to the integration layer by January 1, 2021
- Additional staffing is under solicitation

# Key Takeaways

*Must obtain enough funding to be successful - Virginia described it as a “\$40 million problem or a \$60 million success.”*

1. Scope validation with industry partners is complete.
2. Critical path for software and system integrator selection is on track.
3. Agency readiness/OCM is underway.
4. Technical integrations with WaTech, OCIO and OFM IT are in progress.





## **FOR MORE INFORMATION:**

Website: [one.wa.gov](http://one.wa.gov)

## **TO PROVIDE FEEDBACK:**

[onewa@ofm.wa.gov](mailto:onewa@ofm.wa.gov)



**One Washington**  
A Business Transformation Program



# Break

---

# Policy / Standard Review

---

# Where Are We?



# Information Technology Portfolio Foundation



## Purpose of action

- Request approval of existing policy and standards updates
- Request rescind of outdated policy



## Business case

- [RCW 43.105.225](#) , [RCW 43.105.230](#) and [RCW 43.105.341](#) for Portfolio Program
- Eliminate obsolete portfolio requirements
- Improves alignment with existing practices



## Key objectives

- Streamlines technology portfolio management policy
- Reduces complexity to program participants
- Improves portfolio alignment to business outcome



## Strategic alignment

- Supports efficient, effective and accountable government by clarifying portfolio requirements
- Improves ability to show technology portfolio alignment to business outcomes



## Implementation

- Agency can attest to portfolio standards during annual certification process
- Reduced reporting complexity for agencies



## Success criteria

- Increase number of agencies that can identify and report on portfolio components
- Reduced questions related to obsolete IT portfolio requirements

# Technology Business Management



## Purpose of action

- Request approval of sunset review update of existing policy and standards



## Business case

- [RCW 43.105.054 Section 2\(f\)](#) requirement for TBM Program
- Program has been operationalized with agencies performing review and update on a bi-yearly basis



## Key objectives

- Use data driven analytics to identify opportunities for efficiency and savings of IT expenditures
- Link IT expenditures to technology investment



## Strategic alignment

- Supports efficient, effective and accountable government by using industry standard taxonomy and common terms
- Shows what agencies get with their IT investments



## Implementation

- 47 agencies are using standardization to categorize IT spend by technology tower
- Bi-yearly check in with each agency to ensure accuracy in their reporting



## Success criteria

- Agency reporting is 100%
- Increased accuracy in coding IT spend
- More agencies can show value of IT to business service and monitor performance of investment

# 161.01 Geodetic Control Standard



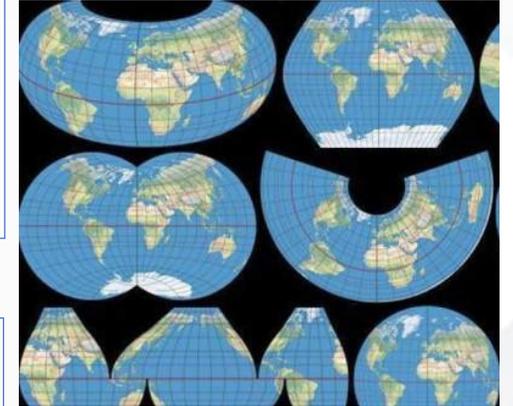
## Purpose of action

- Sunset review



## Business case

- Clarifying language in the standard to assist with agency implementation.
- Confirm the standard is still useful and valid.



## Key objectives

- Clarified codes to use for geospatial data.



## Strategic alignment

- This standard is still need to facilitate data exchange among state, local, tribal and federal users of geospatial data.



## Implementation

- Essentially the same standard, but added clarifying language
- Monitor for expected changes in RCW due to changing federal standards. Review and update again as needed.



## Success criteria

- This is already a successful policy

# 161.03 Hydrography Standard



## Purpose of action

- Sunset review



## Business case

- Clarifying language in the standard and update hyperlinks.
- Confirm the standard is still useful and valid.



## Key objectives

- Minimal language changes.



## Strategic alignment

- This standard is still need to facilitate data exchange among state, local, tribal and federal users of geospatial data.



## Implementation

- Essentially the same standard, but added clarifying language



## Success criteria

- This is already a successful policy



# 161.02 Geospatial Metadata Standard

# 161.05 Geospatial Application & Data Services Metadata Standard



## Purpose of action

- Rescind and incorporate into 187.10



## Business case



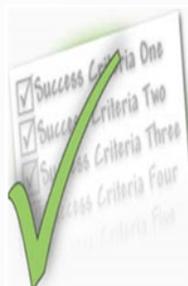
## Key objectives



## Strategic alignment



## Implementation



## Success criteria

# 187.10 Metadata Standard



## Purpose of action

- Combine three separate metadata standards into one



## Business case

- Agencies have a single standard to reference for creating metadata
- Metadata is need for documenting data and facilitate sharing



## Key objectives

- Combine three metadata standards into one



## Strategic alignment

- This standard is still need to facilitate data exchange among state, local, tribal and federal users of geospatial data.



## Implementation

- Should simplify the implementation for agencies
- Geospatial community is creating guidelines to augment this standard



## Success criteria

- This is already a successful policy

# Policy 188 & 188.10 - Accessibility



## Purpose of action

- Update existing policy and standard



## Business case

- Sets minimum accessibility standards
- Support agency compliance with state and federal requirements



## Key objectives

- Aligns with federal & industry standards
- Removes obsolete deadline dates from previous version



## Strategic alignment

- Supports efficient, effective and accountable government by aligning with current federal standards



## Implementation

- No significant impacts to agencies related to policy updates. The comments do highlight need for ongoing education on accessibility.



## Success criteria

- Ensures agencies are using most recent federal standards

# IT Strategic Planning

---

# Public Comment

---