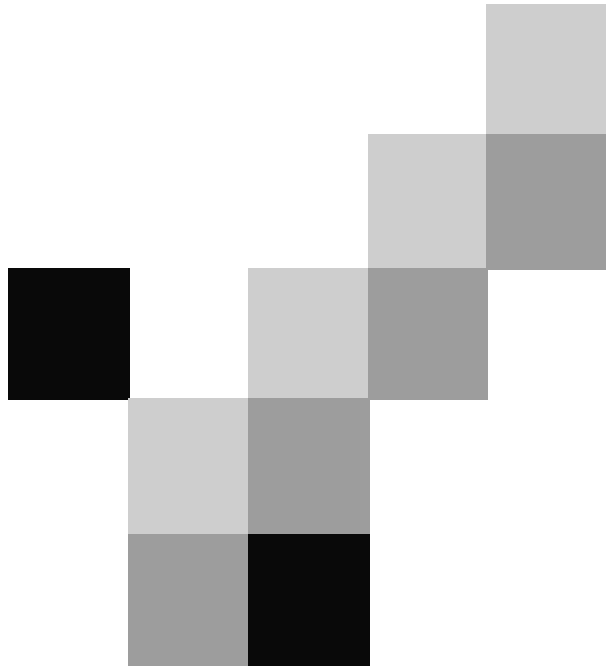


Migration Update

Northern Region

Wednesday, May 30, 2007



Introductions

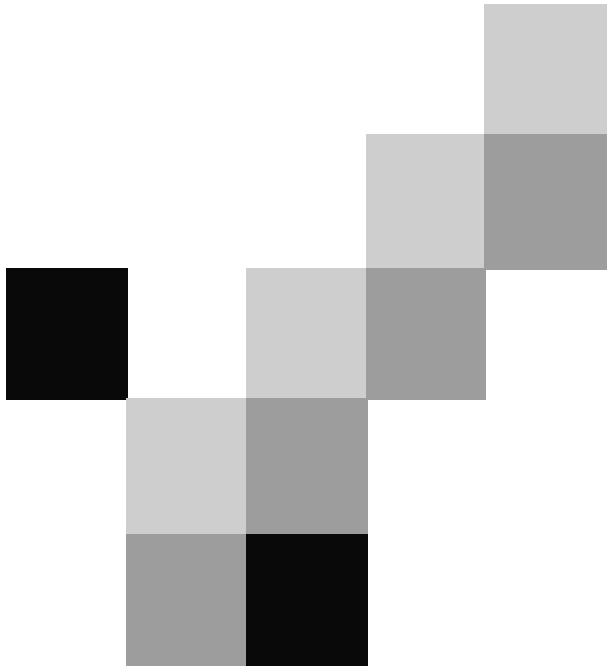
Presented by

John Boule and Glenn Helland



Agenda

- Introductions – John Boule and Glenn Helland
- Project Status Update – Betty Lundy
- Procurement Update – Nathan Merrill
- Statement of Work/Change Order Review – Nathan Merrill
- Development Project Overview – Seth Richman, Accenture
- Implementation Request For Proposal (RFP) Update – Debbie Masterson
- Implementation Readiness Deliverable Expectation Document (DED) – Sandy Harlow
- Wrap-up and Action Items



Project Status Update

Presented by
Betty Lundy



Planning Project Status Update

- Key Planning Tasks and Deliverables: November 2006 – June 2008
- Consortium Staff Acquisition for Development Phase
- Implementation Proposal Evaluation
- Hardware/Software Acquisition
- Key Upcoming Meetings

Planning Project Schedule

Key Tasks and Deliverables		Date
1.	Requirements Analysis Document	11/30/2006
2.	Sole Source Statement of Work (SOW)	12/18/2006
3.	Implementation Advance Planning Document (IAPD)	12/18/2007
4.	SOW Contract Negotiations	1/12/2007- 4/30/2007
5.	Submit Request for Proposal (RFP) for Consortia, State and Federal Government Review and Approval	2/8/2007- 6/28/2007
6.	Proposal Evaluation Guide and Cost Proposal Evaluation Guide	5/18/2007
7.	Proposal Evaluation Training Materials	6/20/2007
8.	Release Implementation RFP to Vendor Community	6/29/2007
9.	Draft Vendor Proposals Due	8/13/2007
10.	Evaluate Draft Proposals	8/14/2007 - 8/27/2007
11.	Conduct Confidential Discussions and Key Staff Interviews	9/5/2007 - 9/125/2007
12.	Best and Final Offers (BAFOs) Due	10/10/2007
13.	Evaluate Final Proposals	10/11/2007 - 10/31/2007
14.	Vendor Selection Report	11/15/2007
15.	Release Notice of Intent to Award	11/26/2007
16.	Contract Negotiations	11/27/2007 - 1/17/2008
17.	Implementation Advance Planning Document Update (IAPDU)	1/22/2008
18.	Migration Implementation Readiness Plan for Each County	4/16/2008
19.	Project Closure Report	5/16/2008



Consortium Staff Acquisition

- Recruitment and Selection of County Staff Assigned to Development Project
- Positions Advertised and Recruited from 35 Migration Counties
- Interviews Conducted 4/30 – 5/1
- Business Analysts, County Project Managers, Technical Manager and Administrative Positions Selected
- Target Start Date in Sacramento: 7/16



Implementation Proposal Evaluation

- Based on Original C-IV Evaluation Approach
- Business/Technical = 60%, Cost = 40%
- Implementation Proposal Evaluation Teams
 - Corporate Qualifications
 - Project Management and Staffing
 - Functional
 - Technical
 - Cost
 - Contract
- Work Split Between Counties and Sacramento



Hardware/Software Acquisition

- One Aspect of Overall Procurement Strategy
- Spans Development and Implementation Phases
- Three Approaches:
 - Local Hardware and Software and Implementation Project Site Hardware and Software: Implementation RFP/Contract
 - Development Project Site Hardware and Software needed in first 90 days (July – September 2007): Accenture
 - Central Hardware and Software and Development Project Site Hardware and Software needed after 90th day: Commodities Procurement (leveraging a designated County or Counties procurement process)



Key Upcoming Meetings

- Procurement Work Group: 6/19/07
 - Implementation and QA Proposal Evaluation Team Schedules, Responsibilities & Recommendations
- 39 County Joint Powers Authority (JPA) Board of Directors Meeting: 6/29/07
 - Elect Officers for SFY 07/08, Approve Implementation RFP, Approve Quality Assurance RFP, Overview of Change Order #27 and Development Project, and Budget Overviews
- Development Project Orientation: 7/10-7/11, 7/11-7/12 or 7/17-7/18
 - Provide information to Consortium staff assigned to Development Project
- Fiscal Summit Meeting: 7/24/07
 - Provide County Fiscal Managers and CPMC with key financial process and budget information
- Implementation Proposal Evaluation Training: Early August (Prior to 8/13)
 - Provide County Evaluators with processes and tools to complete draft and final evaluation steps



Procurement Update

Presented by
Nathan Merrill



Procurement Update Agenda

- Original Approach
- Current Strategy
- Current Approach



Original Approach

- Two Vendors – Existing Vendor and Implementation/Operations Vendor
- Two Data Centers – Existing and Implementation/Operations Vendor
- Existing Vendor
 - One Time Application Development Changes
 - Conversion
 - Interfaces
 - Forms/NOAs/Reports
 - Training Development
 - Bar Coding



Original Approach

Implementation/Operations Vendor

- Implementation – Managing and Monitoring
- Site Preparation and Installation
- Local Hardware and Software Acquisition
- Change Management
- Training Delivery
- Imaging/IVR Models (Central, Regional, Local)
- Operations



Current Strategy

Procurement Work Group Decision (Early December)

- Reduce cost and risk associated with two Operations Vendors and Data Centers
- Sole Source application development services to existing vendor
- Sole Source limited period of operational services for the 35 ISAWS Counties to existing vendor
- Competitively acquire implementation services
- Once operations services are stabilized, terminate the maintenance and operations portion of the current Accenture contract 34 months early (From August 2014 to October 2011)
- Competitively acquire maintenance and operations services for all 39 (35 ISAWS + 4 C-IV) Counties at the same time (will coincide with the early termination of the current maintenance and operations contract)



Current Approach

- Two Vendors – Existing Vendor and Implementation Vendor
- Existing Vendor
 - One Time Application Development Changes
 - Conversion
 - Interfaces
 - Forms/NOAs/Reports
 - Training Development
 - Operations (until October 2011)
- One Data Center – The ISAWS Counties will be migrated to the existing C-IV Production Data Center



Current Approach

Implementation Vendor

- Site Preparation and Installation
- Change Management
- Training Delivery
- Implementation – Managing and Monitoring:
 - Wave based approach and schedule
 - Implementation Support
 - Best Practices
- Imaging/IVR Models (Central, Regional, Local)



Existing Vendor Approach Comparison

Existing Vendor Original	Existing Vendor Current
One Time Application Development Changes	One Time Application Development Changes
Conversion	Conversion
Interfaces	Interfaces
Forms/NOAs/Reports	Forms/NOAs/Reports
Training Development	Training Development
	Central Site Preparation and Installation
	Operations



Implementation Approach Comparison

Implementation Original	Implementation Current
Implementation	Implementation
Change Management	Change Management
Training Delivery	Training Delivery
Central and Local Site Preparation and Installation	Local Site Preparation and Installation
Imaging/IVR	Imaging/IVR
Operations	



Statement of Work/Change Order Review

Presented by
Nathan Merrill



SOW/Change Order Review Agenda

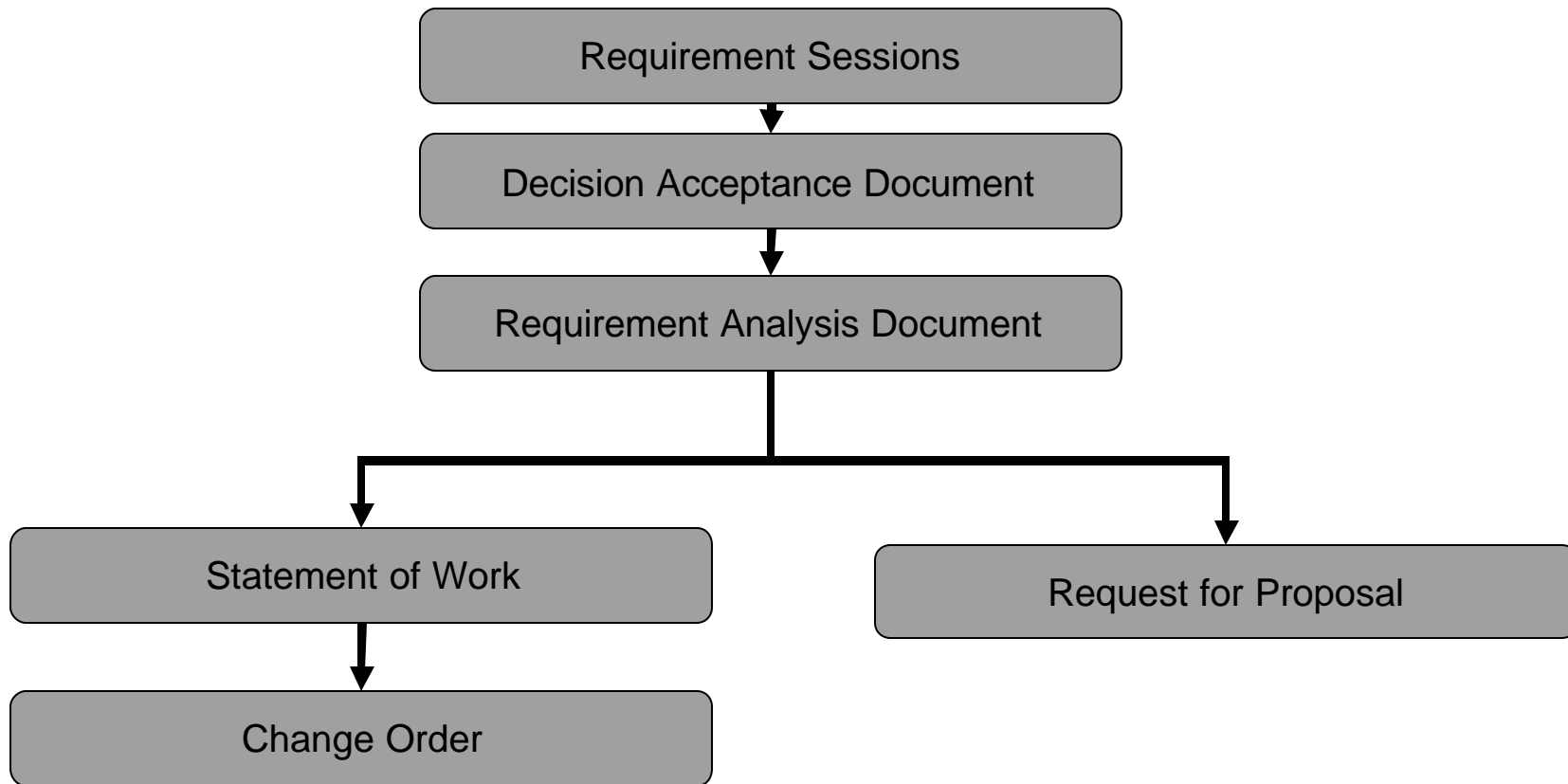
- Definitions
- Requirements Process
- Accenture SOW
- Negotiation Themes
- SOW Updates
- Development Process
- County Medical Services Program
- Forms and Reports
- Ad Hoc Reports
- Environments
- Policy Review and Training
- Training Development
- Bar Coding
- Batch and Interfaces
- Conversion
- Site Preparation and Installation
- Operations
- SOW Deliverables



Definitions

- Accenture Statement of Work (SOW) = Document that describes work to be done by Accenture to bring the Migration Counties to C-IV
- Change Order = Part of new contract amendment and includes the following:
 - Statement of Work
 - Schedule
 - Assumptions
 - Financials
- Contract Amendment = Modifies the existing contract and includes the following:
 - Change Order
 - Terms and Conditions

Requirements Process





Accenture SOW

- SOW Negotiations with Accenture
 - January 12, 2007 – April 30, 2007
- SOW became part of C-IV Change Order #27, Contract Amendment #32
- C-IV Change Order #27, Contract Amendment #32 will be approved by the C-IV Consortium on June 29, 2007, which will be represented by all 39 Counties
- SOW is subject to State and Federal review and approval, which is in process



Negotiation Themes

Collective Negotiation Points

- Build on existing Contract Agreement
- Leverage existing processes and procedures and management resources
- Reach consensus on the scope and level of effort
- Liability and risk – hold the Vendor accountable
- Coming to an Agreement

C-IV, ISAWS, OSI, CDSS and CDHS

- Cost effective means to migrate the 35 Counties to C-IV within the IAPD budget



SOW Updates

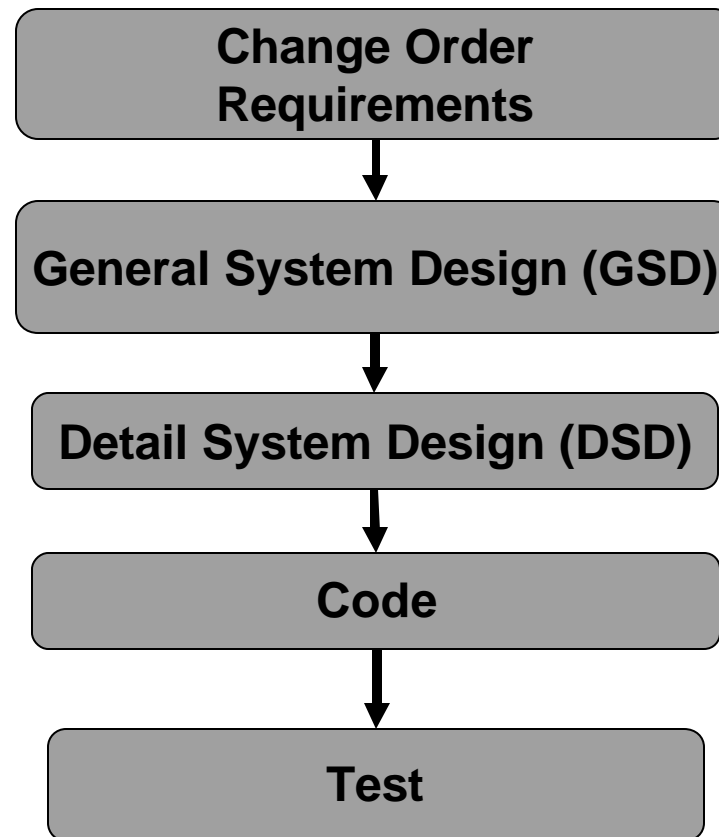
Project Management

- All Requirements have been met
- Leverage the same processes and procedures that Accenture currently conducts
- Leverage the same Project Control Document, which describes Issues, Risk, Scope Management, but use a separate work plan
- Experienced Management resources will be shared across both projects
 - Will reduce costs

Project Site/Facility

- All Requirements have been met
- The existing project facility will be expanded
- Project Website will be developed and shared for all 39 Counties
 - Project Documentation
 - Project Meeting Minutes/Agendas

Development Process





County Medical Services Program

CMSP

- All requirements have been met
- CMSP will be integrated into Medi-Cal hierarchy as a separate subprogram
- The core assumption is that a customer cannot apply for CMSP without applying for Medi-Cal
- When a customer applies for Medi-Cal and requests to be tested for CMSP, the System will evaluate Medi-Cal eligibility first, and CMSP second
- The C-IV System will include a mechanism for tracking the CMSP applications and re-applications separately
- 13 CMSP Reports
- 16 CMSP NOAs
- 31 CMSP Forms

Forms and Reports

- Through negotiations with the State and the Vendor the number of forms and reports were reduced

	Forms	Reports
Original	105	63
Current	10	20

- Migration Counties will leverage the existing forms and reports
- Gaps will be identified between ISAWS needs and what C-IV provides
- Migration Counties will participate in the Forms/NOAs and Reports subcommittees
 - Will utilize C-IV current System Change Request (SCR) maintenance and operations process to benefit all 39 Counties



Ad Hoc Reports

- All Requirements have been met
- Crystal Reports will be the Ad Hoc tool for the Migration Counties
- An Ad Hoc Instructor Led Training (ILT) course will be developed for Crystal Reports
 - Accenture will develop the course material
 - Implementation Vendor will deliver the course to Migration Counties Ad Hoc Report users
- The Enhanced Data Reporting (EDR) Database will be made available to the Migration Counties
 - EDR is a Separate database to connect County Applications, pull data, and perform data mining activities

Environments

**Scratch Pad
And
Remote UAT**



**Policy
Review
and
Training
(PRT)**



Policy, Review and Training

PRT

- All Requirements have been met
- A PRT environment will be provided for the manipulation of case data without affecting production data
 - All Counties will have access to PRT from their own Counties
 - PRT will have the same major code version as in Production; major releases are deployed monthly
 - No Interfaces will be executed
 - POP, DTS POP Counties and non-managed users can access PRT
- No generated documents from production are available in this environment
- The 'Rush Warrant' print button is not available
- The PRT environment will support 850 concurrent users; each County will designate PRT users



Training Development

- All Requirements have been met
- Accenture will be responsible for developing two new courses:
 - CMSP
 - Ad Hoc reporting
- Accenture will train the Implementation Vendor's trainers
- Accenture will provide and support training environments that the Implementation Vendor will use to deliver



Bar Coding

- All Requirements have been met
- The existing Bar Code forms will be provided to the Migration Counties
- New Forms to be Bar Coded will be prioritized through the sub-committee SCR maintenance and operations process to benefit all 39 Counties
 - CMSP 210 (Application for County Medical Services Program-CMSP)
 - MC 210 RV (Medi-Cal Annual Re-determination)
 - MC 210 (Medi-Cal Mail-In Application)
 - QR 3 (Mid-Quarter Status Report for Cash Aid and Food Stamps)



Batch and Interfaces

- All Requirements have been met
- Accenture will leverage existing Batch and Interface programs
- 29 existing C-IV Interfaces will be replicated, utilizing one common file format
- Eight new Interfaces will be developed:
 - Foster Care Provider Updates
 - 1099 Reporting Interface
 - Auditor/Controller
 - ✓ Four separate Auditor/Controller Interfaces are required (Two Monthly; Two Daily)
 - ✓ One each for Standard and Local Benefit Issuance layouts
 - Direct Deposit
 - ✓ Two Interfaces – One Daily and One Monthly



Conversion

- All Requirements have been met
- Accenture will convert data from the following two source systems:
 - ISAWS Mapper
 - ISAWS WTW
- The ISAWS Counties will convert GEMS and VACS into ISAWS before ISAWS is converted to C-IV
 - Will utilize the ISAWS MCR process
 - This bridged the gap between the Consortium and Accenture and help reach an agreement



Conversion

- Adopted a wave-based strategy
 - Implement the Migration Counties in three waves
 - ✓ Reduces the risk of a “Big Bang” approach
 - ✓ Migration Counties will implement sooner (First wave complete in August 2009)
 - ✓ Each wave represents conversion activities similar to a large County such as San Bernardino County (approx 2,300 users); a conversion size that has been proven
 - ✓ Allows Accenture, the Consortium and Migration Counties to leverage experiences from previous deployments
- No Pilot is necessary since C-IV is a proven solution
- Each wave will be conducted in two parts
 - Part One - Create a resource data bank that will include service provider and employer information. The infrastructure to support the C-IV application will be deployed
 - Part Two – One month after Part One, Part Two will integrate case management, eligibility, and benefits activities



Central Site Preparation and Installation

- All Requirements have been met
- Accenture will perform Site Preparation and Installation activities:
 - Application Development Facility (ADF) - Project Site
 - Development Data Center (DDC)
 - Network Operations Center (NOC)
 - Central Help Desk Facility
 - Central Print Facility
 - Productions Data Center (PDC)

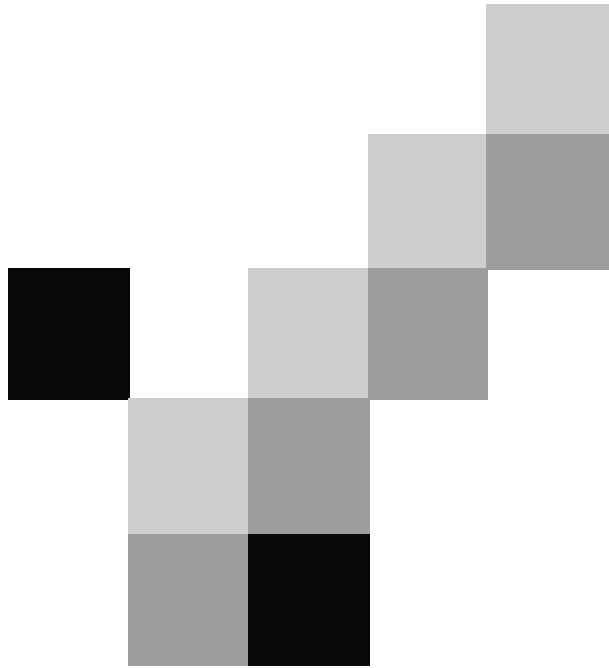


Operations

- All Requirements have been met
- The Managed, POP, and DTS POP Network Models will be implemented as discussed during the Requirements Gathering Meetings
- Accenture will leverage existing processes and procedures to support the Migration Counties
- Accenture will provide Help Desk Support for those Migration Counties that have elected the Central Help Desk Level 1 Option
- Project Help Desk and Tracking tool will be CA Unicenter

SOW Deliverables

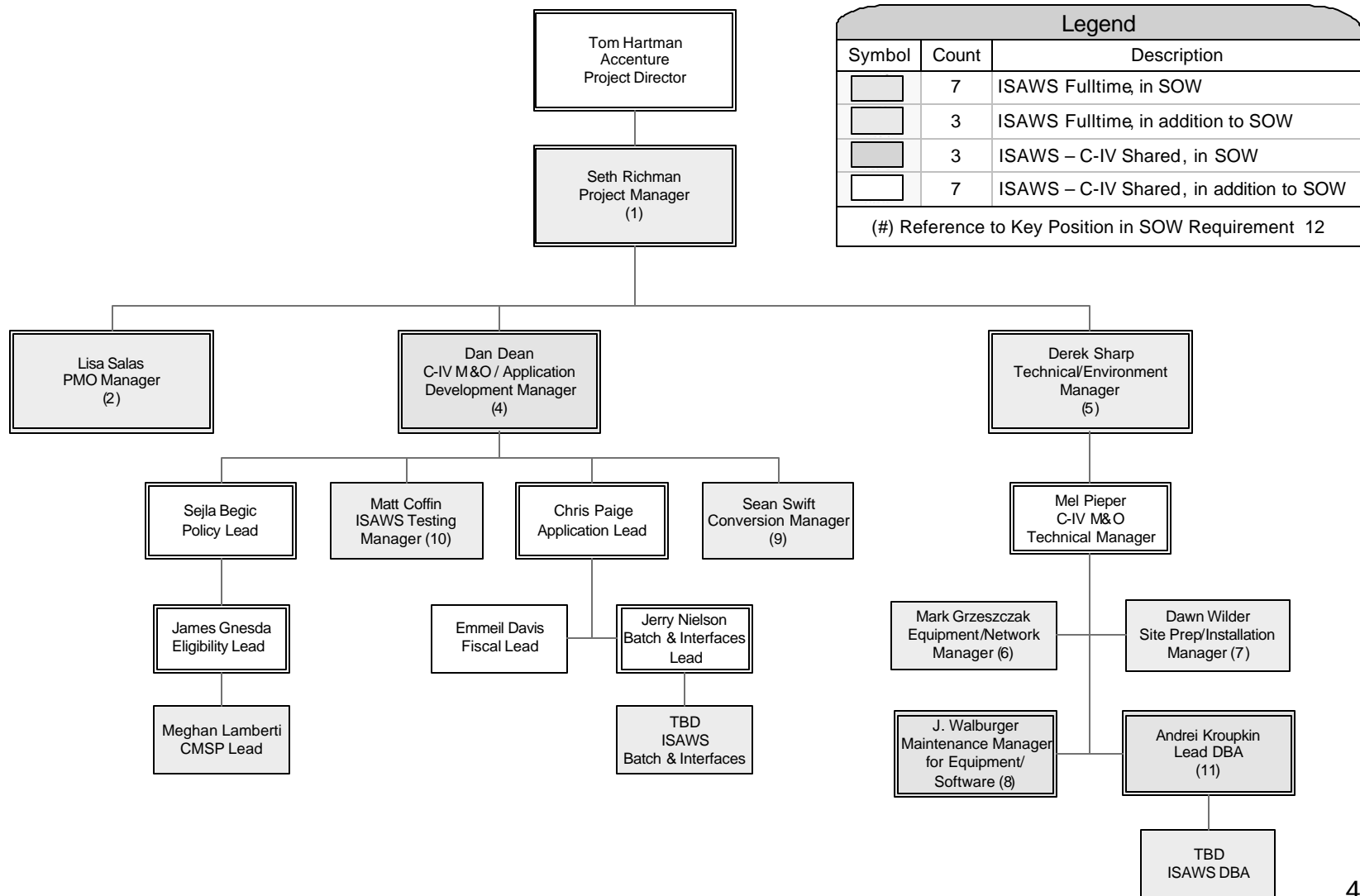
1.	Project Control Document Initial	16.	Equipment and Software Specifications and Acquisition Plan
2.	Project Control Document Updates (Quarterly)	17.	Technology Refresh Plan
3.	Migration Work Plan Initial	18.	Equipment and Software Specification List
4.	Migration Work Plan Updates (Monthly)	19.	Network Infrastructure Design Plan
5.	Detailed System Design	20.	Site Preparation and Installation Plan – Production Data Center
6.	Batch Processes and Interface Migration Plan	21.	Site Installation Completed – Production Data Center
7.	Overall Test Plan	22.	Site Preparation Plan – Development Data Center
8.	System Test Plan	23.	Site Installation Completed – Development Data Center
9.	Stress and Performance Test Plan	24.	Site Preparation Plan – Application Development Facility
10.	Training Environment Support and Deployment Plan	25.	Site Installation Completed – Application Development Facility
11.	Training the Other Vendor Plan	26.	Site Preparation Plan –Operations Facility
12.	Deployment Completed (for each County)	27.	Site Installation Completed – Operations Facility
13.	Overall Conversion Plan	28.	System Operations and Support Plan
14.	Conversion Plan (for each deployment wave)	29.	Disaster Recovery Plan
15.	Conversion Plan Tasks Completed (for each deployment wave)	30.	System Operations and Support Plan Updates (Quarterly)



Development and Schedule Overview

Presented by
Seth Richman, Accenture

Accenture Organization Chart



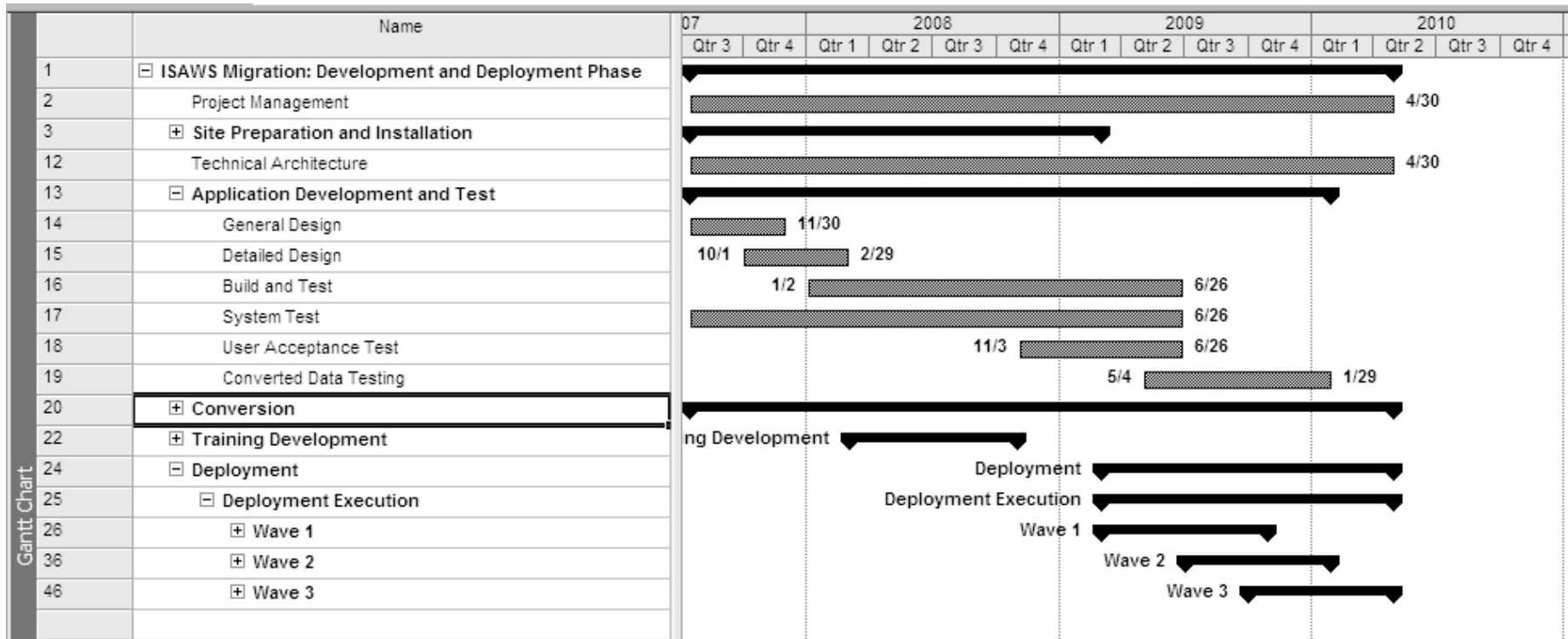
Legend		
Symbol	Count	Description
	7	ISAWS Fulltime, in SOW
	3	ISAWS Fulltime, in addition to SOW
	3	ISAWS – C-IV Shared, in SOW
	7	ISAWS – C-IV Shared, in addition to SOW
(#) Reference to Key Position in SOW Requirement 12		



Accenture Responsibilities

- Program Management
- Application Design, Development, and Testing
- Technical Architecture and Support
- Conversion and Deployment
- Central Site Preparation and Hardware/Software Installation
- Training Development
- Maintenance and Operations

Migration Development and Deployment Project Schedule





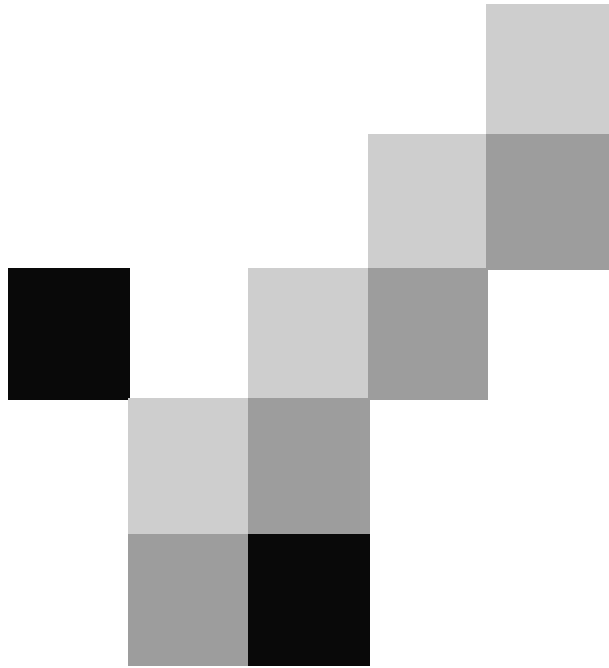
Guiding Principles

- Open Communication – Open Door Policy
- No Surprises
- No Team/Organizational Boundaries
- Work Together for Mutual Success
- Enjoy our Work



Integration Philosophy

- System must meet the business needs of the County
 - Core functionality in common
 - Customize when necessary
- County involvement in all aspects of development and operations
- Single workstation will access applications that serve the business needs
- Vendor provided Maintenance and Operations with County staff involvement (shared support)
 - Details will be negotiated through Service Level Agreements (SLAs)
- Single office communications software in County Departments (e-mail/scheduling)
- C-IV workstations configured to allow access to existing county systems where needed



Implementation Request for Proposals (RFP) Update

Presented by

Debbie Masterson



Implementation RFP Agenda

- Overview
- Procurement Schedule
- RFP Structure
- Procurement Library
- Implementation Project Schedule
- Vendor Requirements and Scope of Work
 - Project Management
 - Infrastructure (General Equipment and Software Requirements; Site Preparation and Installation)
 - Imaging and IVR
 - Implementation
 - Change Management
 - Training Development and Delivery
 - Project Site/Facility
 - Deliverable Approval Process
- Proposal Evaluation and Selection



Overview

- Soliciting Proposals for:
 - One-Time Implementation Goods and Services
 - Development, Implementation and Support of the Imaging and IVR Systems
- Expect Proposals Clearly Demonstrating:
 - Understanding the Implementation Needs of the Migration Counties
 - The Vendor's Experience in Effectively Implementing Similar Systems
 - Realistic and Well-Considered Schedule and Cost
- Cost Proposals that Include Firm Fixed Prices for:
 - Each Implementation Deliverable
 - All Required Local Equipment and Software and Associated Maintenance
 - Staff Hourly Rates for Implementation and Support Services
 - Facilities (Project Site, Training and Support)

Procurement Schedule

Activity		Date
1.	Procurement Library Open to Vendors	01/31/07
2.	Release of RFP	6/29/07
3.	Written Questions Accepted from Vendors	7/2 – 7/17/07
4.	Vendor Conference	7/23/07
5.	Letter of Intent to Respond Due Date	7/26/07
6.	Release of Answers to Questions	7/30/07
7.	County Site Visits Organized by Region	TBD – Coordinated with the Counties
8.	Draft Proposals Due	8/13/07
9.	Confidential Discussions, Oral Presentations & Key Staff Interviews	9/5 – 9/25/07
10.	Final Proposals Due	10/10/07
11.	Release of Notice of Intent to Award	11/26/07
12.	Contract Negotiation Period	11/27/07 – 1/17/08
13.	Federal, State and JPA Board Approval of C-IV Agreement	5/30/08



RFP Structure

RFP Sections

- 1.0 General Information
- 2.0 Procurement Process and Conditions
- 3.0 Migration Project Description
- 4.0 Vendor Requirements and Scope of Work
- 5.0 Proposal Structure and Submission Requirements
- 6.0 Proposal Evaluation and Selection
- 7.0 Agreement Requirements
- 8.0 Deliverables List



RFP Structure

RFP Attachments

1. Contents of the Procurement Library
2. Confidentiality Statement
3. Vendor Touch Point Management Process
4. Agreement
5. Migration County Training Delivery Survey Results
6. C-IV Training Course Information
7. Migration County Staff Training Information
8. Equipment and Software Configurations
9. County Site Information
10. Managed Network Site Information
11. Local Area Network Standards
12. Business Proposal Requirements Cross-Reference Matrix
13. Cost Proposal Requirements Cross-Reference Matrix
14. Cost Proposal Forms
15. C-IV Certification Process
16. ISAWS County Sizes by Person Counts Per Program
17. Implementation Consortium Project Team Position Descriptions
18. Glossary



Procurement Library

- **Procurement Library accessible via the Internet at**
<http://www.isawsconsortium.org/migration/library.htm>
- **Categories:**
 - C-IV Original Development and Implementation Deliverables
 - ISAWS Migration Project Deliverables
 - County Site Information
 - C-IV Source Code License Agreement

Estimated Implementation Project Schedule

Implementation Vendor Tasks		Start Date	End Date
1.	Site Preparation Planning & Surveys	6/1/08	9/30/08
2.	Implementation Planning & Preparation	6/1/08	2/27/09
3.	Local Equipment & Software Acquisition, Configuration & Installation	10/1/08	9/30/09
4.	Training Planning & Preparation	12/1/08	2/27/09
5.	Change Management Planning & Preparation	12/1/08	2/27/09
6.	Imaging & IVR Planning, Preparation & Implementation	12/1/08	4/30/10
7.	Training Development & Delivery	3/2/09	3/5/10
8.	Conduct Change Management Activities	3/2/09	4/30/10
9.	Implementation Complete		4/30/10
10.	Imaging & IVR Support	5/1/10	10/31/11



Vendor Requirements and Scope of Work

- Project Management
 - No major changes/deletions in the Project Management area
 - Utilize same processes and procedures that the C-IV Consortium currently uses
- Infrastructure (Equipment, Software, Site Preparation and Installation)
 - Vendor will develop and execute an Equipment and Software Acquisition Plan
 - Vendor will conduct County Site Surveys
 - Vendor will develop and execute County Site Preparation and Installation Plans
 - Vendor will acquire Local Equipment and Software necessary to run the System
 - Vendor will certify that the C-IV Project standards and your requirements have been met or exceeded and each County Site is ready for the System to be operated by Accenture



Vendor Requirements and Scope of Work

➤ Imaging and IVR

- Vendors are required to propose Imaging and IVR solutions and pros and cons for each of the following models:
 - ✓ Central
 - ✓ Regional
 - ✓ Local
- The Migration Counties will determine which model best meets their business needs balanced with cost effectiveness
- The Vendor will implement and support the Imaging and IVR systems through October 2011



Vendor Requirements and Scope of Work

➤ Implementation

- Execute the Implementation Plan which is the framework and is integrated with Site Preparation and Installation of Equipment and Software, Training Development and Delivery, Change Management, and Conversion
- The System will be implemented in three waves based on geographic location and caseload/staffing sizes of the Counties
- The Vendor will provide on-site post-Implementation support for each County for 60 calendar days supplementing the County Coaches

➤ Change Management

- The Vendor will conduct as is/to be analysis in each County
- The Vendor will produce County and role-specific Change Discussion Guides describing in detail the process changes resulting from the new System which affect the way staff perform their jobs



Vendor Requirements and Scope of Work

- Training Development and Delivery
 - Develop training for the new Imaging and IVR sub-systems and training on how to use the Bar Coding equipment
 - Acquire the facilities, equipment, software, furniture, and all other training equipment necessary
 - Schedule and track the training using the tool currently utilized by the Consortium, Learning Management System (LMS)
 - Deliver training (both classroom and WBT) to all staff – for example eligibility staff will receive approximately 70 hours of training and supervisors will receive approximately 90 hours
 - Prepare each County to conduct and deliver training to their staff after Implementation and initial training is complete



Vendor Requirements and Scope of Work

➤ Project Site/Facility

- The Vendor will provide office space, furniture, equipment and software (such as Microsoft Outlook for email) for all Project staff no more than 10 miles from the existing Consortium development site
- The Vendor will utilize the Consortium website to publish, store, version, collaborate and categorize Project documentation, agendas and meeting minutes
- The Vendor will provide orientation to Project staff on Project site equipment, software and procedures

➤ Deliverable Approval Process

- The Vendor will provide a Deliverable Expectation Document (DED) to the Consortium in advance of the scheduled start of any task or subtask that will produce the Deliverable
- All Deliverables will be reviewed and approved or rejected by the Consortium



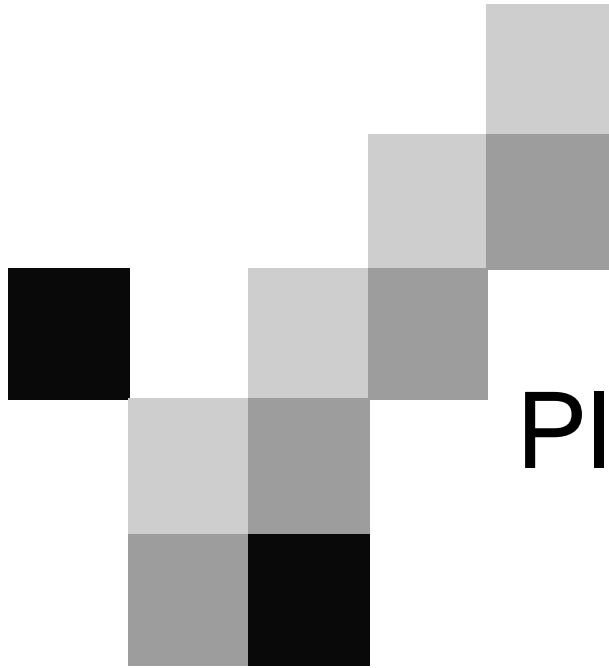
Implementation Deliverables

1. Requirements Traceability Matrix
2. Project Control Document Initial
3. Project Control Document Updates (Quarterly)
4. Work Plan Initial
5. Work Plan (Monthly)
6. Equipment and Software Acquisition Plan
7. General Site Preparation and Installation Plan
8. County Site Preparation and Installation Plan (for each County)
9. Site Installation Complete (for each County)
10. Implementation Project Site Preparation and Installation Plan
11. Implementation Project Site Installation Complete
12. Imaging Plan
13. Transition Plan
14. IVR Plan
15. Implementation Plan
16. Implementation Complete (for each County)
17. Change Management Plan (for each County)
18. Master Training Delivery Plan
19. Training Delivery Transition Plan



Proposal Evaluation and Selection

- The Evaluation Teams will be established and trained prior to receipt of the Draft Proposals currently scheduled for August 13, 2007
- The Draft Proposals will be reviewed and an agenda will be prepared listing items to be discussed with each Vendor based on issues and/or concerns noted by the Evaluation Team
- Confidential discussions, oral presentations and key staff interviews will be conducted
- Final Proposals will be evaluated and ranked
- Final selection will be documented in the Vendor Selection Report
- Vendor Selection Report will be approved by the C-IV JPA Board of Directors



Implementation Readiness Plan Deliverable Expectation Document (DED)

Presented by
Sandy Harlow



Implementation Readiness Plan DED Agenda

- Explain the Implementation Readiness Plan DED and the Implementation Readiness Plan
- Communicate the Timelines and Lifecycle for the Implementation Readiness Planning
- Review the Implementation Readiness Plan DED
- Request County input for the Implementation Readiness Plan DED



Implementation Readiness Plan DED

Implementation Readiness Plan DED

- Produces the outline and identifies the components of the Implementation Readiness Plan

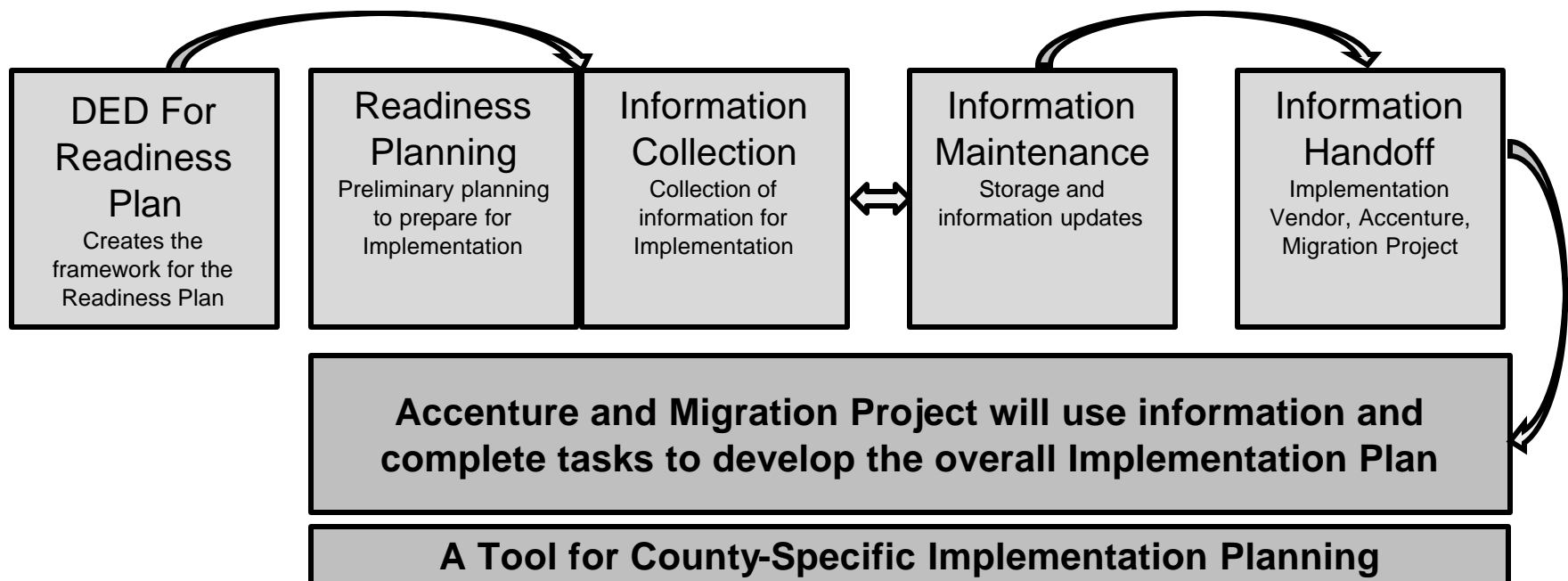
Implementation Readiness Plan

- A single generic plan developed for Migration Counties that will produce consistent information
- A single document that will facilitate between the Migration Counties and vendors two-way communication
- A method for information storage and maintenance
 - Within the County and on the Project Website
- A tool for Counties to use in preparing for the implementation of the C-IV System

Implementation Readiness Planning Overview

Step	What	Description	Who Is Responsible	When
1.	Implementation Readiness Plan DED	The framework for the Implementation Readiness Plan	<ul style="list-style-type: none"> • Planning Vendor (FDGS) • Counties 	<ul style="list-style-type: none"> • Now - June 30, 2007
2.	Implementation Readiness Plan	Plan 1 (early plan where county information is stored in one central place)	<ul style="list-style-type: none"> • Planning Vendor (FDGS) provides a template for each of the 35 Migration Counties • Counties provide the content and complete the document 	<ul style="list-style-type: none"> • April 2008 - Fall 2008
3.	Implementation Plan	Plan 2 (The "Big Plan")	<ul style="list-style-type: none"> • Implementation Vendor 	<ul style="list-style-type: none"> • Fall 2008 - Spring 2009 • Wave 1 begins June 2009

Lifecycle of the Implementation Readiness Plan





Implementation Readiness Plan DED

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Organization Structure

Section 3.1 of the DED

- 3.1.1 Project Organizational Structure
 - 3.1.1.1 Consortium Migration Project Organizational Chart
 - 3.1.1.2 Consortium Migration Project Position Descriptions
 - 3.1.1.3 Accenture Migration Project Organization Chart
 - 3.1.1.4 Implementation Vendor Organization Chart



County Organizational Structure

Section 3.1.2 of the DED

- Provides an overall view of the structure of the organization
- Identifies the departments and units that will be directly and indirectly impacted by the implementation of the C-IV System
- Creates the County Master Contact List



County Position Descriptions

Section 3.1.3 of the DED

- Identify and collect a list of County positions that will be affected by the implementation of the C-IV System
- Information will eventually serve as input to the Change Discussion Guides that the Implementation Vendor will create



Formal County Communication Protocols

Section 3.2 of the DED

- Identify formal County communication protocols and structure
- Creates supporting documentation for the Implementation Vendor Implementation Plan and Change Management Plan
- Internal County Communication 3.2.1
 - Develops the framework for distributing information and updates to departments, units and individuals
 - Identifies persons responsible for the direct communication and the methods of information distribution for County social/human service departmental communication plans
- External County Communication 3.2.2
 - Identifies any entity outside of the County department who the County works collaborative with and who will either be impacted or has need to know knowledge of changes



Functional

Section 3.3 of the DED

- 3.3.1 Current County Business Processes
- 3.3.2 Training
- 3.3.3 Interfaces
- 3.3.4 County-Specific Reports
- 3.3.5 Security Profiles
- 3.3.6 Resource Databank



Current County Business Processes

Section 3.3.1 of the DED

- Identify the high-level current business functions and processes that will be directly and indirectly impacted by the implementation of the C-IV System
- Provides a baseline for the “as is” and “to be” models to be documented by the Implementation Vendor



Training

Section 3.3.2 of the DED

- Identify staff and training needs
- System training identifies staff and their corresponding training courses
 - Information on C-IV training courses (Attachment 6 of the RFP)
 - Information on Migration County staff positions by role and office (Attachment 7 of the RFP)
- Future Tasks
 - Program cross training identifies changes to current roles and responsibilities in administering benefits
 - Policy and Procedure training identifies those processes that were developed to support the current system and business that will no longer be needed or changed to support the C-IV System or the new way of conducting business



Interfaces

Section 3.3.3 of the DED

- Identify and collect current county-specific interfaces and contact information



County-Specific Reports

Section 3.3.4 of the DED

- Identify and collect county-specific reports and Ad Hoc Reports
- Identify the report producer and report user
- Review the frequency of use
- Prioritize
- Outcomes:
 - Ensures data used by the departments for business decisions, reporting and statistical information will continue to be available to Counties
 - An exercise in identifying county-specific reports that are no longer required and/or new data the C-IV System will produce



Security Profiles

Section 3.3.5 of the DED

- Prepare for the new security profiles in the C-IV System
- Identify, review, confirm and update current security profiles
- Identify county points of contact
- Outcome is to ensure appropriate and adequate security profiles will be in place for the implementation of the C-IV System



Resource Databank

Section 3.3.6 of the DED

- Review Resources such as Service Provider and Employer data
- Identify county points of contact
- Validate information
- Update, delete or add



Technical

Section 3.4 of the DED

- 3.4.1 Site Information
- 3.4.2 Technical Infrastructure
- 3.4.3 Help Desk



Technical

Section 3.4.1 of the DED – Site Information

- Site contact name and information
- Emergency contact information by site
- Hours of operation

Section 3.4.2 of the DED – Technical Infrastructure

- Technical contact name and information

Section 3.4.3 of the DED – Help Desk

- Help Desk contact name and information
- Hours of operation



Migration County Operations

Section 3.5 of the DED

- 3.5.1 County Business Continuity Plan
- 3.5.2 County Disaster Recovery Plan



County Business Continuity Plan

Section 3.5.1 of the DED

- Review your current County Business Continuity Plan
- Create a County Business Continuity Plan if one does not exist



County Disaster Recovery Plan

Section 3.5.4 of the DED

- Review your current County Disaster Recovery Plan
 - Counties operating POP network models
- Create a County Disaster Recovery Plan if one does not exist



Assumptions, Resources and Deliverable Schedule

Section 4.0 of the DED

- Assumptions

Section 5.0 of the DED

- Resources

Section 6.0 of the DED

- Implementation Readiness Plan Deliverable Schedule



Information Maintenance

Section 7.0 of the DED

Information Maintenance

- County provides the Project a completed Implementation Readiness Plan and also stores their plan in-County
- Project will post each Implementation Readiness Plan to the project website and will provide each plan to the Vendors
- Each Migration County is responsible for ongoing updates
- Implementation Vendor will coordinate with each Migration County on an ongoing basis




Project Management Approval

Section 8.0 of the DED

Project Management Approval


- Formal approval of the Deliverable Expectation Document for the Implementation Readiness Plan



Implementation Readiness Plan DED

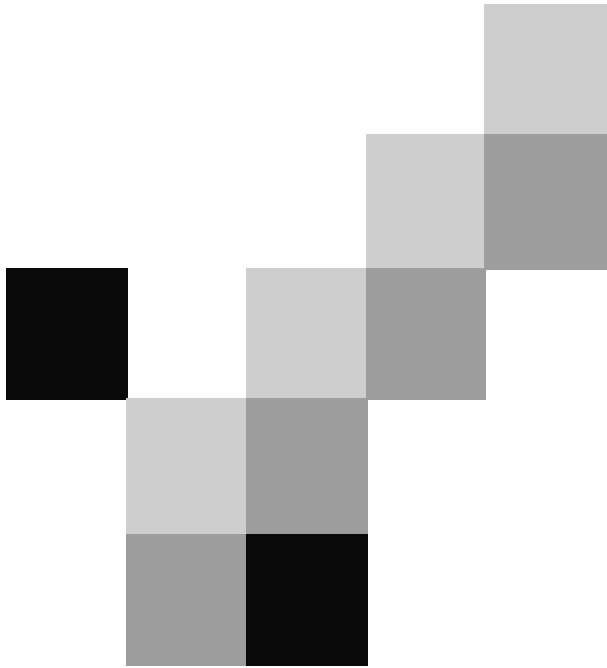
Next Steps

- Other suggestions for components to the Implementation Readiness Plan DED
- Feedback forms due:
 - Northern Region; June 13, 2007
 - Southern Region; June 19, 2007
 - Email to: ljohnson@isawsconsortium.org
- Implementation Readiness Plan DED will be sent to Consortium Management for approval
- Final Implementation Readiness Plan DED provided to the Counties by June 30, 2007



Implementation Readiness Plan DED Summary

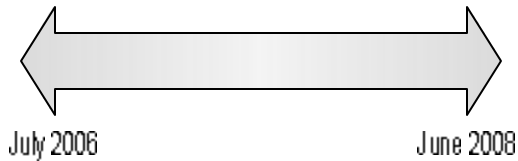
- Implementation Readiness Plan DED is the first step in Readiness Planning
- Readiness Planning assists Counties in planning for the C-IV System



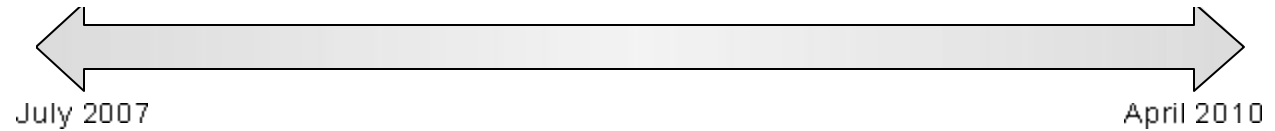
Summary

Migration Schedule Summary

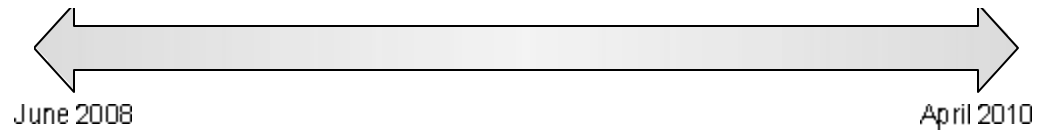
Planning



Development



Implementation





Meeting Wrap-up

- Action Items