

NCCSD Systems Modernization Committee

Systems Modernization States Lessons Learned Webinars

Pre-Planning and Planning – 10/8/2021

Indiana

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Indiana – INvest Project

- IV-D Caseload – 230K+, State administered/County operated
- Infrastructure – Managed by Indiana Office of Technology (IOT)
- Applications – Managed by Agency – Dept of Child Services (DCS), CIO directed move to COTS solution (Salesforce)
- Project – managed by DCS IT Team with some dedicated Child Support Bureau (CSB) staff
- Agency requested an agile approach in RFP – Scrum was proposed in winning bid

- Vendors:
 - Design, Development, Implementation (DDI) – Deloitte
 - Project Mgmt Office (PMO) – netlogx
 - Quality Assurance (QA) – CSG
 - IVV – KPMG

- Timeline: June 2020 start – November 2023 implementation

Pre-Planning

How IN determined roles and responsibilities for QA vendor and IV&V?

- Scope for QA:
 - Goal - agency proactive approach to quality
 - Updated the Governance Manual (PM/SDLC processes)
 - Focus vendor mainly on DDI deliverables, checklists created
 - Key Deliverable - Monthly QA Assessment
 - Team needs to have skills and experience based on DDI scope/approach
 - Vendor onboard prior to pause – some scope/skill sets weren't aligned
- Scope for IV&V – understood this would be reactive
 - OCSE required 6-month reviews, IOT required monthly due to project budget
 - Team needs to have skills and experience based on DDI scope/approach

Pre-Planning

What was IN strategy for ensuring official support for the project?

- Planning Steps:
 - Invited potential vendors in to have modernization discussions
 - Determined high level technology approach, vendors needed, state staff, costs
 - Ensured agency on board with plan (budget, legal, execs)
 - Reviewed plan with OMB/SBA, IDOA, IOT
 - Money is always hurdle – know your ballpark costs (save incentive funding, other streams, cost cutting) – bring solutions
- **Communication is Key** – ensure the staff telling your story can relate it well plus can articulate the risks of not moving forward, use data

Pre-Planning

When did IN begin discussing DDI steps in more detail for preparation of procurement documents? – through vendor discussions/RFP writing

- Implementation/rollout strategies
- Incremental, pilot and regional roll-outs
- Expanded office space - **Virtual project**
- Who provides equipment – vendor provides laptops, state VPN
- Final decisions on tools (HW/SW, methodology, hybrid)
- Staff support and training approach
- **How demonstrate and document data quality issues for potential vendors**
- Data Conversion- (3 mocks, data cleanup)
- Testing-requirements for plans, **introduced User Testing, UAT**

Pre-Planning

How did IN determine operational needs for project?

- Management Team – Contract Managers
- Staff augmentation – utilized state’s managed service provider (MSP)
- Procurement methods – created Procurement Plan and communicated frequently with IDOA (RFP and MSP Project work)
- Resource management plan – know what roles/skills needed, work with HR or MSP if possible, may require training, need to work as team and support each other

Pre-Planning

OCSE Discussion

- When and how IN engaged OCSE – had monthly calls for years
- How IN decided to do formal PAPD - felt necessary to ensure FFP

Pre-Planning

Project Management Office- How IN determined set-up?

- Initially In-House – after pause we assessed Risk – determined state should not shoulder the entire project
- Vendor PMO – scope was to ensure project met time/cost/quality. Manages schedule, Master PMP, requirements traceability, CC, risks.
- Skills needed – need skills to match project approach, tools for metrics/schedule

Pre-Planning

DDI Vendor Scope- How IN determined what “additional things” were needed?

- Pulled out training – DDI writes training material and trains the trainers
- OCM Plan – writes overall plan that state administers

Additional Items Completed

- IT Training – provided agile/scrum training prior to RFP posting, Salesforce Trailhead, Atlassian, and technical learnings
- User Training
- OCM work

Pre-Planning

Use Cases Development

- Wrote Business Process Models, User Stories & Services (High Level)
- Requirements=Features for IN =User Stories by DDI
- Traceability using Jira
 - Certification Guide - Feature - User Story - Test Case