

# Agenda

## Quarterly Stakeholder Forum

**Location:** 2870 Gateway Oaks – Ford (1SW01)

**Time:** 10:00 am to 3:00 pm

**Facilitator(s):** Bill Maile

**Purpose:** To focus on digital services being developed, program policy, tools, testing, implementation, and other related project information.

QSF - Q2 Agenda Items	Speaker(s)	Time
<b>Welcome/Housekeeping</b>	Bill Maile	10:00 – 10:05 am
<b>Quarterly Legislative Briefing</b>	Tony Fortenberry   Penni Clarke   Kevin Gaines	10:05 – 11:00 am
<b>Solution Demo: CALS</b>	Leon Elzie	11:00 – 11:30 am
<b>Solution Demo: Intake</b>	Wendy Christian	11:30 – 12:00 pm
<b>Lunch On Your Own</b>		12:00 – 1:00 pm
<b>CALS:</b> <i>Information Architecture Discussion</i>	Leon Elzie   Liz Lin	1:00 – 1:45 pm
<b>Implementation   Intake:</b> <i>An Example of Implementation Planning in Los Angeles County</i>	Kalani Mertyrus   Wendy Christian   Kellie Figoten   Katie Hastings	1:45 – 3:00 pm



**CWDS** / Child Welfare Digital Services

# Quarterly Legislative Briefing

Tony Fortenberry | Penni Clarke | Kevin Gaines



**CWDS**  
Child Welfare Digital Services

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# **Child Welfare Services – New System Project Quarterly Stakeholder Briefing**

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July 11, 2017

# Agenda

- Overview
  - Project Vision
  - Core Strategies
  - CWDS Solution
  - Budget
- Procurement
- County Perspective
- Product Development
- Challenges & Improvements

Tony Fortenberry

# OVERVIEW

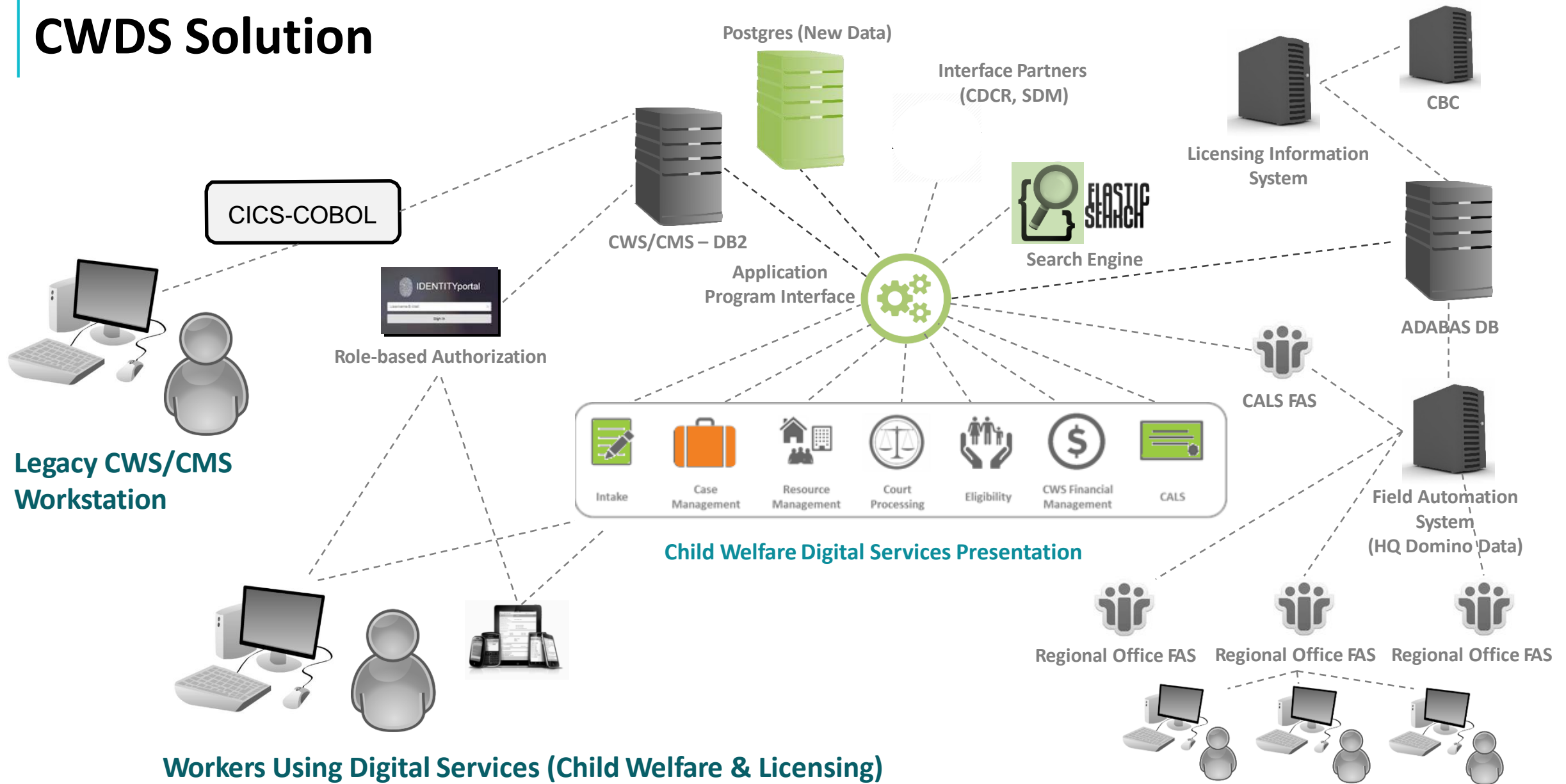
# Project Vision

- CWDS will provide a new **technology platform** and suite of **digital services** to be released incrementally over the next few years.
- The new digital services are being developed as a **collection of web applications**, accessible from both computers and mobile devices.
- The new digital services leverage the principles of **Agile methodology**, **user-centered design**, and **free/open source software (FOSS)**.
- The new digital services will provide an intuitive **user experience** and **new capabilities** not currently provided by legacy systems.
- The new digital services will replace the mainframe-based Child Welfare Services / Case Management System (CWS/CMS) in service since 1997.

# Core Strategies

- User-Centered Design
  - Agile Development Methodology
  - Open Source Technology
  - Modular Procurement
- 
- Iterative Software Releases (Publishing)
  - Emergent Technical Architecture
  - Development and Operations (DevOps) Project Lifecycle

# CWDS Solution





# CWS-NS Budget FY 2016/17

CWS-NS FY 2016-17 Summary Comparison of Budget Authority to Expenditures							
Budget Item	Budget Authority (A)	Expenditures				Unexpended	
		Total Actual YTD (B)	Projected (C)	Total (D) = (B) + (C)	Utilization Rate (E) = (D)/(A)	Total (F) = (A) - (D)	Utilization Rate (G) = (F)/(A)
Staff (Salaries and Benefits)	\$ 7,275,117	\$ 4,531,169	\$ 380,567	\$ 4,911,736	67.51%	\$ 2,363,381	32.49%
Hardware Purchase	\$ -	\$ -	\$ -	\$ -	0.00%	\$ -	0.00%
Software Purchase/License	\$ 874,000	\$ 797,060	\$ 291,644	\$ 1,088,704	124.57%	\$ (214,704)	-24.57%
Telecommunications	\$ 2,000	\$ 90,095	\$ -	\$ 90,095	4504.75%	\$ (88,095)	-4404.75%
Contract Services	\$ 27,462,568	\$ 10,492,213	\$ 4,244,765	\$ 14,736,978	53.66%	\$ 12,725,590	46.34%
Data Center Services	\$ 1,153,516	\$ 368,965	\$ 48,038	\$ 417,003	36.15%	\$ 736,513	63.85%
Agency Facilities	\$ 3,754,545	\$ 1,224,991	\$ 1,834,083	\$ 3,059,074	81.48%	\$ 695,471	18.52%
Other	\$ 17,933,121	\$ 2,564,397	\$ 8,564,614	\$ 11,129,011	62.06%	\$ 6,804,110	37.94%
<b>Total</b>	<b>\$ 58,454,867</b>	<b>\$ 20,068,890</b>	<b>\$ 15,363,711</b>	<b>\$ 35,432,601</b>	<b>60.62%</b>	<b>\$ 23,022,266</b>	<b>39.38%</b>

Project FY 2016-17 Month to Month Cumulative Display Budget Expended													
	Budget	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Project (\$)	\$ 58,454,867	\$ 997,488	\$ 2,187,471	\$ 3,593,548	\$ 5,324,082	\$ 7,029,270	\$ 8,944,706	\$ 11,124,519	\$ 13,617,532	\$ 16,378,416	\$ 18,580,955	\$ 20,937,968	\$ -
Project (%)		1.71%	3.74%	6.15%	9.11%	12.03%	15.30%	19.03%	23.30%	28.02%	31.79%	35.82%	0.00%

# CWS-NS Budget FY 2017/18

CWS-NS FY 2017-18 Budget			
Budget Item	Baseline Budget (A)	FY 2017-18 BCP/ BL Adjustments (B)	FY 2017-18 Budget (C) = (A) + (B)
Staff (Salaries and Benefits)	\$ 7,190,117	\$ 5,881,810	\$ 13,071,927
Hardware Purchase	\$ -		\$ -
Software Purchase/License	\$ 874,000	\$ (607,000)	\$ 267,000
Telecommunications	\$ -	\$ -	\$ -
Contract Services	\$ 26,060,000	\$ 58,476,931	\$ 84,536,931
Data Center Services	\$ 1,153,516	\$ 271,000	\$ 1,424,516
Agency Facilities	\$ 1,686,545	\$ (352,000)	\$ 1,334,545
Other	\$ 21,392,690	\$ 56,638,542	\$ 78,031,232
<b>Total</b>	<b>\$ 58,356,868</b>	<b>\$ 120,309,283</b>	<b>\$ 178,666,151</b>

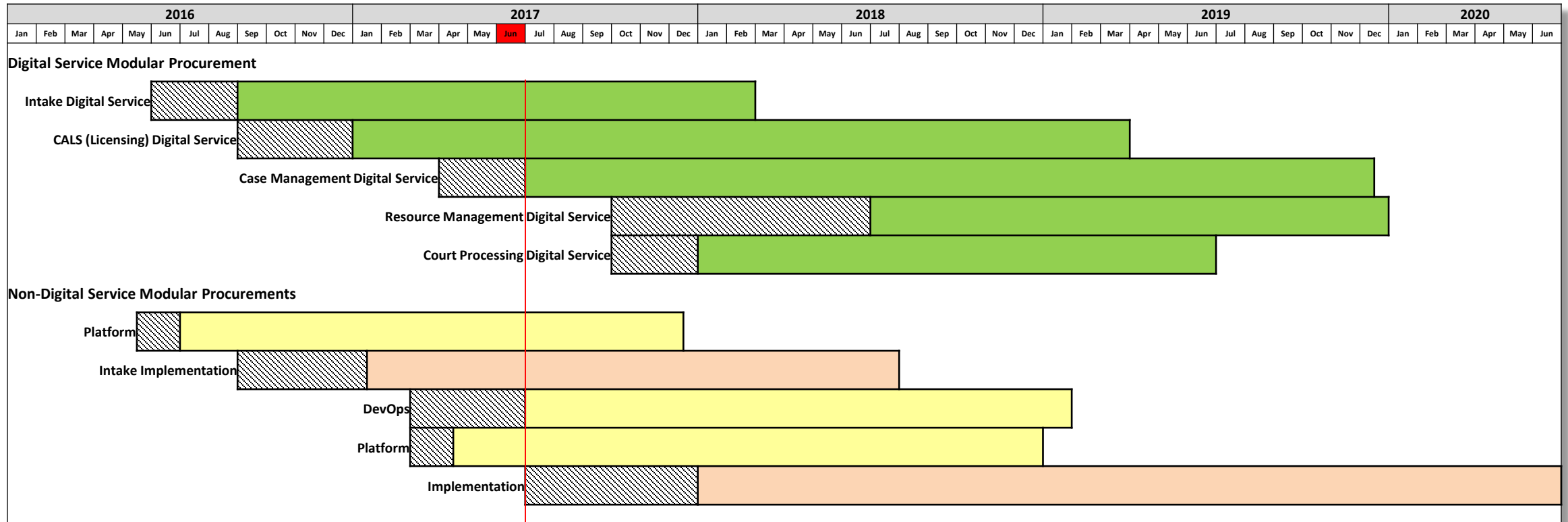
Tony Fortenberry

# PROCUREMENT

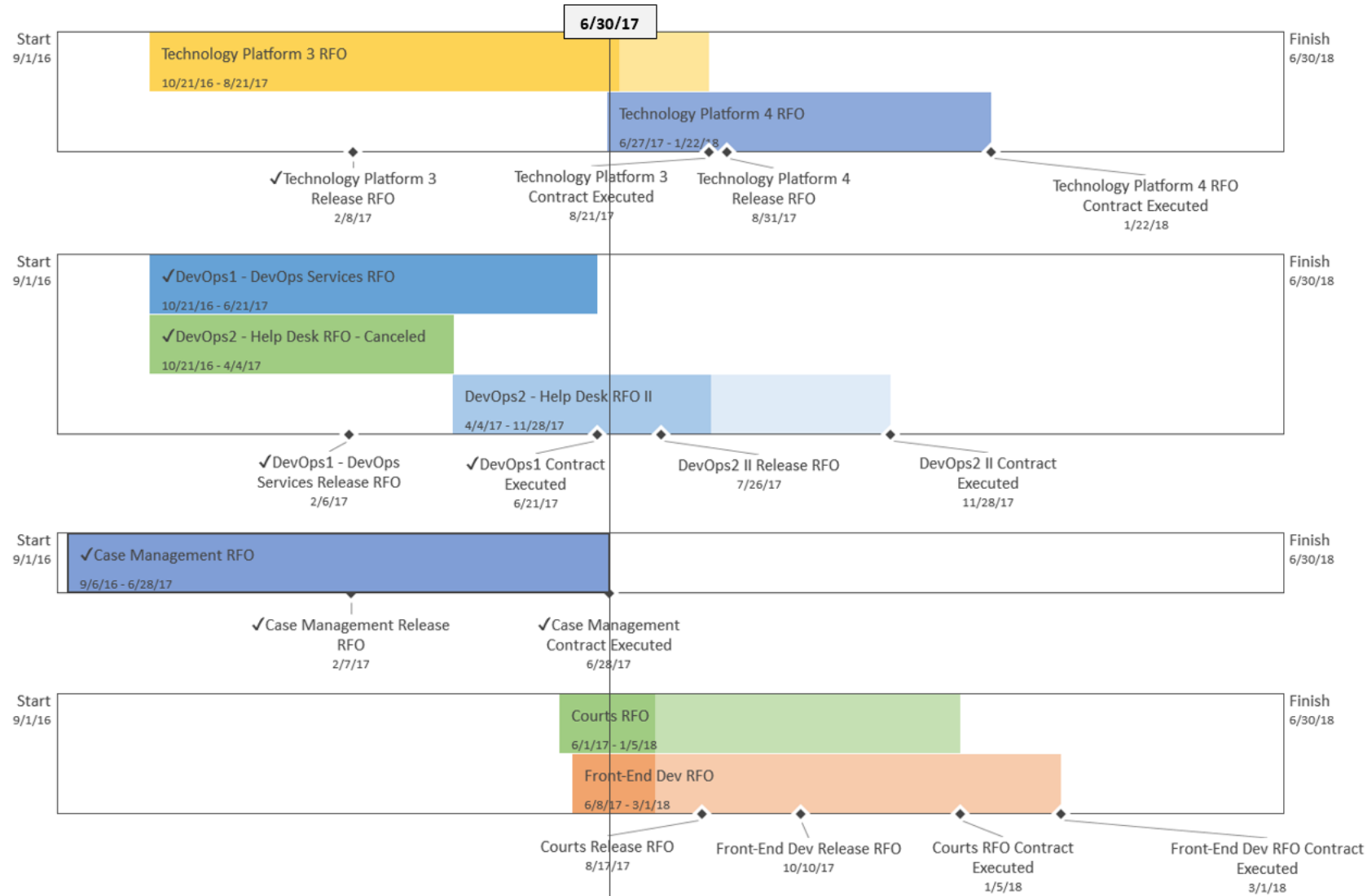
# Procurement Summary

CWDS Procurement Initiatives	Contract Execution	Award To
Technology Platform 1 (API)	Jun-16	Taborda Solutions
Intake (Digital Service)	Aug-16	Case Commons
Business Rules Extraction - CALS	Nov-16	Xfusion Technologies
Implementation Services 1 (Intake/Strategy)	Jan-17	OnCore Consulting
CALS (Licensing) (Digital Service)	Jan-17	Cambria Solutions
Data Project Manager	Feb-17	Natoma Technologies
Technology Platform 2	Apr-17	EngagePoint
Case Management 1 (Digital Service)	Jun-17	Cambria Solutions
Case Management 2 (Digital Service)	Jun-17	Accenture
DevOps Engineering	Jun-17	Civic Actions
Technology Platform 3	Aug-17	
Agile Coach 2	Oct-17	
Service Desk	Nov-17	
Eng & Tech Mgmt Services (Digital Service)	Nov-17	
Courts (Digital Service)	Jan-18	
Technology Platform 4	Jan-18	
Implementation Services 2 (Implementation)	Jan-18	
Implementation Services 3 (OCM)	Jan-18	
Implementation Services 4 (Training Dev)	Feb-18	
Implementation Services 5 (Training Delivery)	Mar-18	
Resource Management (Digital Service)	Jul-18	

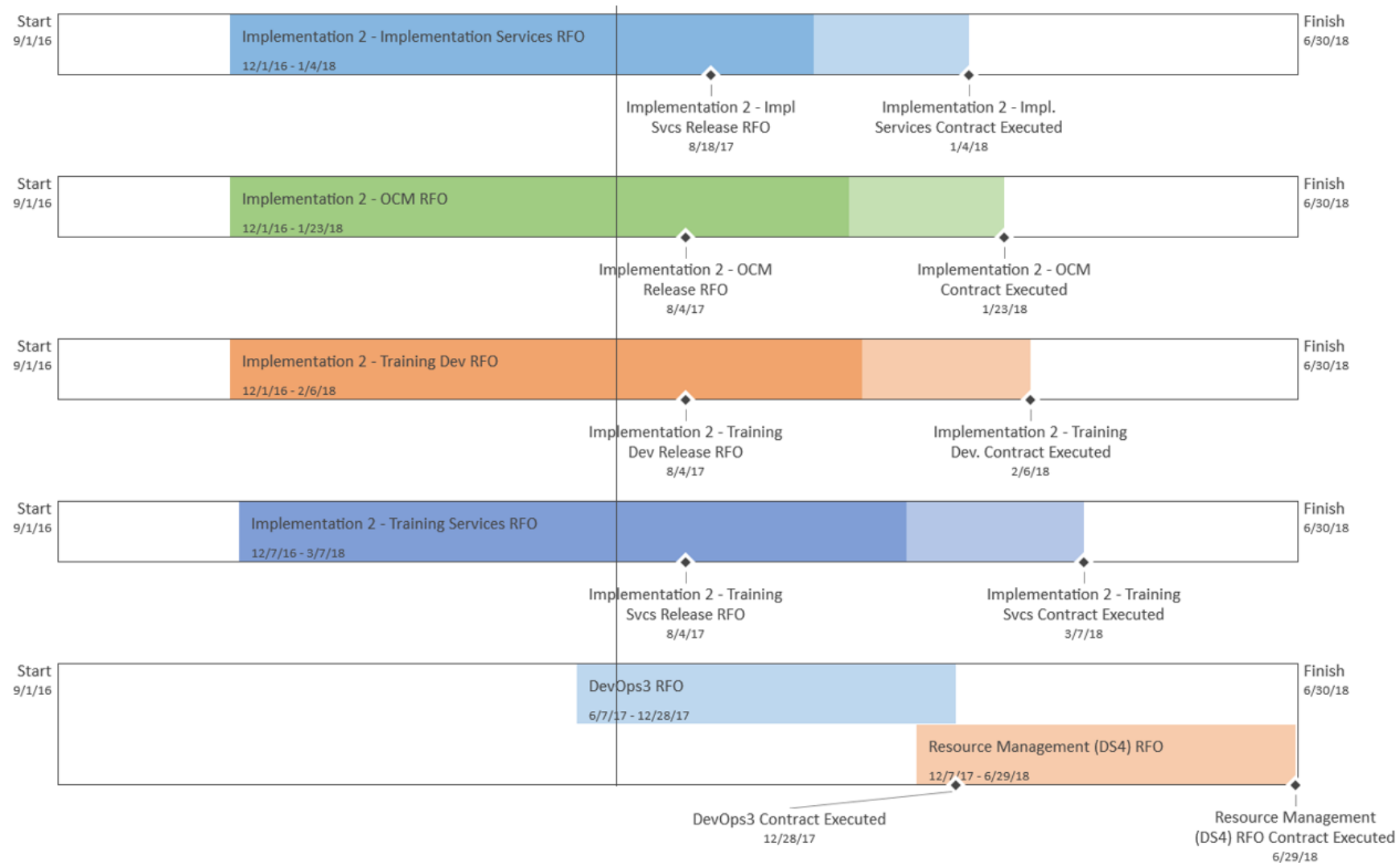
# Contract Roadmap



# Procurement Timeline (1 of 2)



# Procurement Timeline (2 of 2)



Penni Clarke

# COUNTY PERSPECTIVE



Kevin Gaines

# PRODUCT DEVELOPMENT

# Digital Services

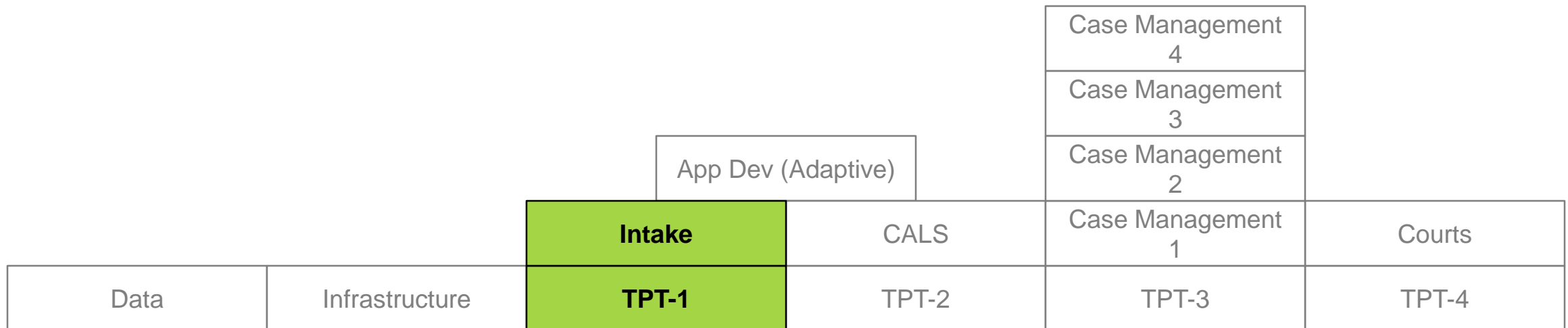
- CWDS Web (*Development*)
- CWDS Technology Platform (*Development*)
- CWDS Infrastructure (*Development*)

Digital Services

- Intake (*Development*)
  - Certification, Approval and Licensing Services (CALS) (*Development*)
  - Case Management (*Development*)
  - Court Processing (*Procurement*)
  - Eligibility
  - Resource Management
  - Financial Management
  - Administration
- Implementation Support Services (*Active*)

# Product Development: Critical Mass *(1 of 2)*

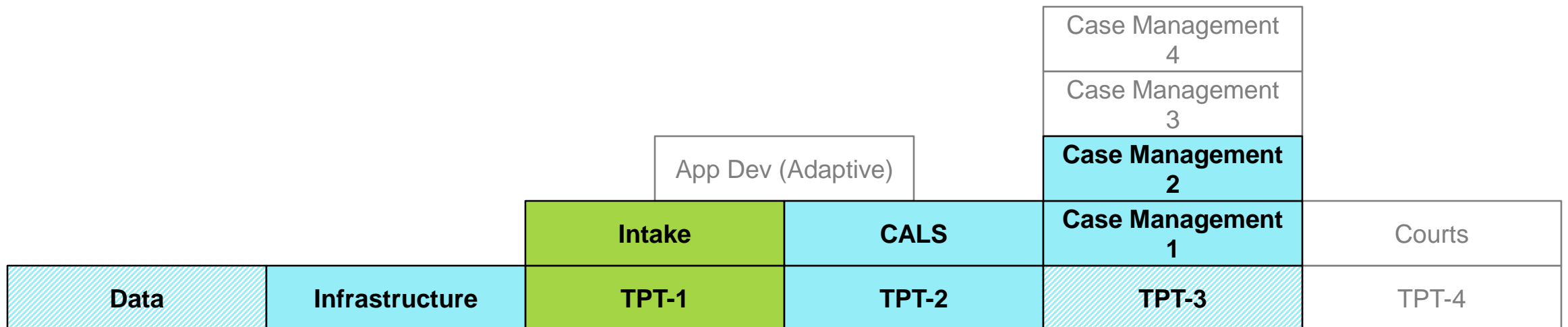
2016



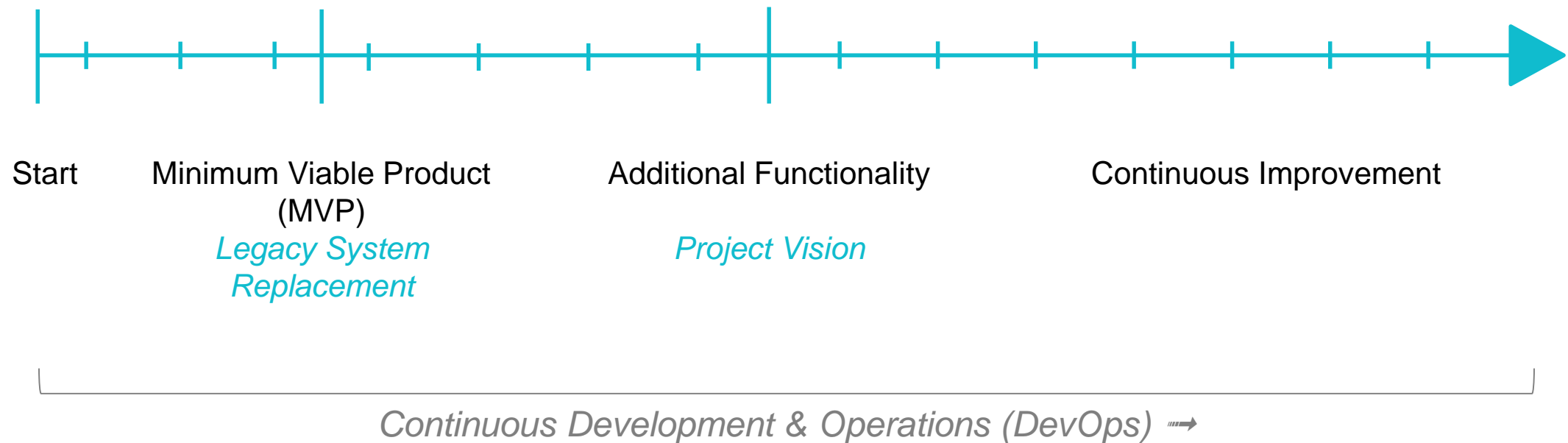
# Product Development: Critical Mass *(2 of 2)*



- 2016 = 2 contractor teams
- 2017 = 9 contractor teams
- *Most 2017 teams awarded within the last 90 days*



# Iterative Product Development



Kevin Gaines

# CHALLENGES & IMPROVEMENTS

# Challenges

## ■ Procurement Timeline

- ❑ Continuing to Streamline/Accelerate Procurement Process
- ❑ RFO flow has improved, but timelines remain challenging
- ❑ Working in partnership with OSI and CDT to continually improve
- ❑ ADPQ expanded to include 24 vendors

## ■ Slow Project Ramp-up

- ❑ Intake application development slower than anticipated
- ❑ Delays in developing infrastructure with limited staff

## ■ Maturity of technical environments still in progress

- ❑ QA / code analysis tools
- ❑ Consistent identification of technical debt
- ❑ Quality and conciseness of stories in development backlogs

## ■ Recruitment / Staffing

- ❑ Attracting strong talent to public service
- ❑ Long hiring lifecycle
- ❑ Compensation below market
- ❑ Agility in changing staff positions as needs evolve

# Improvements

- Organizational Tuning
  - Unify all aspects of product lifecycle under one leader (Product Director)
    - Product Strategy, Research, & Design
    - Product Development
    - Product Operations
  - Establish technology leadership positions (Development Chief, Development Advisor)
  - Incoming Data and Security teams
- Agile Maturity Assessment
- New development and Agile process management tools (JIRA)
- Improved communication & relations with County stakeholders
  - Information roadshow
  - Ensure consistent content across all communication vectors
- Legacy CWS/CMS team support for digital services development (testing, discovery)



# QUESTIONS

# Solution Demo: CALS

Leon Elzie

# CALS Solutions Demo

## Certification, Approval and Licensing Services

Quarterly Stakeholder Forum

July 11, 2017



**CWDS** / Child Welfare Digital Services

# Agenda

- Product Increment (PI) 3 Goals
- Where we are now / What is next
- Present: Solutions Demo
- Roadmap: A Look Ahead

# Goals

# CALS Value Proposition

*Why are we building this service?*



## Child Welfare Goals

## Impact of our service

## Features to deliver value

- Child Safety and Welfare

- Enforced standards of quality to ensure placement facilities are safe for children
- Easier for RFA workers to assist applicants in creating good homes for children

- Home and facility profiles that display compliance history at a glance
- Track RFA progress towards decision within 90 days

- Workload Management

- Less time fighting the tool and more time for the social work

- Status-tracking of RFA Applications
- Creation of facilities within CWS/CMS

- Improve Data Quality

- Reduce the duplication of data entry across reports and modules









- Single entry of applicant information that is reused throughout RFA forms



**Where are we now?**  
**What is next?**



# Facility Profile

CALS JOURNEY	 SEARCH FOR FACILITY	 SEARCH RESULTS	 FACILITY PROFILE	 INFORMATION ARCHITECTURE
FEATURES	<ul style="list-style-type: none"><li>• Search by:<ul style="list-style-type: none"><li>○ Facility Address</li><li>○ Assigned LPA</li><li>○ Facility Approval Number</li><li>○ Approving Agency</li><li>○ Facility Name</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Search Results as Determined by County/State SMEs</li><li>• Display of Search Results</li></ul>	<ul style="list-style-type: none"><li>• Identification of Facility using Key Indicators</li><li>• View Children placed in Facility</li><li>• Complaint History</li></ul>	<ul style="list-style-type: none"><li>• Integration of common business functionality<ul style="list-style-type: none"><li>○ Organization</li><li>○ Labeling</li><li>○ Navigation</li><li>○ Search</li></ul></li></ul>
STATUS	 COMPLETE	 COMPLETE	 IN DEVELOPMENT	 IN DESIGN

# RFA Application



## CREATE RFA APPLICATION



## APPLICATION SEARCH



## PRINT



## CREATE FACILITIES

### CALS JOURNEY

### FEATURES

- Create/Edit RFA Application
  - Resource Family Application
  - Criminal Records Statement
  - RFA Confidential
- Display of Search Results

- Determine Search Criteria
- Determine Search Results
- Display of Search Results

- AS IS Print of RFA Application

- Create Facility in CWS/CMS
- Create Facility from within RFA Application

### STATUS



IN DESIGN



IN DEVELOPMENT



IN RESEARCH



IN RESEARCH



IN RESEARCH



IN DEVELOPMENT

# Demo

What's coming next sprint  
(or two or three )?

# Product Increment (PI) 3

## *Sprint 3.4*

- ☐ Create Facility-CWS/CMS
- ☐ Search for Application
- ☐ RFA01 A
  - Foster Care/Adoption History
  - More About Applicant
  - Minor Children
- ☐ RFA 01B & 01C-Design

## *Sprint 3.5*

- ☐ Create Facility-cont.
- ☐ Search for Application-cont.
- ☐ RFA01 A
  - Application History
  - Child Desired
  - References
  - Employment

## *Sprint 3.6*

- ☐ RFA01 A
  - Declaration
  - Relationships
- ☐ RFA 02 & 03-Design
- ☐ RFA Data Validation
- ☐ Search Facility-cont.
- ☐ RFA01 B & C

07/14 - 07/27

07/28 - 08/09

08/10 - 08/23

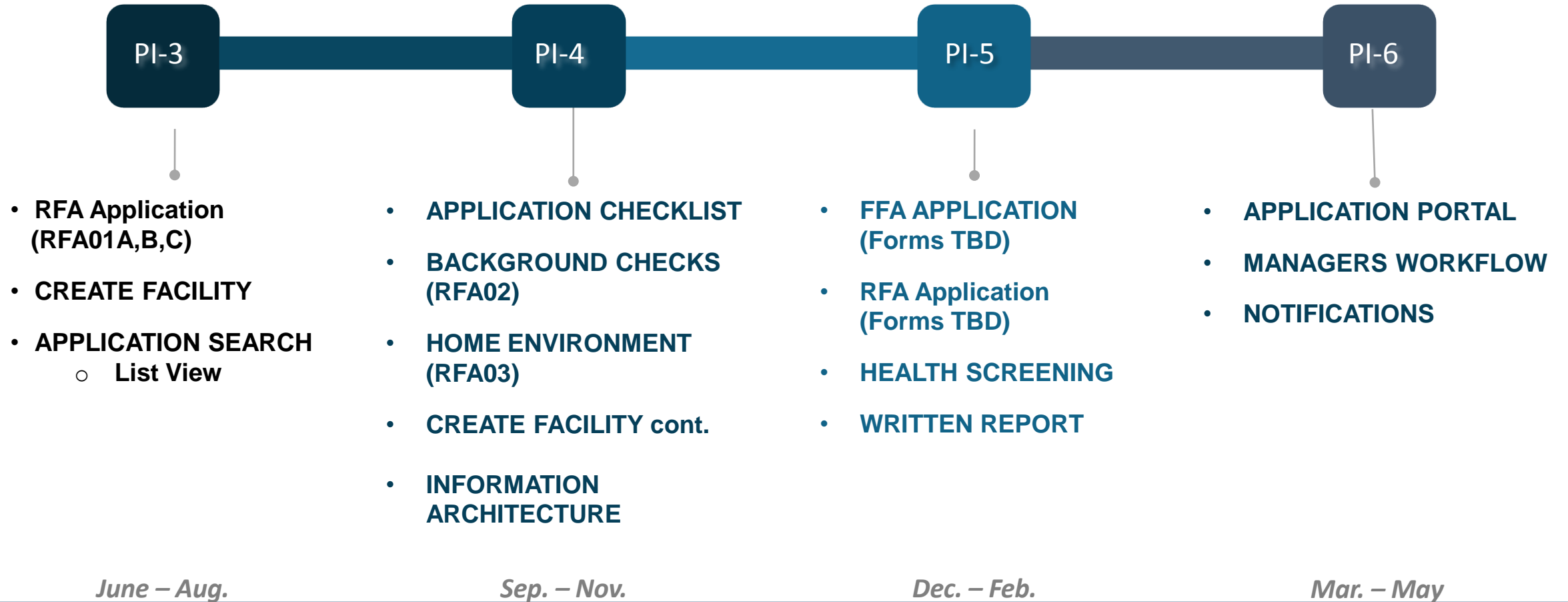
# The Future

Research, design & product roadmap

# Way Into The Future

# Product Increment (PI)

## PI-3 / PI-6



- Resource Family Approval (RFA)
- Foster Family Agency (FFA)



**More About CALS**

# Important Links

## **CALS Digital Service**

- GitHub Wiki: <https://github.com/ca-cwds/CALS/wiki>
- GitHub Repository: <https://github.com/ca-cwds/CALS>

## **CALS API**

- GitHub Wiki: <https://github.com/ca-cwds/cals-api/wiki>
- GitHub Repository: <https://github.com/ca-cwds/cals-api>

## **Shared resources**

- CALS SharePoint (OSI email required): [Link](#)
- CALS Shared Google Drive ([request access](#))

**Thank You**

# Solution Demo: Intake

Wendy Christian

# Intake Solutions Demo

Quarterly Stakeholder Forum

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# The Scope of Intake

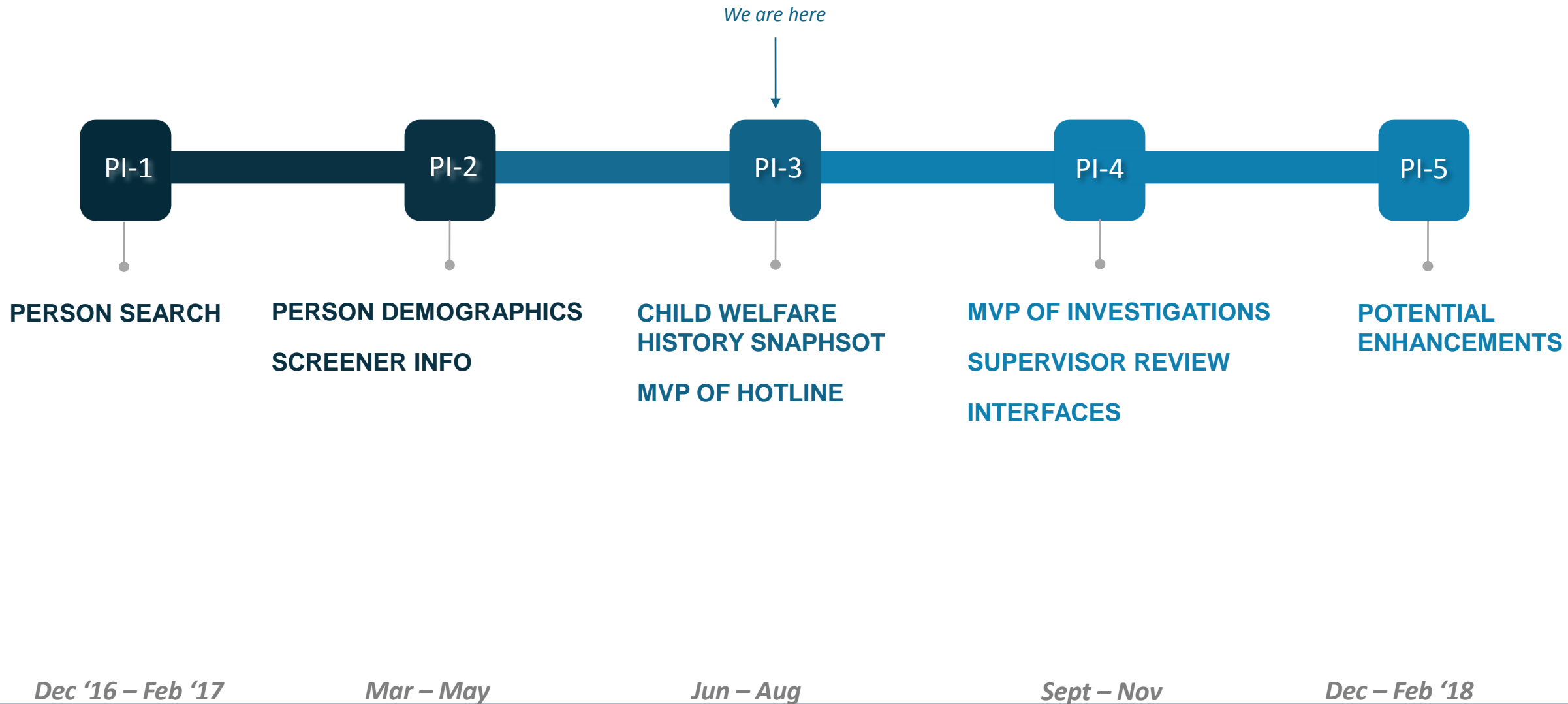
## Emergency Response

Hotline



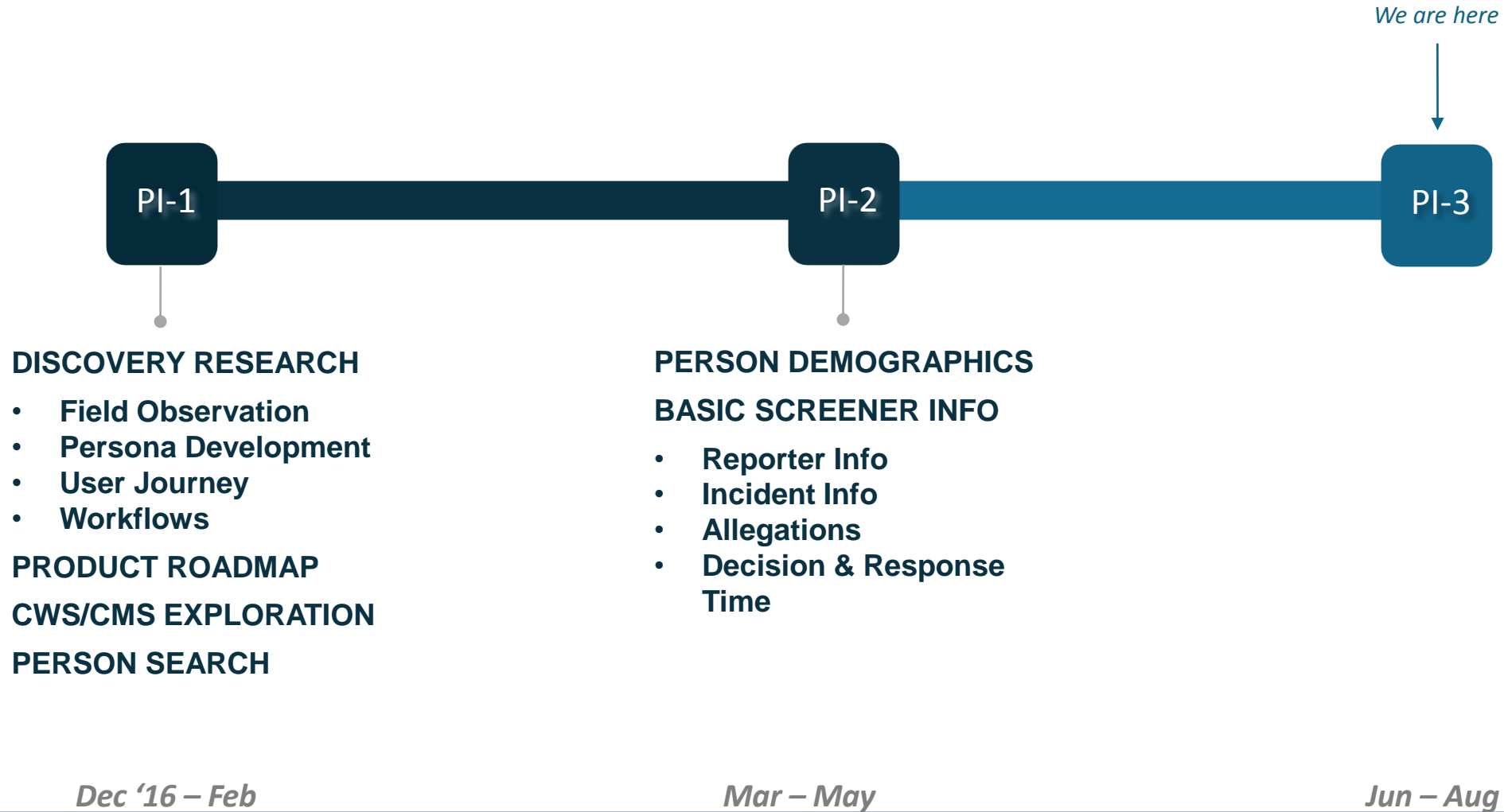
Investigation





- Minimum Viable Product (MVP) is the smallest increment of business parity for a complete workflow

# The past

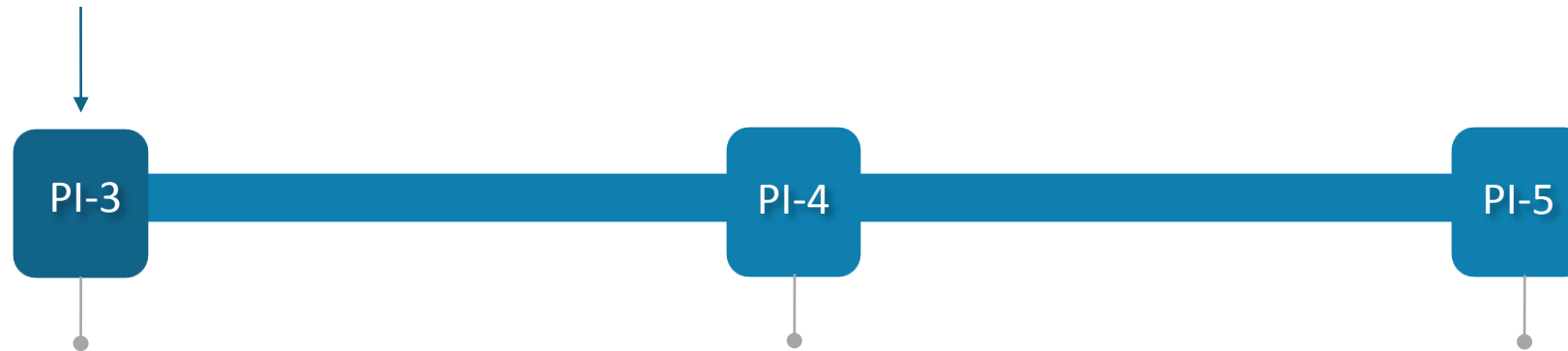


- Minimum Viable Product (MVP) is the smallest increment of business parity for a complete workflow



# The present and future

*We are here*



## CHILD WELFARE HISTORY SNAPHSOT

### MVP OF HOTLINE

### SAVE DATA TO CWS/CMS

### USABILITY TESTING

### DISCOVERY RESEARCH

- Investigations

## MVP OF INVESTIGATIONS

- Contacts
- Disposition
- Outcomes

### SUPERVISOR REVIEW

### INTERFACES

- SDM Tool
- Smarty Streets

## POTENTIAL ENHANCEMENTS

- Genogram
- Timeline of child welfare history
- Improved search accuracy
- Duplicate reduction
- Criminal history integration
- Mental health integration
- etc

*Jun – Aug*

*Sept – Nov*

*Dec – Feb '18*

- Minimum Viable Product (MVP)
- Structured Decision Making (SDM)

# Demos

# Lunch

12:00-1:00 pm | Please join us after lunch using the same WebEx and access code.

# CALS

Leon Elzie | Liz Lin

# CALS

# Design & Research Updates

Quarterly Forum  
July 11, 2017



CWDS / Child Welfare Digital Services

# Information Architecture

# IA

- What is IA
- How it relates to us
- Where we are right now

# What is it?

*“Information architecture focuses on organizing, structuring, and labeling content in an effective and sustainable way. The goal is to help users find information and complete tasks. ”*

- usability.gov







# How does it relate to us ?



# How does it relate to us ?

**Organization Schemes and Structures** – *How you categorize and structure information*

**Labeling Systems** – *How you represent information*

**Navigation Systems** – *How users browse or move through information*

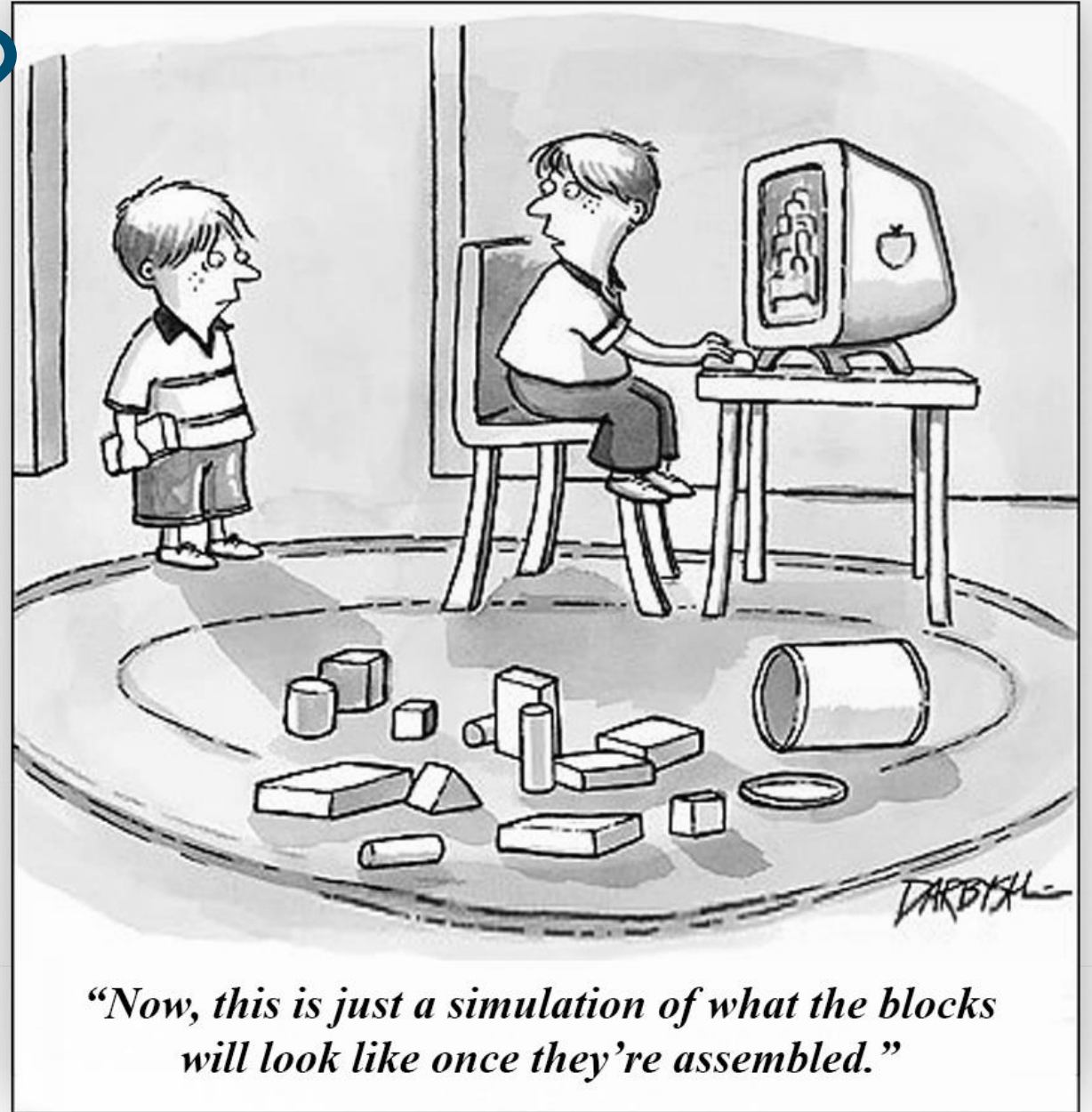
**Search Systems** – *How users look for information*



- Lou Rosenfeld and Peter Morville in their book, *Information Architecture for the World Wide Web*



# Where are we?



# Open Discussion

**Thank You**

# Implementation | Intake

Kalani Mertyrus | Wendy Christian | Kellie Figoten | Katie Hastings

# Implementation Briefing

Quarterly Stakeholder Forum  
July 2017



**CWDS** / Child Welfare Digital Services



# Agenda

- Introductions
- Implementation: The Big Picture
- An Example of Implementation Planning in Los Angeles County
- Next Steps

# Introductions

Today's speakers

# Greetings

## **Speakers for today's presentation**

- Kalani M. – Service Manager for the Implementation Team
- Wendy C. – Service Manager for the Intake Team
- Kellie F. – Los Angeles County Intake Digital Service Lead
- Katie H. – Project Implementation Lead for Los Angeles

# Implementation: The Big Picture

Elements of Implementation

# Implementation Core Elements



## IMPLEMENTATION



## ORGANIZATIONAL CHANGE MANAGEMENT (OCM)



## TRAINING

### Foundational Components

- Org Pre-Kickoff and Kickoff
- Org Implementation Schedule
- Go Live Readiness Checklist
- Cutover Checklist
- Statewide Readiness Dashboard
- Go Live Support Plan
- Contingency Plan

- As-Is Process Models
- To-Be Process Models
- Gap Analysis / Impact Matrix
- Change Readiness Plan
- OCM Training

- Training Curriculum
- Training Materials
- User Manuals (Job Aids)
- TTT Materials

### Key Activities

- Provide Org Imp Support (pre & post Go Live)

- Provide Support to Imp. Leads

- Prepare Training Logistics and Schedule TTT Facilities
- Deliver & Evaluate TTT

# Implementation Supporting Elements



## PRE PLANNING



## RELEASE PREPARATION



## SANDBOX & MISC.

### Foundational Components

- Org Implementation Team Contacts
- Statewide Rollout Plan

- Identify Technical Readiness Items
- Identify Data Cleansing Items
- Identify Interface and/or External System Readiness Items

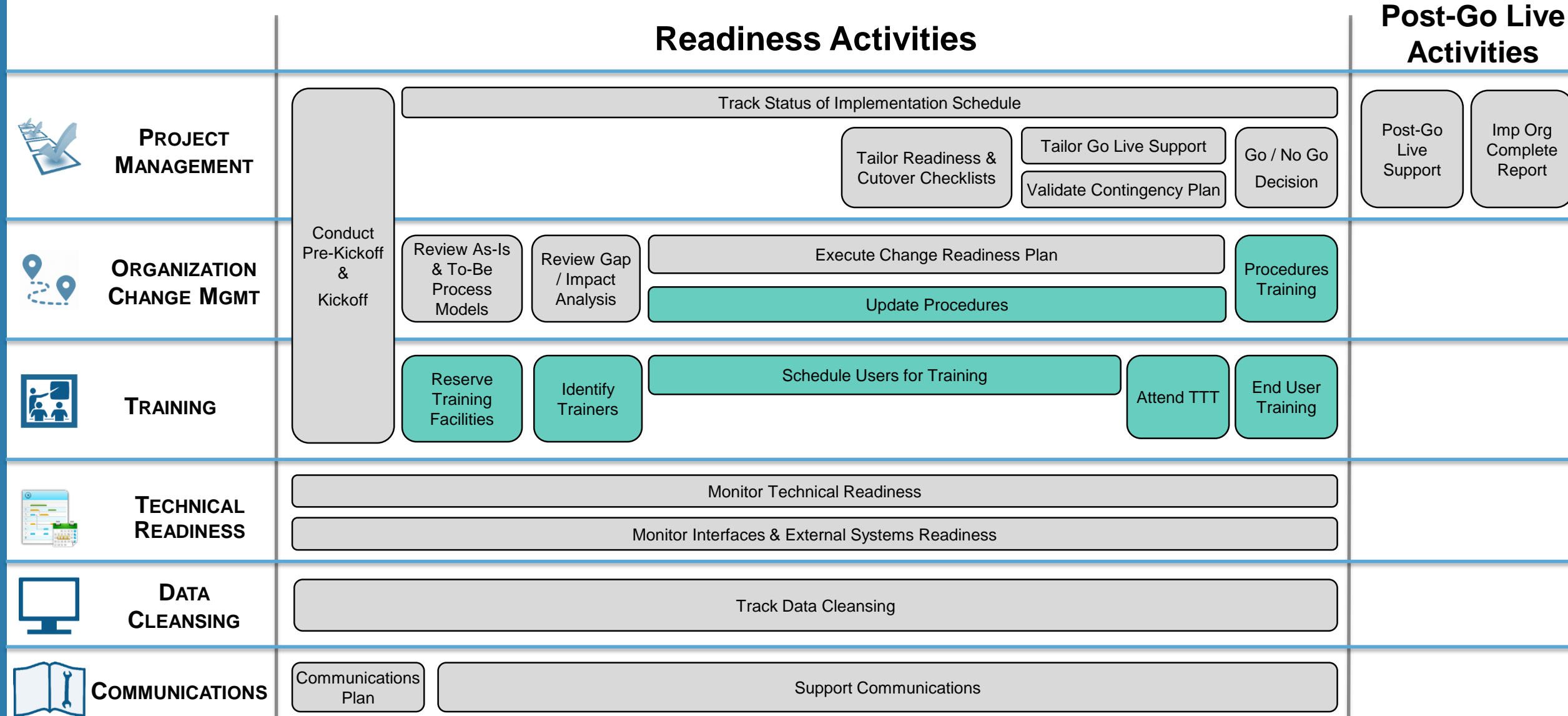
- Preview Env. / Sandbox Job Aids
- Preview Env. / Sandbox Scenarios

### Key Activities

- Bi-Weekly Implementation Calls (Intake)

- Provide Intake QA Support
- Facilitate Intake Core County Calls

# Elements and their Related Activities



JOINT TASKS



ORG ONLY TASKS

# An Example of Implementation Planning in Los Angeles County

Activities undertaken and accomplished



# Los Angeles County Activities

- Pre-Planning for Core Counties
- Planning Readiness and Rollout\*
- Execute Readiness and Rollout



# Los Angeles County Activities

- **Pre-Planning for Core Counties**
- Planning Readiness and Rollout\*
- Execute Readiness and Rollout



## CWS-NS News



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### LATEST NEWS



Sed ut perspiciatis unde  
natus error sit voluptatem  
February 21, 2017 - 12:16 pm



Nemo enim ipsam volupta  
voluptas sit aspernatur aut  
February 17, 2017 - 11:54 am



At vero eos et accusamus  
odio dignissimos ducimus  
February 14, 2017 - 3:27 pm



Nam libero tempore, cum  
nobis est eligendi  
February 10, 2017 - 1:33 pm



### WHO ARE WE?

Greetings! We are the CWS-NS Team here to provide you updates & news about the NEW Child Welfare Services- New System (CWS-NS). We are here to help answer any questions that you may have!

### WHAT IS CWS-NS?

The Child Welfare Services New System (CWS-NS) is a web-based solution that will replace the legacy CWS/CMS that has been in existence since 1997. CWS-NS will provide:

- A new technology platform & suite of digital services to be released incrementally over the next few years.
- The digital services will provide a more intuitive user experience & new capabilities not currently provided by the CWS/CMS, LIS, & FAS legacy systems.

### 8 DIGITAL SERVICES

**INTAKE****CALS****CASE  
MANAGEMENT****COURT  
PROCESSING****RESOURCE  
MANAGEMENT****ELIGIBILITY****FINANCIAL  
MANAGEMENT****ADMINISTRATION**



## CWS-NS News

Search within CWS-NS News website



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## About Us \ Contact Us

### Send Us an e-Mail

12440 Imperial Hwy., Norwalk, CA 90650

Email: [CWSNSTeam@dcfs.lacounty.gov](mailto:CWSNSTeam@dcfs.lacounty.gov)

Name

Email

Subject

Message

Send

## CWS-NS News



### NAVIGATION MENU

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## Frequently Asked Questions



### 1. I have a question/feedback about CWS-NS. Where can I go to provide my question/feedback?

You can reach us by clicking on About Us > Contact Us on the Navigation menu on the left and sending us a message with the form or you can email us directly at [CWSNSTeam@dcfs.lacounty.gov](mailto:CWSNSTeam@dcfs.lacounty.gov).

### 2. How will I be notified about updates regarding CWS-NS?

### 3. When will we start to see the CWS-NS application in our offices?

### 4. What will happen to CWS/CMS?

### 5. How will we be trained on CWS-NS?

# Los Angeles County Activities

- **Pre-Planning for Core Counties**
- Planning Readiness and Rollout\*
- Execute Readiness and Rollout





# Office Analysis

CWS-NS: Roles by Office									
#	Role/Items	Description	Belvedere	Belvedere Annex	CPHL	Compton			
	ER CSW	Emergency response - Initial investigation							
	CS CSW	Continuing Services - primary case manager							
	Vertical CSW	Vertical Caseloads - doing ER and CS in specialized programs							
	DI CSW	Dependency Investigators - secondary investigation							
	DI SCSW	Dependency Investigators Supervisors							
	ER SCSW	Emergency Response							
	CS SCSW	Continuing Services							
	Vertical SCSW	Vertical Caseloads - doing ER and CS in specialized programs							
	ARA	Assistant Regional Admin - manages the supervisors							
	RA	Regional Admin - manages the supervisors							
		Dependency Investigator Assistant							

Hotline = 200  
Users, 1 location

vs.

Investigations =  
917 Users, 22  
locations

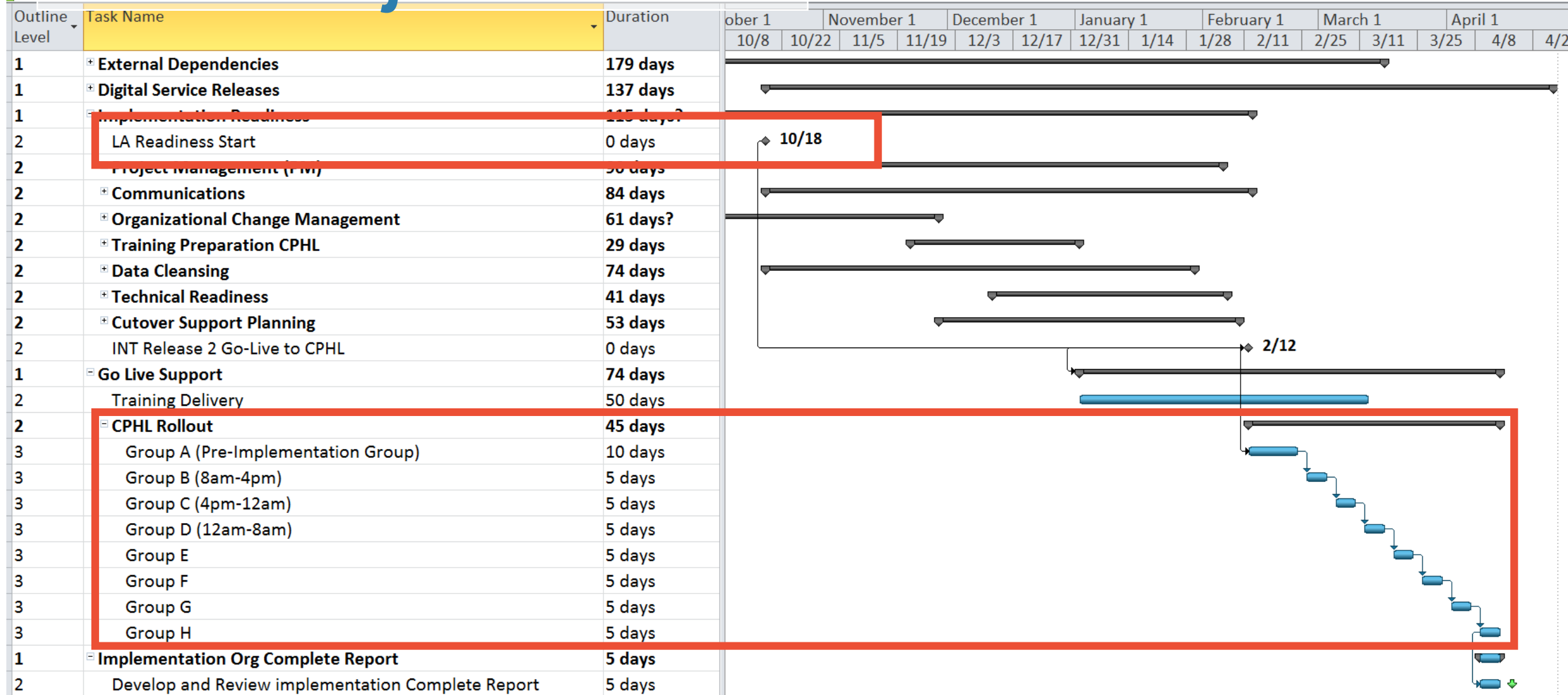
# Los Angeles County Activities

- Pre-Planning for Core Counties
- **Planning Readiness and Rollout\***
- Execute Readiness and Rollout





# LA Project Plan



# Los Angeles County Activities

- Pre-Planning for Core Counties
- Planning Readiness and Rollout\*
- **Execute Readiness and Rollout**



# Next Steps

Short and medium-term activities

# Team Activities

## **Short Term** (immediate)

- All County Communications
  - Regional User Group Meetings
  - Outreach
  - Plan recurring Implementation meetings

## **Medium Term** (within the next 3 months)

- Core County Implementation Activities

# Contact Us

[CWDSImplementation@osi.ca.gov](mailto:CWDSImplementation@osi.ca.gov)

# Questions?

**Thank you for attending!**