Child Welfare Services – New System Project

Quarterly Stakeholder Forum

October 10, 2017

CWDS / Child Welfare Digital Services

Agenda

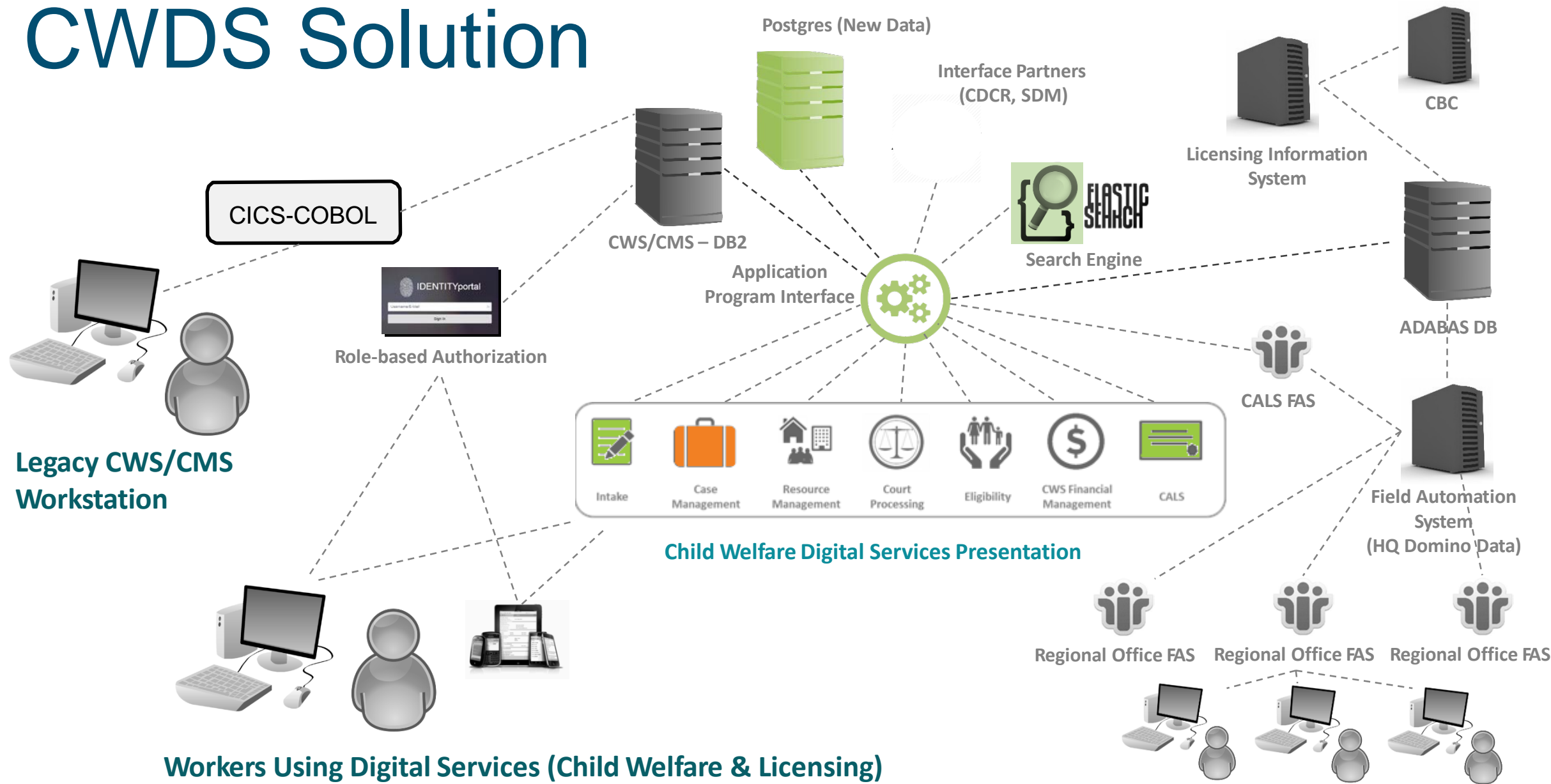| Agenda Item	Lead		Time
Opening Remarks	Cathy Turner Kevin Gaines	Tony Fortenberry	10:00 am – 10:30 am
Panel Discussion Moderated by Bill Maile	Wendy Christian Cindy Vatalaro Richard Bach	Phoebe DeMund Louis Cretaro	10:30 am – 11:30 am
Lunch			11:30 am – 1:00 pm
Intake Demonstration	Wendy Christian		1:00 pm – 1:20 pm
CALS Demonstration	Phoebe DeMund		1:20 pm – 1:40 pm
TPT Presentation	Robb Thompson Greg Hill		1:40 pm – 2:00 pm
Case Management Research & Design Presentation	Cindy Vatalaro	Antoinette Houston	2:00 pm – 2:20 pm
Data Management Presentation	Lynn Jones	Amit Rai	2:20 pm – 2:40 pm
Implementation Presentation	Kalani Mertyris		2:40 pm – 3:00 pm

Overview

Tony Fortenberry

Project Vision

- Child Welfare Digital Services (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

Postgres (New Data)

Interface Partners (CDCR, SDM)

CBC

Licensing Information System

CICS-COBOL

CWS/CMS – DB2

Application Program Interface

Search Engine

ADABAS DB

IDENTITYportal

Role-based Authorization

CALS FAS

Legacy CWS/CMS Workstation

Child Welfare Digital Services Presentation

Intake | Case Management | Resource Management | Court Processing | Eligibility | CWS Financial Management | CALS

Field Automation System (HQ Domino Data)

Regional Office FAS   Regional Office FAS   Regional Office FAS

Workers Using Digital Services (Child Welfare & Licensing)

CWS-NS Budget FY 2017-18

2017-18 CWS-NS Budget/Expenditure Report Summary

OSI Spending Authority Budget Item	Expenditures					Unexpended	
	2017-18 Budget	Actual Expenditures	Projected Expenditures	Total Actuals/ Projections	Expenditure Utilization Rate	Total Unexpended Projection	Unexpended Utilization Rate
Personnel Services	11,883,786	895,468	10,988,318	11,883,786	100.00%	-	0.00%
Other OE&E	3,046,722	34,461	3,012,261	3,046,722	100.00%	-	0.00%
Data Center Services	602,497	24,360	578,137	602,497	100.00%	-	0.00%
Facilities	1,421,345	-	1,421,345	1,421,345	100.00%	-	0.00%
Contract Services	66,442,591	2,799,594	63,642,997	66,442,591	100.00%	-	0.00%
Hardware & Software	2,767,000	343,408	2,423,592	2,767,000	100.00%	-	0.00%
Enterprise Services	4,191,896	698,649	3,493,247	4,191,896	100.00%	-	0.00%
OSI Spending Authority Total	**90,355,837**	**4,795,940**	**85,559,897**	**90,355,837**	**100.00%**	**-**	**0.00%**

CDSS Local Assistance Budget Item	2017-18 Budget	Actual Expenditures	Projected Expenditures	Total Actuals/ Projections	Expenditure Utilization Rate	Total Unexpended Projection	Unexpended Utilization Rate
Contract Services	2,584,820	264,684	2,320,136	2,584,820	100.00%	-	0.00%
Other OE&E	15,234,312	-	15,234,312	15,234,312	100.00%	-	0.00%
County Participation Costs	68,338,542	-	68,338,542	68,338,542	100.00%	-	0.00%
CDSS Local Assistance Total	**86,157,674**	**264,684**	**85,892,990**	**86,157,674**	**100.00%**	**-**	**0.00%**

CDSS State Operations Budget Item	2017-18 Budget	Actual Expenditures	Projected Expenditures	Total Actuals/ Projections	Expenditure Utilization Rate	Total Unexpended Projection	Unexpended Utilization Rate
Personnel Services	1,930,359	-	1,930,359	1,930,359	100.00%	-	0.00%
Facilities	568,000	-	568,000	568,000	100.00%	-	0.00%
Other OE&E	224,497	-	224,497	224,497	100.00%	-	0.00%
CDSS State Operations Total	**2,722,856**	**-**	**2,722,856**	**2,722,856**	**100.00%**	**-**	**0.00%**
CWS-NS Project Total	**179,236,367**	**5,060,624**	**174,175,743**	**179,236,367**	**100.00%**	**-**	**0.00%**

Procurement

Tony Fortenberry

Procurement Summary

CWDS Procurement Initiatives	Contract Execution	Award To
Technology Platform Team 1 (TPT-1)	Jun-16	Taborda Solutions
Intake (Digital Service)	Aug-16	Case Commons
Business Rules Extraction – Certification, Approval, and Licensing Services (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 Team 2 (TPT-2)	Apr-17	EngagePoint
Digital Service - Case Management 1	Jun-17	Cambria Solutions
Digital Service - Case Management 2	Jun-17	Accenture
DevOps 1 - Engineering	Jun-17	Civic Actions
Technology Platform Team 3 (TPT-3)	Oct-17	
Agile Coach 2	Oct-17	
DevOps 2- Service Desk	Oct-17	
Engineering and Technical Management Services	Nov-17	
Technology Platform Team 4 (TPT-4)	Dec-17	
Digital Services – Court Processing	Mar-18	
Front End Development	Mar-18	
Digital Service - Resource Management	Jul-18	
Implementation Services	Sep-18	
Organizational Change Management (OCM) Services	Sep-18	
Training Development Services	Sep-18	
Training Delivery Services	Sep-18	

Contract Roadmap
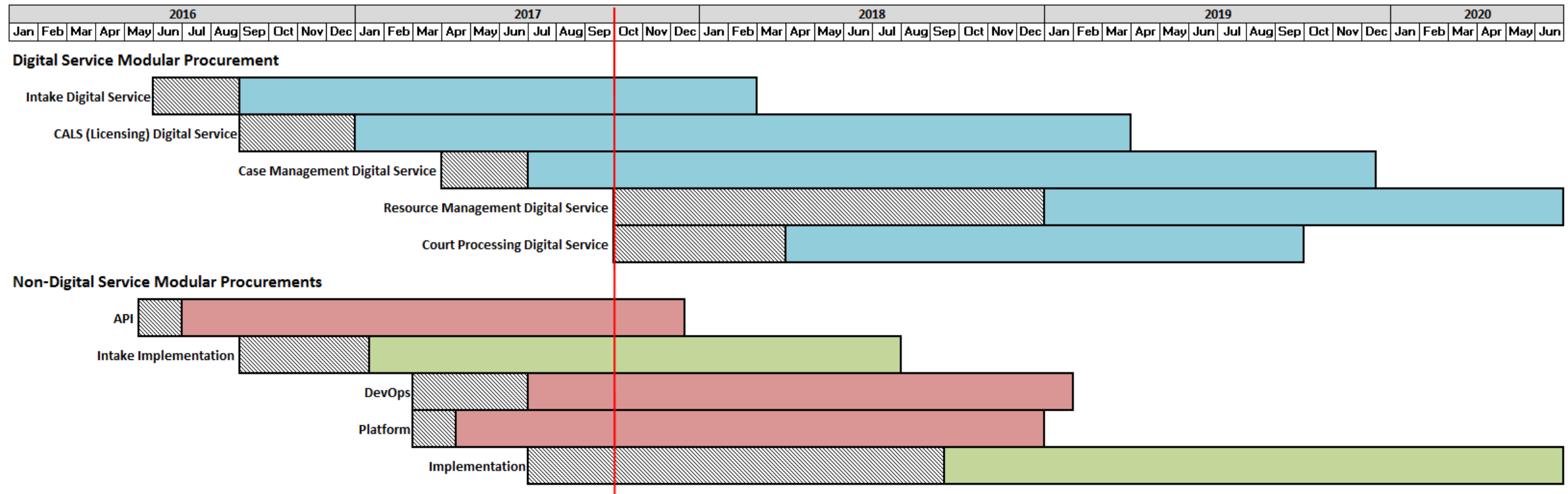
Procurement Status *(1 of 2)*

Digital Service and Digital Service Related Procurements		
Procurement	**Estimated Execution**	**Status**
Technology Platform 3	10/18/2017	Contract is development.
DevOps 2 (Service Desk)	10/25/2017	Vendor has been selected and contract package is being developed.
Technology Platform 4	12/18/2017	RFO released on 8/28/17 and offers are due 9/28/17.
DevOps 3	3/20/2018	RFO is in development by the Project.
Front-End Dev	3/23/2018	RFO package is currently in the Red Folder review process.
Courts Processing	3/28/2018	ACSD is updating RFO package.
CALS Front End Development Team 2	3/30/2018	RFO is in development by the Project.
Implementation 2 (Implementation Services)	9/1/2018	RFO is in development by the Project.
Implementation 2 (Organizational Change Management)	9/1/2018	RFO is in development by the Project.
Implementation 2 (Training Development)	9/1/2018	RFO is in development by the Project.
Implementation 2 (Training Services)	9/1/2018	RFO is in development by the Project.
Resource Management	1/1/2019	Not started

Project Support Consultant Procurements		
Procurement	**Estimated Execution**	**Status**
Engineering & Technology Services	9/20/2017	Contract executed 9/20/17.
CWDS Service Manager	10/16/2017	Waiting for responses from vendors on the RFQ package.
CWDS Product Manager	10/18/2017	Waiting for responses from vendors on the RFQ package.
Agile Coaching II	10/27/2017	Vendor has been selected and contract package is being developed.
CWDA Executive Liaison	1/2/2018	Agency is reviewing the NCB package.
Digital Media Development	4/18/2018	RFO in development.
Data Support Services	4/20/2018	RFO in development.
Data Conversion Services – Team Members	6/13/2018	RFO not started.
Release Training Services	7/17/2018	RFO not started.
Implementation 2 --Implementation Coordination Support Services	9/1/2018	RFO is in development by the Project.
County Consultant Procurements		
Procurement	**Estimated Execution**	**Status**
CALS County Consultant CC#16	10/10/2017	Contract package is with County for review and approval.
Ventura County (CC#21,24,29,34,35)	10/17/2017	Project is working with the county on changes to the contract.
Platform County Consultant CC#25	10/17/2017	Candidate not identified.
Court Processing County Consultant CC#27	12/1/2017	Candidate not identified.
Court Processing County Consultant CC#28	12/1/2017	Candidate not identified.
Case Management County Consultant CC#17	1/1/2018	Candidate not identified.
Case Management County Consultant CC#22	1/1/2018	Candidate not identified.
Case Management County Consultant CC#23	1/1/2018	Candidate not identified.
Resource Management County Consultant CC#26	3/1/2018	Candidate not identified.
Eligibility County Consultant CC#30	4/1/2018	Candidate not identified.
Financial Management County Consultant CC#31	4/1/2018	Candidate not identified.
Financial Management County Consultant CC#32	4/1/2018	Candidate not identified.

Culture of Shared Solutions

Product Development

Kevin Gaines

Digital Services

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

Digital Services

Product Development Teams

Legend:
- 2016 (orange)
- 2017 (blue)
- 2017 planned (hatched)

TPT-1	TPT-2	TPT-3	TPT-4
		Case Management 4	
		Case Management 3	
		Case Management 2	
App Dev (Adaptive)	App Dev (Adaptive)	Case Management 1	Courts
Intake	CALS		
Data / Infrastructure			

Intake Update

- Delivery of Snapshot

- MVP of Hotline

- Interfaces

The Child Welfare History Snapshot
gives users the ability to…

1 …search for people across CWS/CMS from a **single field**

2 …see that person's current contact information and demographics

3 …see an at-a-glance summary of their **combined CWS history**

Additional Benefits

- **Reduce risk** of rolling out software with the new infrastructure with a small, low-risk release

- **Find and address** issues early, based on feedback from real users doing real work

- **Deliver value** right away, without having to wait for the Hotline MVP

In a fraction of the time it currently takes to do the same work in CWS-CMS.

CALS Update

- Scope Review

- Facility Profile

- RFA Forms

CALS

RFA & Facility Application Processing, including Background Clearance

Resource Family/Facility Applicant Orientation and Training

Fieldwork Support for Evaluations, Home Studies and Inspections

Complaint and Incident Processing

Processing for Corrective Remedies and/or Administrative Actions

Reporting, Data Analysis, and Dashboards

Fiscal Management

Case Management Update

- Research and Discovery

- Create a library of reusable code patterns

- Map the current system & prepare to replace CWS/CMS functionality

Research & Prototype

Codesign with our core counties on new Emergency Placement and Family Finding capabilities in support of RFA
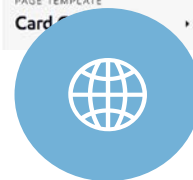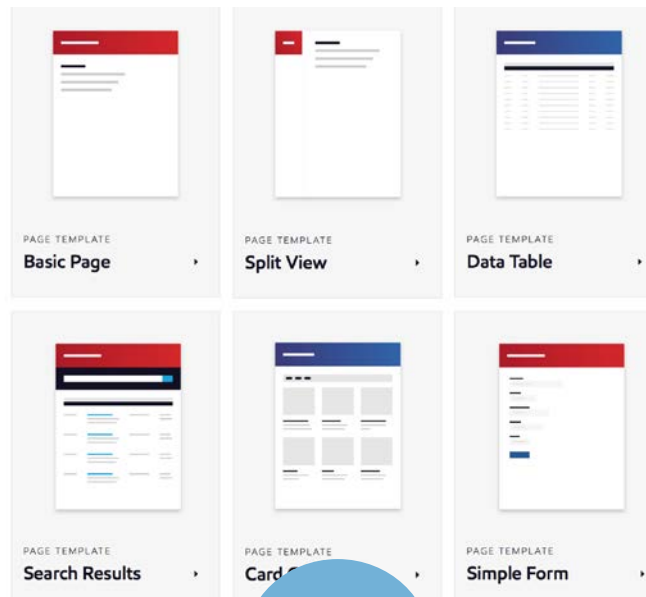
Pattern Library

Create a library of reusable, modular code components so that when we build interface screens they will all have the same look and feel across all digital services.

Legacy Systems Map

Understand data requirements and restrictions in CWS-CMS to ensure front end features support smart back end development once our TPT team joins the project.

Legend:
- Fundamental business processes
- Necessary supporting data & platform work
- Enhancements to existing business processes in CWS-CMS
- Entirely new functionality and data

Timeline columns: DONE | DOING (current PI) | NEAR TERM (to April '18) | LONG TERM

PRACTICE

Intake
- View CWS history ◆1
- Screen Hotline reports ◆2
- Supervisor review of work
- "Enhancements" ???
- Investigate abuse reports ◆3
- Integrate external sources of information
- Prioritize workloads
- Criminal history and status (CDCR) | Child Abuse (CACI) | Mental health (MIS/DSS) | Sex Offender Registry

CALS
- Manage facility info
- Assess and approve placement resources
- Investigate licensee complaints and incidents
- Take corrective actions
- Train resource families
- Support evaluations in the field
- Families apply through portal
- Manage accounts receivable
- [Data, reporting and analytics] ???

Case Management
- INITIAL RESEARCH & DISCOVERY
- Manage & monitor placements
- Manage case and service plans
- Monitor case plans and services ???
- Find emergency placements
- Support permanency (adoptions & reunification)
- Services (Integrated & Specialities Care Plan) ???
- Integrate external sources of information
- Education (CDE) | Welfare data (SAWS) | Medical eligibility (MEDS)
- Integrate Adopt US Kids

Courts
- Integrate CWS
- INITIAL RESEARCH & DISCOVERY
- Integrate LCTS
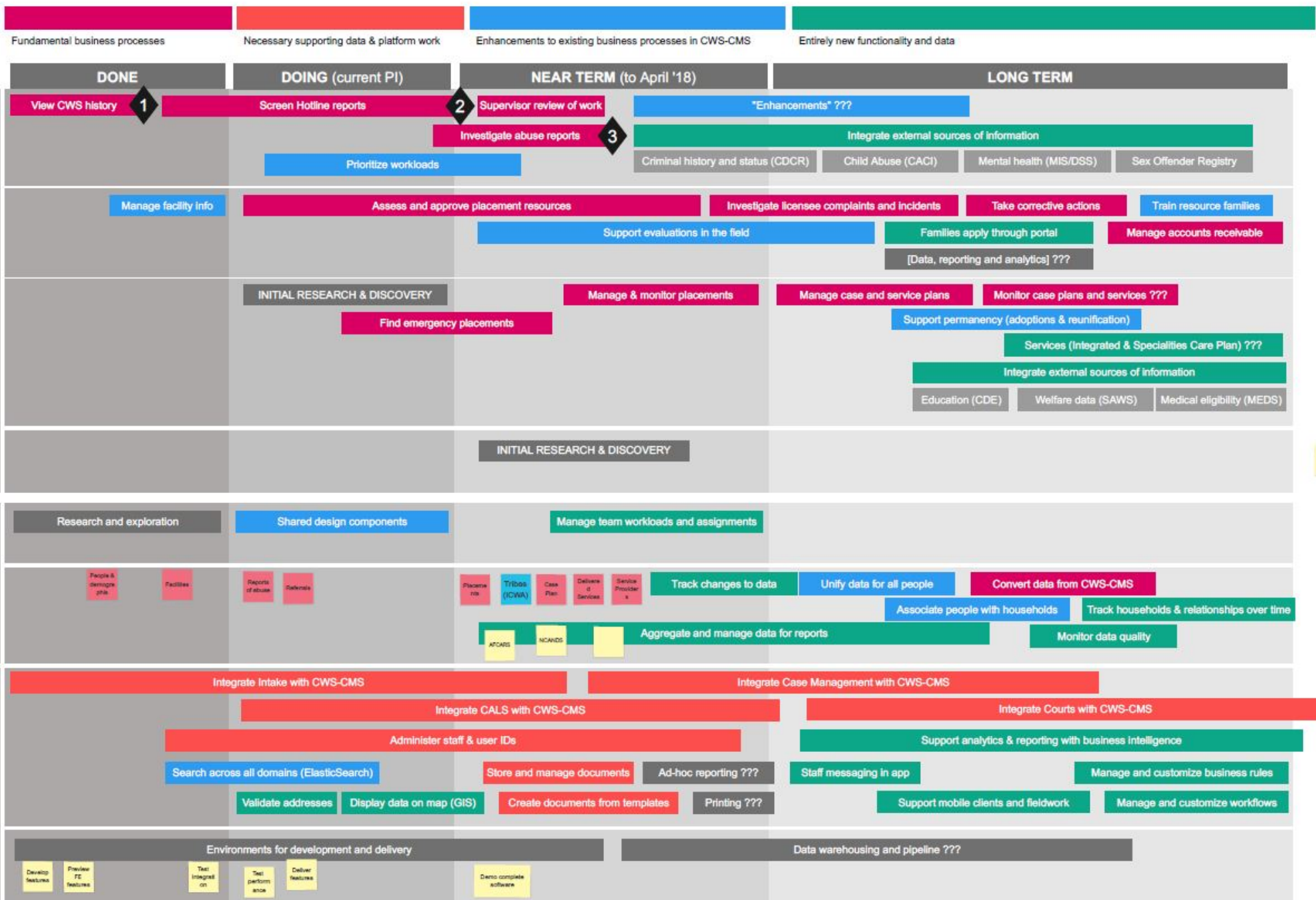- Integrate Cou... Cou...

SHARED DOMAINS

Design
- Research and exploration
- Shared design components
- Manage team workloads and assignments

Data
- People & demographics
- Facilities
- Reports of abuse
- Referrals
- Placements | Tribes (ICWA) | Case Plan | Delivered Services | Service Providers
- Track changes to data
- Unify data for all people
- Convert data from CWS-CMS
- Associate people with households
- Track households & relationships over time
- AFCARS | NCANDS
- Aggregate and manage data for reports
- Monitor data quality

TECHNICAL

Platform
- Integrate Intake with CWS-CMS
- Integrate Case Management with CWS-CMS
- Integrate CALS with CWS-CMS
- Integrate Courts with CWS-CMS

Shared services
- Administer staff & user IDs
- Support analytics & reporting with business intelligence
- Search across all domains (ElasticSearch)
- Store and manage documents
- Ad-hoc reporting ???
- Staff messaging in app
- Manage and customize business rules
- Validate addresses | Display data on map (GIS)
- Create documents from templates
- Printing ???
- Support mobile clients and fieldwork
- Manage and customize workflows
- Rec...

Infrastructure
- Environments for development and delivery
- Data warehousing and pipeline ???
- Develop features | Preview FE features | Test integration | Test performance | Deliver features
- Demo complete software

Challenges & Improvements

Kevin Gaines

Challenges

CWDS is improving the way public sector solutions are researched, designed, developed and operated.

We are helping modernize government processes such as procurement and staffing.

- Procurement
- Recruitment & Staffing
- Budget
- Agile Methodology
- Cloud Computing Infrastructure
- Free & Open Source Software

Improvements

CWDS is focused on innovation, talent development, and continuous improvement.

- Product-centric organizational design

- New recruiting methods for key positions

- Utilization of modern collaborative tools such as Slack, JIRA, Confluence

- Creative & collaborative culture which values:

Innovation:	Open Space
Sharing:	Noon Speaker Series
Wellness & Diversity:	Discovery Roundtable, Special Groups & Events

County Perspective

Cathy Turner

Resources

 https://cwds.ca.gov

 @CA_CWDS

 California Child Welfare Digital Services

 www.facebook.com/ CaliforniaCWDS/

 www.linkedin.com/company/ child-welfare-digital-services

 Comms@cwds.ca.gov

Agenda

Join us live: www.cwds.ca.gov/live
Email questions: comms@cwds.ca.gov

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