Child Support IT System Transformation

Introduction

The Office of the Attorney General will transform Texas child support service delivery and the technology that supports it through:

- Modern Software as a Service, integration Platform as a Service (SaaS/iPaaS), low code, and cloud technologies

- Embracing a full transformation to an Agile-at-Scale model, mindset, and practice

- A rigorous, yet adaptive, approach to project management, procurement and vendor oversight

The tools and processes we build through our modernization efforts will be nimble and responsive to the changing needs of the Texas child support program, so that the program can, in turn, be nimble and responsive to the changing needs of Texas families. In our chosen approach, we aim for sustainability, flexibility and quality.

Guiding Principles

Start small & build momentum

Contain risk through smaller contracts with quick offramps

Fully engage business users throughout the process

Develop requirements "just-in-time"

Configure when we can, customize when we must

Test early and often

Deliver quality, functioning software frequently

Plan, do, learn and iterate

Key Success Factors

- Strong agency Executive, Business, and IT Leadership support and collaboration
- Fully engaged partnerships with state and federal oversight teams
- Robust Agile Business Plan and Strategy Guide
- Business and technical teams empowered to make quick decisions
- Rigorous governance process with well-defined methods for prioritization of work
- Crawl, walk, run – plan to scale from a single sprint to many sprints operating in parallel
- Contracting approach that supports agility and meets stakeholder needs

Technology Strategy

- Adoption of proven modern technologies, standards, and low code platforms widely used in industry to build robust web applications

- Seamless and bi-directional data exchange between newly-developed CS portal applications and our current TXCSES Mainframe

- Development and deployment of a multitude of applications, platforms and infrastructure from cloud providers

- Custom applications will be developed to augment the overall strategy and fulfill all business roadmap requirements

- Gradual, iterative modernization of core child support functions in modern application platforms, with the Mainframe continuing to serve as the user interface for functions that have yet to be modernized

- Mainframe will continue to support back-end functions, such as payment processing, financial and batch processing, until all functions have been fully migrated to modern applications and infrastructure
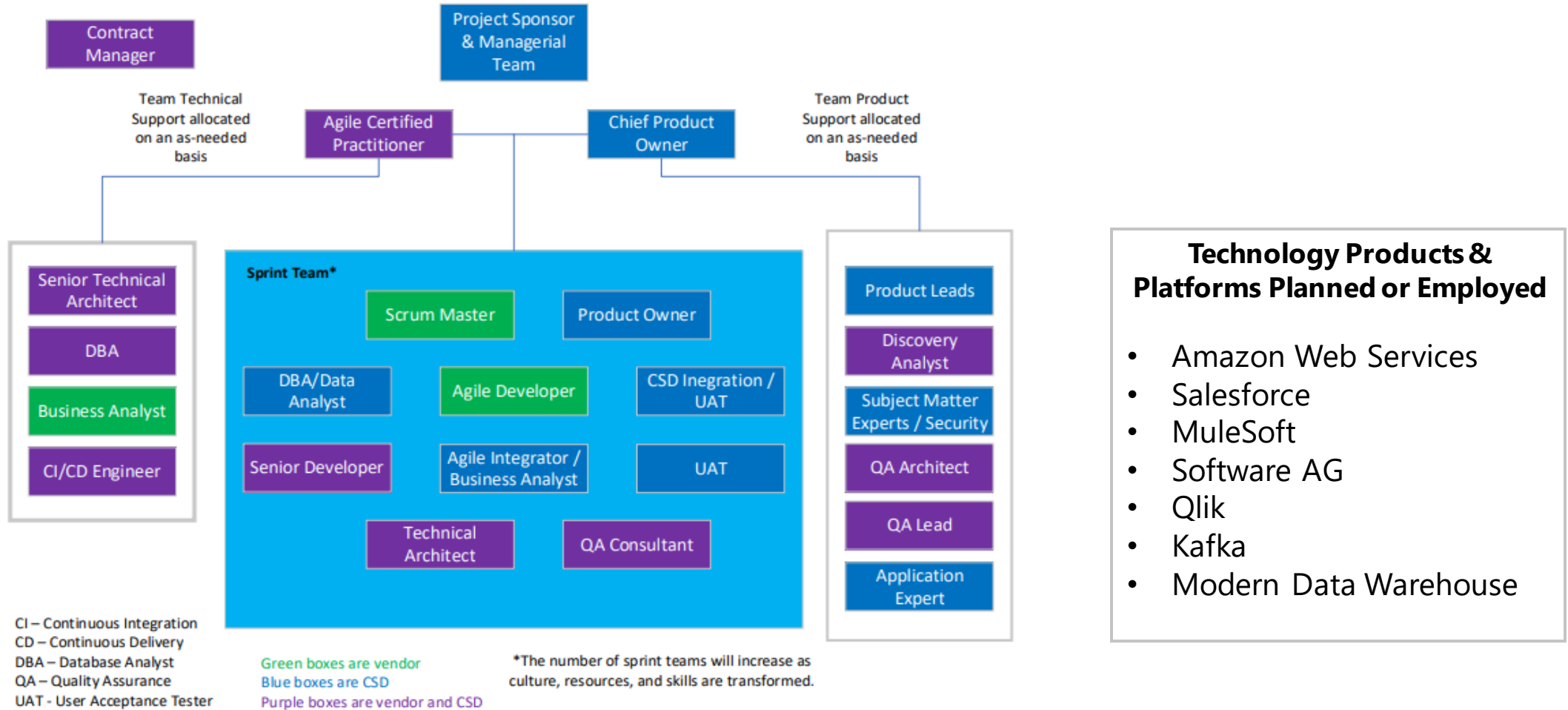
Agile at Scale: *How it Works*

- CSD's Agile process follows the Agile Manifesto principles and primarily uses the Agile Scrum model, augmented by other agile methodologies and industry best practices
- Sprints:
    - Are comprised of a group of individuals collectively known as a Scrum Team
    - Are timeboxed in duration (one to four weeks), and
    - Require specific, defined skillsets, roles and responsibilities
- Vendor(s) are contractually accountable and responsible for the successful delivery of the state-defined and approved requirements for each sprint
- Work must meet a strict "definition of done" that is defined and agreed upon prior to development

Agile at Scale: *How it Works*

- Requirements, in the form of User Stories, are developed <u>just</u> two weeks prior to day-one of the start of a sprint
  - Ensures requirements are not stale when development begins
  - Avoids change orders and cost overruns
- User Stories are decomposed into very specific and detailed requirements named "Acceptance Criteria"
- State staff (product owners and leads) participate in interim and final demos to ensure sprints stay in scope and on track
- During final demonstrations, state product owners must sign off on each specific requirement and validate that the software is production-ready

Project Organization

System Modernization Project Organization v1.0

Contract Manager

Project Sponsor & Managerial Team

Team Technical Support allocated on an as-needed basis

Agile Certified Practitioner

Chief Product Owner

Team Product Support allocated on an as-needed basis

Senior Technical Architect

DBA

Business Analyst

CI/CD Engineer

Sprint Team*

Scrum Master

Product Owner

DBA/Data Analyst

Agile Developer

CSD Inegration / UAT

Senior Developer

Agile Integrator / Business Analyst

UAT

Technical Architect

QA Consultant

Product Leads

Discovery Analyst

Subject Matter Experts / Security

QA Architect

QA Lead

Application Expert

CI – Continuous Integration
CD – Continuous Delivery
DBA – Database Analyst
QA – Quality Assurance
UAT - User Acceptance Tester

Green boxes are vendor
Blue boxes are CSD
Purple boxes are vendor and CSD

*The number of sprint teams will increase as culture, resources, and skills are transformed.

Technology Products & Platforms Planned or Employed

- Amazon Web Services
- Salesforce
- MuleSoft
- Software AG
- Qlik
- Kafka
- Modern Data Warehouse

Agile Contracting: *Key Elements*

Procuring sprints comprised of technologically advanced scrum team members requires a modified approach to the traditional procurement and contracting procedures used in waterfall type DDI projects. This new approach requires:

- A shift in mindset from buying "functionality" to buying a fixed effort (fixed team size at a fixed cost for a fixed duration)

- Inclusion of terms enabling ramp-up and ramp-down of sprints, including notification term (e.g., 30, 60, 90-day) for nonperformance or noncompliance

- Definition of the cost to add/subtract sprints/teams and associated Sprint Support Services

- Definition of the size of the (vendor) sprint team

- Defining what roles comprise a sprint team (both vendor and purchasing entity)

- Establishing a mixed-rate basis of cost for the defined sprint team vendor resources

- Defining the length/duration of a sprint and how that ties to payment points

- Establishing a "definition of done" and exit criteria artifacts for the sprint effort and tying completion of those to vendor payment

- Clear specification and contractual agreement on accountability and responsibility for a successful sprint delivery outcome

Agile Contracting: *Objectives*

- Contract(s) with a pool of vendors with proven performance developing and configuring low-code, cloud-based, software applications using an Agile-at-Scale model to provide sprints

- A public/private partnership requires each party to bring to the table their area of specific expertise:
  - CSD product owners, product leads and subject matter experts with strong child support business expertise will ensure applications are developed in accordance with state and federal guidelines, objectives and priorities
  - The vendor(s) must provide the technological skillset required to develop cloud-based, low-code application frameworks that integrate with CSD's existing computer systems

- Future roadmap elements (e.g., financial) may require CSD to contract with a vendor or vendors with experience directly related to child support practices, policies and procedures

Leveraging DIR Technical Support Services (TSS)

- TSS is a *Project-agnostic master services contract* between Texas Department of Information Resources (DIR) and Vendor (eff. September 2020)

- Implemented via OAG-CSD-executed Interagency Contract with DIR to leverage TSS for Systems Integration to procure agile sprint teams

- Benefits
  - Full, open, competitively bid and awarded master services contract
  - Represents lowest risk to CSD and prevents a multi-year, single-vendor-lock paradigm
  - With notice of 30-60 days (or fewer, in some circumstances), would enable OAG-CSD to discontinue ordering sprints if the TSS Vendor does not perform to agreed-upon standards and conditions or if agency needs require the capabilities of a different vendor

Opportunities to Participate in Extended Vendor Pool

- The OAG may elect to extend sprint teams beyond the TSS contract
- The OAG is not procuring a defined product, but rather teams of skilled workers to staff agile teams to draw upon as needed
- Options to utilize DBITS or ITSAC contract vehicles
- Anticipated period from time of award until 8/31/2023
- Single contract(s) will not exceed $5 Million Dollars for the initial term

Independent Verification & Validation

- Performed by an Independent Contractor in direct support of the state and federal stakeholders to provide an independent evaluation of project activities. The contract shall be managed by an external organization

- IV&V Contract must be submitted to OCSE for prior approval

- IV&V provider works with the OAG to develop an IV&V Management Plan that identifies the scope, depth, schedules, and resource requirements of the IV&V effort

- All Work Plans and Reports generated by the IV&V provider must be submitted to OCSE at the same time they are submitted to the State

- IV&V provider is not permitted to bid on any subsequent SOWs issued by the OAG

- DBITS opportunity for IV&V is targeted for Jan 2021

- Experience with Agile-at-Scale is required

Current Project Roadmap

This roadmap illustrates our overall project plan and intended order of work.

It is a point-in-time prioritization of work and will evolve over time.

Roadmap Descriptions

	Agile Transformation	Implement and gain buy-in for a methodology that focuses on quality of product and business value through processes infused with results driven collaboration between business and IT.
	Customer Contact	Develop a customer-centric application that combines functionality of several disparate systems into an intuitive platform that accommodates omni-channel communications and predictive knowledge-base articles.
	Enhanced Authentication	Provide customers a familiar and improved user experience for authenticating on customer portal. Offer self-service user registration and password resets.
	Interstate Case Portal - QUICK	Reduce time spent on slow manual communication methods for gathering interstate case status, by offering access to the OCSE QUICK portal. Reciprocate by providing real-time Texas child support case data to the portal for use by other states.
	Contract Management	Develop a user-centered modern contract management application, covering all aspects of the contract lifecycle, including invoicing, budgeting and monitoring, with integration to existing accounting system.
	Contract Monitoring	Leverage enhanced analytics and platform to provide improved outcome-based contract monitoring and facilitation of monitoring workflows.
	Virtual Case File	Develop a child support case document repository integrated with our to-be case management and document generation application, with improved document recognition and data extraction.

2021 Roadmap

Document Generation	Develop a single user-experience for all document generation and delivery, consolidating more than 7 current systems and methods. A new system integrated with our to-be content and case management system will allow for administration of document templates by business users.
Customer Portal	Provide more self-service options and greater visibility to the child support case status and next actions to customers. Generate more detailed user behavior analytics to support continuous improvement.
Case Initiation	Provide a user-centered design to facilitate case initiation workflows and leverage automated application intake and enhanced member and case matching/merging features.
Employer Portal	Reduce reliance on vendor provided solutions, bringing online form processing and data matching in-house, while improving automated employer outreach and follow-up.
Mainframe Modernization	The team will begin piloting selected modernization approaches October 19, 2020, with extensive work implementing the proven approach to continue throughout Phase 2.

Phase 2 Roadmap (Fiscal Years 2022-2023)

The products listed below represent the Phase 2 scope, which focuses on the development of the child support case management modules, targeted at incrementally bringing additional user groups online. Additionally, further enhancement to the contract management application deployed in Phase 1 will continue, as well as the addition of new monitoring modules to be deployed just in time for new contract implementations. As we approach the Phase 2 timeline and mature our modernization strategy, the Phase 2 products will come into better focus and the roadmap will begin to reflect the order of priority and execution.

Case Management
- Case Maintenance
- Member Maintenance
- Case Management - Core
- Legal Processing
- Employer Repository
- Financial Management
- Payment Processing
- Continued Document Development
- Continued Business Process Improvement
- Continued Enhanced Analytics Development

Contract Operations
- Vendor Performance Management
- Deliverable Management
- Contract Amendment, Renewal and Extension Workflows
- Budget Forecasting
- Vendor Information and Staffing Management
- Contracts Document Generation, Management
- and Workflow

Questions

For further information regarding the Child Support IT Modernization Project, please contact:

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