



# WorkSource Integrated Technology (WIT) Information & Technology Steering Committee

Providing strategic direction, prioritization and governance for systems and services of the WIT

**Date:** Tuesday, January 4, 2022  
**Time:** 9:00 a.m. – 10:30 a.m.

## Meeting Notes

**Attended by:** \*Jairus Rice, \*Mark Mattke, \*Maribeth Sapinosa, \*Amy Martinez, \*Carole Holland, \*Dan Zeitlin, \*Steven Ross, Cami Feek, Phil Castle, Eleni Papadakis, Sandra Miller, David Kuhn, Alberto Isiordia, Lekha Fernandes, Norton Sweet, Jennie Weber, Jessica Barr, Nona Mallicoat, Rod Van Alyne, Lisa Romine, Miriam Halliday, Bill Dowling, Gay Dubigk, Beth Marchand, Aji Lemcke, Linda Kleingartner, Anne Buchan, Elizabeth Court, Joel Getzendanner, Michael Luchini, Josh Stovall

**Unable to attend:** \*Katie Condit, Eric Wolf, Tiffany Scott, William Westmoreland, Marie Kurose, Joy Emory  
\*I&T Steering Committee voting members

- Meeting Objectives:**
- Official kick-off of new I&T Steering Committee membership
  - Mobilize/reinforce structures to support Steering Committee purpose
  - Align on WIT Replacement Project activities

- Decisions Made:**
- (Governance) – confirmed/approved voting members
  - (Governance)- confirmed/approved LWDB CEOs will be invited as Steering Members, can participate in discussion, and voting will be limited to the 4 representatives identified in the charter
  - (Governance) – reviewed/ approved WIT Replacement Phasing strategy:
    - PHASE 1- ETO REPLACEMENT- Case mgmt. system, data migration from ETO
    - PHASE 2- Labor Exchange system (LEX)
    - PHASE 3- Possibilities- new enhancements, Title II, Title III.
 There will be a single RFP for both the case management system and the Labor Exchange. LEX can be awarded to a separate vendor should that be needed. The RFP can also be structured to not fund LEX at all. The main focus is the case mgmt. system and to replace what is done in ETO for Title I and Title II

- Action Items**
- Mark Mattke (Decision Needed)- work with the 12 LWDB to identify new LWDB voting member
  - Nona Mallicoat- update Charter & bylaws with approved membership / voting members
  - Nona Mallicoat- schedule 2022 Advisory Committee Meetings
  - Maribeth Sapinosa / Linda Kleingartner- send dashboard status reports re: work in IT and Intake via email

## Discussion:

**WorkSource Governance** –| Jairus Rice & Mark Mattke

### I&T Steering Committee

Focus:

- strategic direction and prioritization for new systems and services

Role:

- Responsible for driving strategic priorities of the WIT Project and WIOA Solutions
- Members engaged in all major decisions about project scope, vendor selection, budget, and schedule
- Chair and Co-Chair responsible for agenda items to committee in timely fashion

Responsibilities:

- Sets WS IT enterprise business strategy
- Ensures ED strategic alignment w/ agency directives, legislation, and program compliance
- Define business continuity objectives
- Monitors and balances the WS investment portfolio
- Evaluates and direct WS enterprise governance
- Determines available funds
- Monitors WS portfolio performance and execution, makes decisions about project initiative and approval and sponsorship prioritization, and impacts to other projects and initiatives
- Endures work priorities are aligned w/ business, technology, and service solutions meet the needs of job seekers, employers, and staff.
- Performs proactive problem management

**I&T Advisory Committee**

Focus:

- operations feasibility and organizational readiness

Role:

- Recommendation forming committee responsible for assessing operational feasibility and organization reading for Steering Committee priorities
- Develop initiatives that meet goal of the system
- Members and part-and-parcel to most project teams and identify and assign SME's to meet project goals
- Review Intake and Analysis Committee Solution Request process, determine what goes forward

Responsibilities:

- Assessing and processing enhancement request to existing solutions (ETO and WSWA)
- ETO and/or existing interfaced solutions will be top priority

**Intake and Analysis Team**

Focus:

- Existing system enhancements, required updates and data integrity.

I&T Advisory Committee is responsible for reviewing and relaying recommendations that could be generated from the Intake and Analysis Team. With the WIT Replacement Project underway, the Intake and Analysis Team will focus on current system operations (WSWA and ETO). The I&A Team is not part of the WIT Replacement Project focus (although they can inform on trends and needs).

**(Advice) – Advisory Committee / subcommittees to support WIT Replacement project**

The WIT Replacement Project will need various groups to inform the project's deliverables and be heavily engaged in the implementation activities. The proposed approach (and subsequent advice confirmation) is to form subcommittees and teams that will conduct this business, as a subset of the Advisory Committee.

**WIT Portfolio Strategy** | David Kuhn

**WIT Roadmap-** Develop and maintain a product profile that enables customer-centric workflows using best-in-class solutions that modernize services for program-based management.

**Problem/Current State-** the WS partnership depends on aggregation of participant data properly report to DOL. Current portfolio lacks system interoperability and core data integrity due to multiple shadow systems which has resulted in audit findings and potential funding loss. Various applications were acquired (RAS, Trello, etc) to meet local office needs without consideration of risk, policy compliance, technical standards, etc.

**Problem/System Alignment-** the customer experience was not previously considered, and data integrity requirements led to an unmanageable system administration.

**Solution/Product Strategy**- there are currently 70+ application and services used by WS partners and 40+ of them can be considered core solutions. A strategy or remediation and consolidation is needed to develop a modern and sustainable WIT portfolio.

**Strategic Consideration**

Portfolio Strategy - Solution Portfolio Management			
Streamlined Solutions and Consolidated Architecture	Core Solution Areas		
	Intake & Referral	CRM & Case Management	Self Service & Communications
Strategic Consideration:			
Risk Mitigation	<ul style="list-style-type: none"> <li>Customer confusion and Program-to-program inefficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Participant and employer program and profile data scattered across systems.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure channels for job seekers and employers matchups exist.</li> <li>Co-marketing with employers</li> </ul>
Technical Standards	<ul style="list-style-type: none"> <li>Feasibility of solution to operate outside of ESD Administration</li> <li>Modern tech stack and published and maintained APIs.</li> </ul>	<ul style="list-style-type: none"> <li>Ability to aggregate data into the primary system of record.</li> <li>The only case management system of record for the State.</li> </ul>	<ul style="list-style-type: none"> <li>Omni-channel capabilities and robust APIs.</li> <li>System administrative tools Enable complex configuration.</li> </ul>
Policy and Permissible Use	<ul style="list-style-type: none"> <li>Can data reside on the platform securely and according to policy</li> <li>Can all staff use platform.</li> </ul>	<ul style="list-style-type: none"> <li>Platform compliance (e.g., SOX) to system admin tools that support proper config.</li> </ul>	<ul style="list-style-type: none"> <li>Equitable access and inclusion.</li> <li>Compliance configurable.</li> </ul>
Best-in-class Solutions	<ul style="list-style-type: none"> <li>Widely used platform and proven industry success.</li> <li>Focus on CX and published and maintained APIs.</li> </ul>	<ul style="list-style-type: none"> <li>Widely used platform with proven industry success.</li> <li>Published and maintained APIs.</li> </ul>	<ul style="list-style-type: none"> <li>Widely used platform with proven industry success and highly focused on CX</li> </ul>

**WIT Replacement Project Update |**

Monthly Status Reports will begin at the end of January (deliverable at the next meeting) and include highlights of the activities completed in prior month

**Decision Package | Carole Holland**

Governor's budget included this request. The Depts has put this forward as a priority for CPP and state funds.

System Replacement

- A contract must be procured
- Current system has significant deficiencies and has caused audit finding
- ESD will issue and RFP
- Will require oversight of Office of Chief Info Officer (OCIO)
- Off-shelf system configured to meet bot state and local workforce development board needs
- Estimated cost of \$4.8 million. DP also requests funding for SFY 2024 of \$7.5 million and SFY 2025 of \$8.3 million, which includes data migration and on-time costs for configuration

Root Issues to be Solved

- Insufficient data validation
- No employer mgmt. capabilities
- No grant or contract mgmt. function
- Lack of interoperability with other required systems
- Limited workflow automation
- Non-compliance w/ quarterly WIOA performance reports

**Project Corner | Linda Kleingartner**

*January:* Project mgmt. plan, Project charter, Scope/project phasing, Work breakdown, Dependencies/ resource planning and Communication/Stakeholder plans

*February- April:* OCIO Gate 0 deliverables, secure Quality Assurance Vendor, Project schedule and initiate project success elements (go-live criteria, data migration)

## **RFP – Technology System Vendor | Nona Mallicoat**

*January-February:* Compile research, visions into base document and identify RFP teams (teams will be participating in demos, subcommittees, etc.)

*March-April:* RFP Teams develop RFP section recommendations and Advisory review of RFP Team materials

## **Project Staffing | Beth Marchand**

- Project Mgr. position being recruited- assigning temp ESD Project Mgr until the position is filled
- Interim project Mgr. will work on vendor RFP Team and build out requirements
- Customer Experience Mgr. and Product Analyst assigned to the Procurement Team