

Child Welfare IT Managers' Webinar Series: Back to Basics

"Fundamentals for a Child Welfare IT Manager"

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Brady Birdsong, Chief Information Officer with the Child and family Services Agency District of Columbia

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode.

During the question and answer session please press Star 1 on your touch-tone phone.

Today's conference is being recorded if you have any objections you may disconnect at this time.

And now I'd like to turn the meeting over to Ms. Joyce Rose. Thank you.

Joyce Rose: Thank you and welcome to Webinar one of the six part series Back to Basics, The first Webinar will explore the commonalities and competencies of the Child Welfare Information Technology Systems Manager and is brought to you on behalf of the Health and Human Services Administration for Children and Families Children Bureau presented by ICF International.

I am Joyce Rose, your host and moderator for today's Webinar. Joining me a bit later will be Joe Vastola Director of the Enterprise Project Management Office for Florida's Department of Child and Families and Brady Birdsong Chief Information Officer with the Child and family Services Agency District of Columbia.

Changes in funding availability and priority mean that opportunities for in person discussions and networking among professionals working on state child welfare IT systems will be limited this year and likely in future years.

Through this Back to Basics series of Webinars the Division State Systems within the Children's Bureau is offering a venue for information sharing and discussion.

We will be offering six Webinars one per month between April and September 2013. While the Webinar's offer some structured content our goal is that they spark discussions and information sharing within and across state and federal attendees.

The Webinars are intended not just for child welfare IT systems managers but also the staff with whom they work who are key players in keeping and getting child welfare IT systems up and running.

Although ours series theme is back to basics we invite and encourage participation from both experienced and newer managers and staff recognizing that even the most experienced among us have something new to learn or may need a refresher because the field of child welfare information technology changes rapidly.

This and all future Webinars are being recorded and will be made available online as referenced and informational resources for you and your staff.

A Listserv notification will be distributed once they are made available with instruction on how and where to access.

Today's first Webinar in the series What is a Child Welfare Information Technology Systems Manager will review at a high level some of the common skills and competencies that all child welfare IT system managers have.

Subsequent topics in the Back to Basics series are Webinars two and three will be a discussion of the stages of the child welfare information technology systems project lifecycle. We are doing part one in May and part two in June.

Now let me differentiate that these two Webinars are about the project lifecycle and not the application development lifecycle.

Webinar four will identify common pitfalls and discuss how to avoid them. And that is scheduled for July.

The remaining two Webinars numbers five and six will go into more depth and detail of some of the stages of the project lifecycle and will be shaped in part by your feedback and identification of other specific topics having the most interest and benefit to you.

Attendees are encouraged to participate in our Webinar with questions and comments. All of our participant lines are now muted but we will open them at the end of the presentation for discussion.

You can also submit questions through the GoToWebinar chat feature though we also will save those questions until the end of the presentation.

Should we run out of time we will respond to your questions via email and should you have any additional questions you are encouraged to submit those to me at the email address listed on the slide joyce@kassets.com.

We are very interested in knowing who is attending this Webinar in terms of position or capacity. We ask that you self-select one of the five categories listed above when you're poll opens. Also recognizing that not all states are SACWIS states and to be inclusive of everyone.

We will use the more generic Child Welfare Information System CWIS identifier for polling questions and throughout this presentation. We'll wait a couple a minute or so for you to respond to the poll.

Elizabeth Mertinko: Okay Joyce we have the poll results up.

Joyce Rose: And where would I find those?

Elizabeth Mertinko: They should be shown on your screen. We have 24% state CWIS project or program managers, 32% state CWIS technical manager, 24% state CWIS project staff, 16% ACF Children's Bureau and 4% other.

Joyce Rose: Okay so we have a very diverse group. And we are well represented across the different disciplines in a SACWIS or CWIS project.

So next we are also interested and we would like to understand what our attendee level of experiences - experience is within the CWIS environment. Are you a relative newcomer or are you a seasoned veteran? Again please self-selection.

Elizabeth Mertinko: Okay. And we have 7% zero to two years, 7% two to four years, 25% four to six years, 14% six to eight years and a whopping 46% nine years or more. So we have a pretty seasoned audience.

Joyce Rose: Wow we sure do. And I truly welcome the newcomers and hope that our guest panelist can provide tips and tricks for you.

So let us move on and review today's agenda. First of all the format of this Webinar is approximately 35 minutes of content presentation, 30 minutes of

guest presenter dialogue, and then we invite all attendees to participate in approximately a 20 minute Q&A session followed by a short wrap up.

So we will provide introductions, identify key competencies, understand expectations. We want to help you understand the expectations of both internal and external stakeholders.

We will discuss teambuilding and collaboration elements. We'll briefly talk about project management credentials and then moderate discussion between our guest presenters followed by Q&A and then briefly a wrap up.

So introductions, our two guest participants probably need very little introduction but let me briefly introduce and extend they welcome to both Joe and Brady.

Joe is the Director of the Enterprise Project Management Office for the Florida Department of Children and Families.

He joined DCF in 2005 and prior to his current assignment served as a DCF Director of Application Development and as the Project Director for Implementation of the state's SACWIS the Florida Safe Families Network.

His primary responsibilities included transitioning the state from a limited legacy child welfare system to a solution and platform capable of supporting the full set of SACWIS requirements and able to support the state service delivery model integrating internal workers with outsourced child welfare providers.

Brady is the Chief Information Officer for the District of Columbia's Child and Family Services and as such oversees the district SACWIS.

Earlier this month he celebrated 12 years on the SACWIS project. And during this time has developed a passion for child welfare and how data and technology can and must support positive outcomes for children and families.

We are pleased to have both experienced and qualified individuals as our guest participants.

And myself formally the Project Director for the State of Wisconsin SACWIS project retiring from state service in 2004 and since that time I have been involved with several ACF Children Bureau sponsored training events.

So let's begin by identifying some key competencies that CWIS managers share in common and which contribute to successful project outcomes as well as to the growth of their teams.

These competencies are highly valued, are a common set of competencies, and are commonly found among all state CWIS managers.

The successful state manager possesses a threefold set of knowledge combining personal, business, and leadership with technical skills.

On the personal side these are foundational characteristics and competencies that support a person's project management capability including influence, self-confidence, flexibility, action orientation, organizational awareness and a powerful interpersonal acumen.

Next are the business and leadership competency. These critical skills enable project managers to link to any given - to link any given project to the relationships, resources, and infrastructure of an organization and include a big picture focus, political savvy, strategic positioning, business operations knowledge and the ability to build relationships.

Last but certainly not the least are the technical competencies which are a comprehensive set of classified skills, knowledge and attributes that might describe a highly successful CWIS manager.

However this list does not encompass all of the technical issues and components that the typical state manager or staff encounter during the project lifecycle.

Certainly the ability to manage integration issues, control (unintelligible), make sound release decisions, assess system quality, manage vendor relationships and control stakeholder expectations are all part of the package. And anyone left unchecked can contribute to the manager and the project's success versus failure.

Briefly the five technical competencies I have chosen are all an integral part to the initial project planning phase as well as ongoing competencies used during the entire project lifecycle.

Those competencies which I have chosen are budget and research allocation, requirements development, risk management and mitigation, communications and teambuilding.

Now the project planning phase is the second phase in the project lifecycle following project initiation and is often the most challenging for a project manager.

It involves creating a set of multiple types of plans to help guide your team through the execution of the subsequent phases of a CWIS project.

The plans created during this phase will help to manage cost, help to manage resource allocation, requirements development along with change, risk, and issues.

They will also guide you in developing a communications strategy and managing team dynamics.

We would like to offer our third attendee poll please and in your opinion -- and we invite everyone to vote regardless of your position or capacity -- what do you think is the most important skill set that the CWIS manager needs to bring to the table during the project planning phase?

Elizabeth Mertinko: Okay so our voting had stopped. We have 18% budgeting and resource allocation, 21% who thought requirements development, 4% risk management and mitigation, 43% communication and 14% teambuilding.

Joyce Rose: Okay. So most - the largest percentage of our audience believes that communication is the most important competency for the manager during the planning project planning phase.

That's very interesting. I am surprised that risk mitigation is relatively low on this scale but perhaps we can talk about that during the Q&A session.

So now let us move to the second attendee poll using the same competencies. In your opinion, what is the most important skillset you believe the most important skill set for the manager to exhibit during the maintenance phase? So let's see if we see a shift in competency identification.

Elizabeth Mertinko: Okay. This time we've got 20% budgeting and resource allocation, 13% requirements development, 20% risk management and mitigation, 37% communication, and 10% teambuilding.

Joyce Rose: Well it appears as though communication is a clear cut winner whether - regardless of what project lifecycle phase we're in and I certainly agree that open communications is vitally important as you proceed through the continuum of a SACWIS or a CWIS project.

Now in retrospect we probably should have had an all of the above option as certainly these are all ongoing competencies and challenges. And thank you for participating in our attendee polls.

Now let's talk a bit about understanding internal stakeholder expectations. There are many issues that organizations or other entities can have that both directly or indirectly influence the success of a CWIS manager.

Most projects span several years from inception to completion of the statewide implementation to reaching federal SACWIS compliance.

Over this extended period of time they likelihood that changes to agency whether federal, state, or County, administration, Governor, or Commissioner, or a state legislated representative may introduce new challenges or new priorities and with those come new expectations which may affect deliverables and timelines.

The CWIS manager must be able to cope with the various expectations and be flexible in order to respond and adjust accordingly.

The CWIS manager must be fully aware of and knowledgeable of state procurement processes as well as the federal perspective on this issue.

Basically the underlying principles for the procurement process is to provide and assure a forum and method by which free and open competition occur and that states procurement process is articulated and clearly followed by all involved in the process.

Successful operation of a child welfare system is heavily reliant upon the many resources provided by either centralized or decentralized IT departments?

Direct and open communications as well as building a trusting working relationship with the IT staff must be a primary concern and function of the CWIS manager.

Finally the system end users have many key roles and responsibilities in the Child Welfare Information System project lifecycle and should be highly involved from its inception.

They are the primary source of information regarding business processes and the objectives and needs which the Child Welfare Information System should be designed around.

It is the end users whether they are state, county or privatized agencies who will determine the quality and usability of a SACWIS or CWIS system.

Remember this the bitterness of poor quality lingers long after the sleepless of meeting schedules is forgotten.

Now let's shift to understanding a discussion of what our primary external - the expectations of our primary external stakeholder our federal partners.

If a state desires Federal Financial Participation FFP in the funding of a CWIS initiative one must receive federal approval through a series of review and approval processes initiated and updated by Advance Planning Documents, APDs.

In summer the primary purpose of an APD is to request Federal Financial Participation FFP, two to present a business case and plan to support federal expenditures for IT acquisitions, number three is to demonstrate that all appropriate IT planning has been considered.

And four to establish that sufficient resources are allocated and disciplined processes are in place to achieve project objectives.

There are two categories of APDs. The first is PAPD (a Planning Advanced Planning Document) containing an action plan which requests FFP to determine need, feasibility and cost factors for IT services or equipment acquisition.

The second is an IAPD or an Implementation Advanced Planning Document focusing upon the written plan of action supporting the request for FFP to acquire IT services for equipment.

Once a project has begun an annual APDU update must be submitted to request continued approval of project activities and funding, to inform the federal government of project status and to update project related information.

During the lifecycle of a project there are three relevant types of APDs. First is the annual providing official project status, requesting continued funding and reporting post-implementation costs and benefits.

The second one is an as needed. This is used to report significant changes to project approach, procurement, methodology, schedules or costs.

And the third is operational. This is a record of no more than two pages submitted annually by states once the IAPD or the Implementation APD has been closed out.

This document provides a short summary of the activities, method of acquisitions and annual budgets for operations and software maintenance.

The CWIS manager may or may not be the author of these documents. If not the manager must be directly involved in the development and review of the documents and will most likely spend a lot of time providing key information.

The manager must be intimately aware of what the federal SACWIS mandatory requirements are and comply accordingly.

Those requirements include specific electronic interfaces to other systems or applications, numerous data reporting obligations and assorted federal programmatic reviews.

Lastly while there are no specific certification requirements for a SACWIS there are a number of system functional requirements which are used as the basis for and guide to a federally conducted SACWIS review.

Once a system is operational ACF will conduct an report the results of a SACWIS Assessment Review the SAR.

And the purpose of the review is to ensure that all aspects of the project as described in the states approved Advanced Planning Document have been adequately completed and conform to applicable regulations and policies.

Our subsequent Webinars within the Back to Basics series will cover the federal regulations requirements and reviews in much greater detail.

This graphic is a general and hopefully a useful guide that you could use for helping to manage and contain both internal and external expectations.

Certainly on the top left one needs to involve customers and stakeholders to define needs and wants.

You need to be fully aware of the values of those stakeholder groups generally gained through communications remember communications was the highest score on our poll in terms of what competencies whether in project planning or through maintenance the need to assess risks and address them accordingly, develop mitigation's strategies. It is important to establish an approach to market your application.

We need to set realistic expectations whether its budget, whether it's scope and benchmarks. Communicate those expectations and do not create false hopes.

Then follow through on the communications assuring their processes are credible and open. You need to measure performance so that if we need to we

can realign or change expectations, communicate those changes. We demonstrate a shift in broader concerns.

And then something that I think that we probably are all negligent at is to celebrate those met expectations or interim successes. And of course the cycle starts all over again the next day.

Building a good team is the single most important thing a CWIS manager can do to achieve a successful project. With the right attitude a team will overcome almost any difficulty to succeed in its goals.

In most projects only the solid determination of a team can overcome the difficulties and carry initiatives through to success.

Even when there is no pressure the team spirit and enthusiasm will be reflected in the quality of the solution and the extent to which stakeholders and end users buy into it.

So our teams work because they are natural problem solvers. Generally they are a collection of the organization's best assets.

A team provides a learning forum for and is inclusive for everyone involved allowing each individual to play a valuable role.

A team fosters both personal and team responsibility and accountability, allowing individuals to step into leadership positions to grow and assume responsibility for their efforts. And teams bring attitudes, determination, spirit and enthusiasm.

So what factors determine a good team? The best team cultures develop when - where team members recognize that everyone has important values to contribute and where there is a shared belief in the achievability of the goals, and awareness of the value of each of the individuals involved, where there is a desire to work collaboratively sharing thoughts, ideas and concerns.

There is an enthusiasm to provide support to each other, a willingness to coach junior members. And remember that that knowledge transfer is so important. And again teams must take time to celebrate their successes.

So in 1965, a psychologist by the name of Bruce Tuckman first came up with the phrase Forming, Storming, Norming and Performing to describe the path that high performance teams follow.

Later he added a fifth stage called adjourning. Now others often call it norming simply because it rhymes better with forming storming and norming and performing.

The CWIS manager must understand the teambuilding collaboration occurs in these five stages.

And I doubt there is a manager attended today's Webinar who has not been challenged and perhaps frustrated as their teams formed and evolved.

So let's go through each one forming stage one is where team members acquaint themselves and form their own ground rules.

Number two is storming. Your team members resist control by group leaders and show some hostility. And that's probably based on the fact that they may not yet fully understand expectations or what their responsibilities may be so there a little hesitant and they may show some hostility.

So finally we get to the third stage where team members norming with - where team members work together. They begin to form their close relationships and feelings of camaraderie.

Moving in to the performing stage here team members focus upon working toward getting their job done and to achieve project goals.

And then finally is adjourning. Here is where a team may disband upon achieving project goals. And certainly once statewide implementation is achieved in a SACWIS system or a CWIS system and you move to maintenance there may be a adjourning of the team because your application is no longer considered and classified as a high priority departmental project.

It may just become another departmental application in maintenance mode. So your original team may disband or adjourn.

And remember that any change in the compositions of a team or its leadership may return a team back to the forming stage.

So credentials there are any professional project management certifications available from an assortment of organizations.

Probably the most commonly recognized organization is the Project Management Institute or PMI who offers an assortment of credentials that best fit your expertise and career goals.

And they can span - so they include a certification for an associate in project management, the PMP which is the Project Management Professional there is the Program Manager Professional.

There are certifications regarding agile. And also risk management and scheduling. And then there is a professional certification that is - deals with organizational project management and really project management maturity.

So while not endorsing any specific organization or a credential the benefits of certifications are really multi fold. One is certainly the acquisition of knowledge.

Two there may be more career opportunities because more and more companies including state and federal governments are placing a high value on certified professionals.

And perhaps this is something that Joe can speak to given his position as the director of this agencies enterprise PMO during the Q&A session.

Certifications provide a sense of achievement. It's great to feel good about yourself and certainly can increase self-confidence.

And with certification there can be a financial opportunity probably more in the private sectors then public.

And just the recognition of your peers your accomplishment in achieving certification is a feel good thing.

So let's now invite our guest participants Brady and Joe to share with us their experiences. Brady and Joe are you with us?

Brady Birdsong: I am. This is Brady.

Joe Vastola: Yes Joe is here.

Joyce Rose: Great. Let's start with our question one. And Brady I'm going to ask you to start us off here and hopefully you a Joe and have a great dialogue and provide some expertise and - to our attendees. So what is it in hindsight that would have made you a better SACWIS manager?

Brady Birdsong: What I was going to say ten years of experience. But since everybody else on the phone has about 46% have nine plus years of experience too that's probably not really going to - everybody's is in the same situation right?

We've got years of experience. And looking back on what would have made us better from the start I think, you know, one thing is you really can't, you know, the experience is something that you have to earn over time.

But I really think Joyce it's more about soft skills than it is the hard core technical knowledge and abilities.

And probably that's because I didn't start out having a lot of - I didn't start this career from a technical standpoint.

I started out - my career with SACWIS at the help desk answering questions from social workers about the system.

And so, you know, I had to really rely upon soft skills of knowing how to talk to people and work with them as they were questioning the SACWIS in its early stages and how to use it.

But I think what's really important too is I really look at these things as again as from the soft skill perspective.

And focusing less on the Child welfare and information system manager part the CWIS part and really focusing in on the fact they we're managers and that we're leaders and developing our leadership skills.

You know, I had a strong staff that I could really rely upon. And I think hopefully everybody does. That would fill in the technical gaps if there were any.

You know, and I'm not minimizing the fact that it's important to understand the technical aspects of course and to grasp but, you know, we're really leaders in leading our staffs and also exhibiting leadership skills across the entire agency and the organizations that we work with.

So I think that's very important to understand that we're really leaders. And also I think what would have been really helpful for me was to really understand better my philosophy and my approach to getting work done and understanding my strengths in my weaknesses.

And then making sure making sure that I had the staff that were augmenting where they were probably gaps in my - where the weaknesses were to shore up my weaknesses.

So I think what is also really important is I've learned and grown in my job having been the CIO - for since 2007 is also making sure that my staff that the

folks who work underneath me understand who I am and the perspective that I have when I'm approaching work.

And making sure that they understand, you know, I am an idea generator. And you give me a problem and I'm going to try to come up with probably ten, 15 different ways to look at that, and to analyze it, and to solve it but making sure folks understand when we leave the room what I'm asking them to do and how the approach that we're going to take to solving problems.

You know, because again one of the things is making sure that you have this staff that can support you in that because while I do a really good job of understanding all the steps and the multitude of tasks that have to get done to do a job I'm not the best person at actually carrying out those tasks. And so making sure that I have - I'm surrounded by doers.

And so I think everybody has to understand what they bring to their role as a manager and a leader in whatever you're doing.

And then really understanding how you convey that to the people that you have to have support you in your roles.

Joyce Rose: Thank you Brady.

Brady Birdsong: You're welcome.

Joyce Rose: Joe do you want to jump in here and provide your perspective?

Joe Vastola: Sure. I'm happy to. And I'm happy to be here. I'm thinking this first question and what in hindsight could I have done the do something better?

I figured when you thought of that question the first person you thought who learned so much and could have done so better was Vastola.

So I'm going to have to catch up with Brady after this because we've got a quiet bet as to who was picked first to talk about publicly how much we could have known to do a better job.

But I think when I look back and the situation that we're in now where we're taking our child welfare system and we're implementing large enhancements to the system to refine some of our processes.

And I think the - that probably what I could've done would have been to not get too comfortable. So we did this huge project to implement a system.

There was a tremendous amount of attention and momentum. And then you implement it. And collectively the organization kind of you, you know, has a sigh of relief that, you know, you've got it in and now what are the next steps.

And so I think in many ways when we did that and we moved into a maintenance environment, you know, you kind of become pretty comfortable.

The systems out there it's running. We need to keep it running. Focus on our technical requirements. And I think you lose some of that momentum.

And it takes energy and time as a child welfare systems manager to keep that focus in front of your customers and to make sure that, you know, they know continue to understand that you and your team know how the system is being used.

I think communication I would say in my experience again, you know, when you exit that project work all of a sudden now you've got all of these various stakeholders.

We're all using different components of the system. And I remember back when we implemented we had weekly calls and everybody was engaged.

And it takes work and it takes energy to keep that momentum, that level of interaction, the feedback loops going.

And I think in retrospect we - I certainly think we could have gained considerable value if we'd of looked at those project processes knowing that we wouldn't have had the resources and the funding to continue them all but to make sure that we held in place so that we didn't have to gin them all back up as we got into some of the work that we're doing today.

So, you know, maintaining that continuous focus, not getting too comfortable, making sure - I know from me whenever there was a discussion for quite a while here about what we need to do with the system, and how do we do this, you know, as a SACWIS as a child welfare manager you get the call and you'd go and help the department know, you know, how to advance and use the system but making sure that our teams are building that knowledge too.

Oftentimes we've got a different dynamic when we move into ongoing maintenance for our systems where the teams change in some cases our vendors change.

And so you've got to make sure that you really keep that focus on knowing how the system is being used in the field.

I think I remember as we moved into (MNO) my first thought was okay well I get a little break I don't have to travel the state and see what the issues are and what the requirements are.

And I think - doing the best that you can to maintain that link to the field and really look to see how the systems being used even if it's been out there for years.

I think challenging in fact as we do this now I've come to understand the importance of it. And I think how far along we would be if we would have started some of these activities after we implemented the system.

But looking at some of these processes that people are using every day and challenging every one of them to make sure they're efficient, to make sure that what's out there and working, you know, even though its working is it working right?

And really maintaining that focus, you know, bringing the focus that you had when you implemented further along.

I think child welfare managers you certainly need to continue and I've had to continue to foster the understanding with your customers of the link between the system and practice.

Here in Florida I don't know how it is in other states but as I've been here eight years there's been tremendous changeover in the program areas and in the field areas and so some of that institutional knowledge that people who define the system when it was implemented developed is lost.

And so you have to make sure that you're continued to communicate how the system can be used, and what its capabilities are and put that feedback loop in place.

I think you really need to stretch your teams too, you know, if you're managing a technical team, or if you're managing a program team that's, you know, supporting your child welfare environment and delivery model you've got to challenge the team to think about different ways to use the system.

Same thing occurs with vendors. I'm sure a lot of states like Florida have significant dependence on vendors.

And so, you know, we pay a lot of attention to the resources and energy that the vendor applies to get the system in. And again we kind of go into a comfortable mode when we get into maintenance.

So working with your vendors, making sure you still understand their challenges and effectively supporting and moving the system forward as you get into that long run of maintaining and using the system.

Making sure that your vendors have a good connection to how the businesses using it I think is very important too.

And so for us, you know, the - when you talk about the child welfare environment in terms of the child welfare system it is a - it's a group effort. It's our program office. It's our IT shop. And it's our vendors who support the system.

So maintaining a communication across those lines again very similar to what Brady had talked about the softer skills of making sure the right connections are there and the right information is flowing.

That as a manager you're well in tune with any changes to the business. I mean I know even in the short time since we've implemented our child welfare system our business has changed.

So I'm sure states that have had a system longer than Florida have seen even more changes. So being creative and presenting ways that you can use the system and staying current on it to support these new business changes and models I think is important.

So you do kind of have to become and I think I certainly could have benefited from being a little more of a cheerleader after we got this thing in to make sure that the messages were getting through, the same communication taps of people who had to know what was going on with the system were in place, and that the communication paths back to the team of challenges that people had as they used the system particularly as new folks come into the organization.

Probably like a lot of states we had significant turnover at our child protective investigation areas. And so there's a regular exercising of the training and the materials.

And I think, you know, working with our business offices and making sure that we contribute to keeping those things current is always a good idea to do to keep your team engaged and to make sure that the systems being used correctly.

Joyce Rose: Joe I this is Joyce. And I wholeheartedly agree and Brady I agree with what advice you provided. You know, I - this whole transition planning is really, really important.

And you cannot start early enough. I know on the Wisconsin project, you know, the primary focus is just to get this thing implemented statewide.

And you get there. And it's kind of like wow the kind of want to let the air out of the balloon but the balloon does not deflate.

So it's very important to have made some decisions and done some transition planning long before you get to the maintenance phase. Brady do you have any additional comments?

Brady Birdsong: No. Not off the top of my head. I mean I've always get additional comments but not right now.

Joyce Rose: Okay all right. Let's move to our second question and Joe we're going to start off with you this time. What advice do you have for new or ongoing CWIS managers to improve any of the following application quality and usability, how to control stakeholder expectations, how to manage vendor relations - relationships or any other aspect that you may want to provide advice to us?

Joe Vastola: Sure. I think so much of what we can do as child welfare managers to basically increase the value of our system is linked to some of the things we've talked - we just talked about.

So for example feedback a consistent and effective feedback loop maintaining one from the users of the system.

Often times we work - I know here Florida we work directly with managers of teams and really it's the folks in the field who know how these systems are used.

And so we've got a lot of benefit here from working directly with those folks who have to use the system and understanding their challenges.

Sometimes they reflect issues with the system and how it's used but don't necessarily equate to some of the changes we've been asked to make to the system.

So I think with the perception let alone the reality of quality and effectiveness of your system is basically how effectively it works for the people who use it.

And so it's important - you can't ignore management goals certainly we all know that would be a dumb thing to do as managers of the system.

But we risk the, you know, the issues of not understanding how the system is used if we don't have that link back to the users. And that we don't foster the importance of that link.

I think in line with my comment around well-defined processes. We roll these things out from a technical standpoint and, you know, I'm a technical manager at heart. And so if the systems running, its working, and I'm happy I don't have a lot of help desk tickets.

But the fact is we need to really look at the processes that we've rolled out here. Here in Florida we've had some real significant attention with our management team as we start to look at what's been put in place and we start looking at refinements that help that are basically presented in the manner of what we can do to be more effective and what we can do to save.

And savings can be in the form of cost rarely but mostly in time. And that's, you know, that's what our users really look at. How much time does it take to use the system?

We're well past the point where our users now realize that a child welfare system demands their time for input and that the data is important.

But we do need to constantly challenge ourselves to see how we can refine those processes and save them time and using the system putting them in front of families more.

So I think that maintaining a constant, you know, pressure, you know, a little pressure on the gas pedal to keep looking at these things.

Go back to for us, you know, our - we probably implemented in an order that would be not surprising to you we implemented our hotline intake function first, and then went to CPI, and then on to, you know, the Child Welfare Services.

And so it was years after we implemented the hotline that we actually got back and asked them how it was working.

And so making sure that you've got that feedback loop even if it's - even if it results only in definition of activities that you can complete in the future when you have funding our resources to gain refinements.

But we found that management is always receptive to increased efficiencies and savings and time. They're immediately interested if you can identify cost that cost savings that's certainly not as easy but they - that gets their attention.

I think what I like to call a data investment. The end result of implementing a whole lifecycle child welfare system is just a pile of data. And it's all sitting there waiting to be converted into information.

And so making sure that your teams and, you know, the folks who are responsible for that system yourselves included really know the data that's available.

So many times here I mean there's so much in our system like with many states, you know, we'll be asked to go do something the first question is is it in our system? And we've got to go look and see what do we have in the system? Is that there? Is a correct?

And so I think always benefits and value can be derived in both the system if as a child welfare manager you're maintaining that understanding and relaying what's there. But sometimes the knowledge of what's there will spur ideas on how to leverage it.

I think a level of evangelism. And I got this idea as I've worked with vendors for solutions, software companies, you know, they have evangelist for their solution.

I think child welfare systems that are in place for a long time require an evangelist. Someone who knows the system, knows the practice, and is consistently working to help the organization maintain a focus on what it can do in some cases and what it can't do? How it can be leveraged.

And I think, you know, pressing our teams who are managing and supporting these systems to make sure that they're working as evangelists effectively knowing the system, delivering that constant view to their customers is very important.

And then I think lastly what we've found is, you know, again when we finish our project we kind of packaged up and put on the shelf all of those important project processes and, you know, all of the elements that made an implementation successful.

And I think you're - we're all well suited to keep those project skills sharp. Make sure that we're leveraging those skills as we do maintenance or as we plan for projects.

Make sure we're not having to restart, you know, project processes and elements that we, you know, they may be in our back pocket as we don't do large projects we're ready to fire them up at a moment's notice. I think that continues to show value of what you're capable of doing with your system.

And then maybe just one more point. I think if, you know, we work with our federal partners who are very invested in states getting this whole complement of function in place for child welfare systems.

And what we've found here too is in working with our federal partners and figuring out ways to extend how you apply these child welfare systems for new ways and new ideas we found that - we found them to be very receptive to, you know, ideas and leveraging this beyond what we've put in place. So making sure you've got that open line of communication and sharing ideas is important too.

Joyce Rose: Right. Thank you Joe. Brady?

Brady Birdsong: Thanks. Yes I really agree with everything that Joe's said. And as I was rereading the notes that I jotted down about the advice that I would have for new or ongoing managers I realized that I was probably really focusing in a lot on controlling stakeholder expectations.

And I'm not sure if it's actually controlling but it's just really working with stakeholder expectations.

And one of the things that I have learned over time and maybe it's because I needed it too is how to translate the technical sort of language and the work that we do to translate that into something that's understandable and assessable to our stakeholders.

And I'm thinking primarily of really the folks who are making the decisions of about what this - what goes into the SACWIS right when we're - especially in maintenance but you're making operate - your making changes to the system enhancements based on practice changes.

And if other folks are on the phone are like the district, you know, at times we're making a whole lot of practice changes at one time.

And it's impossible to keep up with it in your system a lot of times with the rate and the pace of change that's going on in practice.

And so, you know, some of what advice that I would give is to really work with your stakeholders in helping them understand the technology and what it takes to do your job as an information systems manager.

And I am a big fan of using analogies because it really works for me to understand something especially when somebody is describing something using a lot of technical jargon or using acronyms or other things for me to try

to make sense of it I'll take that turn it around back into an analogy that make sense to me. And hopefully it works or, you know, they'll say no that's not really quite right or it is quite right.

You know, I think the other thing is that's really worked for me in the district and for the managers that preceded me is to really understand the practice and not just approach the work that we're doing from a technical perspective but to really understand the practice of child welfare and to care about child welfare.

I mean I think everybody cares about that on some level. But to really understand that the technical solutions that we're putting in place are meeting a need to really serve children of families better.

And I think one of the things that that's done is we've - as I've learned that and expressed that and it's got me a seat at the table.

And folks understand the importance of well so Brady may be the CIO and the SACWIS manager but he understands what we're doing and can sort of translate that into the technical - what we need to do technically.

And I think one of the other things that our shop here in the district has been fundamental is again is getting a seat at the table by doing by bringing something to - a benefit that's not really technical.

And, you know, it's - in IT shops we do a really good job and we have to do a really good job of - of breaking down processes into components to figure out how do you automate that and really understanding if this happens then what's supposed to happen next.

And that skill set translates really well into understanding business processes and putting together business processes for perhaps practice changes.

And we've found that over years in the district that that's sort of fallen upon our shop and if you don't have as maybe a shop in your agency that does that.

We've been called to the table to say well help us think through how this business process would work.

And I think so sort of breaking ourselves out of any type of box that seems very limited to IT again in the long run benefits us in the work that we're doing from the IT perspective.

I think another thing that is very important to me and what I try to make sure my staff understands is again that the work that they're doing has an intrinsic value to it beyond just getting a job done.

That we really are helping social workers - hopefully we're helping social workers help the family and the children that they serve.

And, you know, I live in the district work in the district. And so I - the reality is that I'm seeing some of the families.

And I go to church with some of the families that we're actually serving. And so it's important to me to know that the work that I'm doing actually has an impact a direct impact with people.

So I think, you know, one of the other things - and this is really along the lines of what Joe was saying too but is really building things that the social workers need.

And understanding from the frontline perspective what - how the SACWIS or your information system needs to operate, how you really translate a business practice into operations in a system.

And, you know, you can't really do that when you're flying at a 35000 foot level. And then, you know, really seeing that to know how to put - to use an analogy know how to put the wheels on the garage you have to get the folks who are on the ground to really understand if something's going to work or not and is it going to work the way that they need it to?

So those are the things again I think - and just thinking about as we're managing, you know, it's really important to get the stakeholders to understand what it takes to do the work they we're doing.

And then it's really important for us to understand what it takes for the social workers to do the work that they're doing and how can we build solutions that assist that?

Joyce Rose: Joe and Brady I compliment you on the information that - and your experiences that you have provided. And you both have brought certainly the human element into these massive projects that we undertake. And again I thank you so very much.

I think now we will move on to our Q&A attendee Q&A section. Do we - we're going to un-mute phones as I understand it?

Elizabeth Mertinko: (Mary) your operator will have folks queue up. Yes so (Mary)...

Joyce Rose: Okay. So Joe, Brady and myself are going to collaborate any of your questions or responses to any of your questions. And please feel free to specifically direct a question to any one of the three of us. So here we go.

Coordinator: Thank you. We will now begin the question and answer session. If you would like to ask a question please press Star 1.

Please un-mute your phone and record your first name and the state you're calling from when prompted.

Your name is required to introduce your question. To withdraw your request you may press Star 2. And it'll be one moment for our first question please.

Elizabeth Mertinko: We do have a question that came in via GoToWebinar while we're waiting for people to queue up.

And I can tell even with my somewhat limited knowledge of the subject that this is not a quick answer but how do you gather requirements for your project?

Joyce Rose: Joe, Brady?

Joe Vastola: Yes. Yes this is Joe. I'll take a stab at a first.

Joyce Rose: All right.

Joe Vastola: I mean basically we tried we applied - tried true methods. We get our - the experts in the room, we got our vendor in the room, and we worked through since our system is implemented we worked through requirements but we focus mostly on how the system is changing.

So it's a little different from when we implemented because we do tend to look for, you know, not only the things that are changing but, you know, part of the goal here was to, I'm sure with all states is, to maximize the money that we've got to spend.

So requirements in some cases have taken a little different twist because you - we talk more about options in some cases than we would have when we were implementing.

So the approach with stakeholders is tried and true. You find the best experts that you have that use the system or that, you know, guide the policy and practice of it.

We put them in a room with our experts both vendors and our state staff who know the system and we try and work out what are the, you know, the 80% of what's needed that we can afford and the best way to do it in the system.

And like I say we work a lot on what are the options? I think there's an increased level of dependence given we're at - given the point we're at in the system on the team to offer options.

So we've tried to prepare before going in with, you know, what are the ideas that we've got different ways we can use the system.

And so I have to admit that our requirements process is a little different in that the outcome is the same.

We come out with as much detail as we can that we can take into a design and have a business level estimate to advise the management team of.

But it really takes on the approach of what can we do within the timeframe, within the funds and how do we maximize those.

So I think that that's absolutely right too. I backup a little bit though from the starting place and I say what I've really learned over time too is I sit down with the stakeholders and I say let's not even talk about the system right now.

You tell me what you're trying to accomplish? What is this practice change? What is the business process behind that?

You know, I even goes so far as to ask people like don't - just think about this if you were doing this on paper what would need to happen to get this accomplished?

And because I think, you know, myself included but even the users of the system get very wedded into the is it possible with given what we've got.

And I think that that can be really limiting in getting true requirements because like I really want folks to think just about their business process because, you know, it's - you get into child welfare agency they're not implementing technical solutions they're implementing business practices to better support the work that we do.

And I see my role and my staff's role is to as Joe said is you give us your business process, talk it through, we'll come up with the technical options and solutions that there might be to that problem that you're trying to solve and how you want to solve it.

Joyce Rose: Yes I think there is a - there is often times the rush to defining how to do something as opposed to taking the very first step and telling us what do you really need and we'll come up with the how to options.

Joe Vastola: Yes. I agree.

Joyce Rose: Another question?

Coordinator: I'm not showing any questions from the phone lines.

Elizabeth Mertinko: Okay. I don't have anything on GoToWebinar so (Mary) if you could just remind us again how to queue up for questions?

Coordinator: Yes. Once again if you'd like to ask a question please press Star 1. Please unmute your phone and record your first name and the state you're calling from. It is required to introduce your question. To withdraw your request you may press Star 2.

Joyce Rose: So while we are waiting for someone from our attendee list or our attendees to submit a question gentleman I have one for you.

Knowing that you both have on your respective projects employed major - system integrators or vendors sometimes multiple vendors in your estimation or in your view what was the single most important key or thing that you did in order to create a positive and productive vendor relationship not only between yourselves and your copartner on the vendor side but between the vendor teams and your teams?

Brady Birdsong: This is Brady. So I'll take the first stab at that. And I think I mean I think one of the things is with our vendor we've - have a very team and partner approach.

And I think it's just really maintaining that is that this is - I mean, you know, there - that ideally you're approaching this from we're in this together right? And not its adversarial or not they hey, you know, we were circling each other with suspicion.

But it's just like, you know, we've really got a goal here and a project and an objective that hopefully are the same.

And, you know, to implement the best system as possible but to really that we are in this together to help come up with solutions that benefit children and families in the District of Columbia right?

And I think when you sort of have that approach and you really are doing something that has a value beyond just this work that I think that creates sort of a common ground and a partnership there.

And also I mean I think that the idea is that this in the end should be a win-win situation for both of us. And understanding that the vendors are in this, you know, this is how they make their living, this is how they make their profit, or one of the ways that they do that is, you know, you don't want to not be successful on this project because you're going to go and try to get other projects. And so, you know, I think understanding again that these need to be win-win situations.

And the other thing is it's just got to be fun to some degree right? You have to have an environment in which it's actually fun to work in.

And that benefits my staff. And it also benefits the relationship with the vendor. And it benefits our stakeholders too right?

I mean child welfare in and of itself by nature isn't really fun work but you can make the work that you're doing here again a nice environment to work in.

Joyce Rose: Absolutely. Joe do you have any advice?

Joe Vastola: Yes. I think I tell this to the folks who come to work on our system and I've found in my experience the best results that we've achieved in partnership with our vendors has come when I've understood that I kind of ride to defense right?

So I've got the department as I manage these systems on one side. I've got the vendor on the other and neither can, you know, achieve the goals like Brady said without one another and without working in partnership.

But I've found that, you know, when both sides of the fence know that your goal is to make it work right which sometimes means you're creating happiness on one side of the fence and, you know, less than happiness on the other that you're helping to drive things forward.

And so I think as a child welfare systems manager I've found where I've achieved with my vendor their knowledge that I'm going to press for what they need to be successful and help communicate it and with my customers press for what they need.

And sometimes, you know, just bridge the gap where when you reach that point where sometimes the, you know, the needs from both sides of the fence are incompatible and bring people together.

So I think, you know, you have to be a catalyst. And when you walk one side of the fence or other you can't be successful you just have to walk on the top of the rail.

Joyce Rose: Absolutely. Thank you. Do we have any questions from our attendees?

Coordinator: I'm not showing any questions.

Elizabeth Mertinko: Okay. I have...

Joyce Rose: Okay

Elizabeth Mertinko: ...one GoToWebinar. Once requirements are gathered how do you manage or revise your documentation?

Joe Vastola: Yes this is Joe. What we've done its actually worked quite well where we've maintained the discipline and that is we've - the output of our implementation of the system is basically the documentation for the system.

Now obviously we've got business documentation and we've got system documentation that we use that's very technical.

And so what we've tried to do is every time that we define some new functions we're always going back to those original implementation documents that we've been updating as we've changed the system and keep them fresh.

They are not only our documentation for capturing the requirements definition and what's changing but they're also built to be documentation for the system.

So we learned a long time ago we didn't have the capacity, you know, or in some cases the attention span to maintain this separate environment of documentation.

So we've kind of molded our requirements and design documents into what is the system documentation.

Joyce Rose: Excellent Brady?

Brady Birdsong: I hesitate to answer this question because I - but I do think that that's actually one of the biggest struggles I think we've had and not in the baseline

documentation of the requirements but it's anytime I think you get - you start getting into design and then development and through you're testing I've never - even if that was the simplest seemingly change there usually is always some altering of that down the road.

And documenting that from here was where we started with the requirements to here's where we ended up is admittedly has been a struggle here.

And I don't think it's led to any really long term problems but it is one of the things that I always am conscious of that we need to do better.

And so I think it's - I appreciate Joe's response because I'm - I was listening intently to see now that's maybe we need to think about doing here too because it's so important.

But it is one of the things it's a very hard thing to discipline yourself to do especially because once you're rolling in the development I found it's really hard to stop and go back and focus in on documentation or documenting changes.

Joyce Rose: Absolutely. Trying to go back and catch up with documentation is an immense challenge and often it just doesn't work.

Brady Birdsong: Well let's just admit for me it's just not fun.

Joyce Rose: Absolutely.

Brady Birdsong: I'm like I want to keep looking forward. And going back and redoing documentation is just a lot of times feels like a backward step even as important as it is.

Joyce Rose: A big challenge but definitely a necessary evil.

Brady Birdsong: Absolutely.

Joyce Rose: So given that we don't have any further questions I think that we will...

Elizabeth Mertinko: We actually do. We have one more.

Joyce Rose: Oh good.

Elizabeth Mertinko: They keep shackling in via GoToWebinar. And it got a little bit cut off but I think the gist of the question is asking Brady and/or Joe to talk about incorporating data quality plans into your work?

Brady Birdsong: I'm - I would ask the person that asked the question what does exactly they mean by data quality plan because I think that's another thing that, you know, we do at a certain level but it's data quality to me is really something that the bailiwick of folks who are managing the social workers right?

And it's a quality question to me is the data that's being put into this system is it accurate which your IT folks aren't usually going to know.

I don't know how they would know. But so that would - yes I would want to know exactly what's meant by the question.

Elizabeth Mertinko: Okay.

Joe Vastola: This is Joe. Data quality for us it's actually been a very interesting challenge. And we've kind of approached it from two categories.

One is where you don't pay enough attention to it and then you realize you don't have quality. And then the other one which is really the prevailing way that's working now that we seem to be getting good results in because again back to the point around there's so much data in the system, you know, I'd be surprised if any state can afford to have people just looking - and looking at it and monitoring it. And I - and states that had those resources in place I'm certainly envious of. We don't.

So our quality activities have to occur while we're executing the business processes associated with getting the data in and using it.

And what we've found is particularly under Secretary Wilkins right now is there's a significant management focus on metrics and dashboards for our practitioners, for our outsource providers and for our internal staff.

And so where you monitor, measure, and produce reports we tend to have better quality data because everybody wants their information and their metrics to be, you know, to reach the level that's there.

So what we've found is that management approach can certainly have a very important impact on data quality.

The other example I can give you is really, you know, the pass off that all of you would understand between information that flows from intake to child protective investigation.

We've had a lot of challenges here around what is a case? And what's the right case to attach a new intake to.

And what we've had to do is at this point institute resources that are constantly watching our cases to make sure that the right intakes get to the right case. We've had a lot of trouble for quite a while after we implemented in bridging that gap.

So we've found there that identify the resources that monitor and manage are really the front end to our quality data management plan because everything starts at intake and flows from there.

Brady Birdsong: So I have a couple of additional things, you know, I think Joe is right it's hard to have the staff to really do data quality and reviewing of the data but being in the district and the state defender a consent decree one of the things that we're realizing and - right now is if we don't do it internally the court monitor will.

And they will find the data inaccuracies or the questionable data in their review. They have the resources that can come and do some in depth reviews. And that is - that creates a huge barrier to exiting the consent decrees.

And I think another thing and on another just a different thought about this question though is, you know, we've been asked a lot of times by people well can you make this field mandatory or can you make it mandatory that a bond somebody doing a placement change that they have to update the education record?

And that's been a specific one that's come up a number of times. And, you know, the thing I just would just say is well we don't want to shoot ourselves in the foot.

It's important to get education information yes but is it would that also lead to a barrier of getting people to update placement information timely because maybe they don't have a new education information and there's no reason to update the education screen.

So I think it's, you know, there is some of that data quality question as folks say well we want this data in this system can you make sure or tie it to something else?

And I think we want to be really cautious about that because you have to realize that sometimes it could have a consequence that you didn't expect or not the consequence that you actually wanted.

Joyce Rose: Thank you so very much. And I think it's time now that we move to our wrap up. So let's move to today we have provided a basic review and refresher of

some key CWIS project manager competencies and commonalities touching on both personal, business and leadership and technical competencies.

We identified both internal and external stakeholder expectations, reviewed a bit about team dynamics and how and why they work.

And we moderated I believe an excellent discussion providing tips and information from our guest presenters as well as the attendee questions and answer session.

So what's next? We will follow up regarding any questions that may come in via email or any other method.

And I want to remind you of the next Webinar which is part one of the project lifecycle scheduled for mid-May. Please watch for specifics.

Again this Webinar has been recorded and will be made available online when it is complete and posted. We will send a message via the SACWIS Managers Listserv with the link.

I want to thank you for attending and thanks again to our guest presenters. Goodbye.

Coordinator: Thank you for your participation on today's call. The call has concluded. You may disconnect at this time. Thank you.