
MEMORANDUM

Legislative Fiscal Office
900 Court St. NE, Room H-178
Salem, Oregon 97301
Phone 503-986-1828
FAX 503-373-7807

To: Human Services Subcommittee
Joint Committee on Ways and Means

From: Joint Legislative Committee on Information Management and Technology

Date: February 12, 2016

Subject: Department of Human Services Integrated Eligibility Determination Project
JLCIMT Recommendations

The Joint Legislative Committee on Information Management and Technology (JLCIMT) recommends incremental, conditional approval of the Department of Human Services (DHS) Integrated Eligibility Determination (IE) Project request assuming the funding, spending authority, and personnel resources are made available to DHS by the Joint Committee on Ways and Means. The JLCIMT recommends that a plan be developed to unschedule the requested expenditure limitation and, DHS be required to request and receive the Department of Administrative Services (DAS) Chief Financial Office (CFO), Office of the State Chief Information Officer (OSCIO), and Legislative Fiscal Office (LFO) approval that a portion, or all of the remaining unscheduled expenditure limitation, be rescheduled for the agency use to initiate and complete project planning and execution activities. The JLCIMT further recommends that, in support of any rescheduling expenditure limitation request, DHS undertake the following actions:

- Clearly document progress on the remaining outstanding Stage Gate #3 foundational documentation on the IE Project, and develop a detailed plan and schedule for completing all required documents (and quality control reviews).
- Regularly report to OSCIO and LFO on the progress on the foundational documentation and quality control reviews of each. If adequate progress is not observed by both OSCIO and LFO, DHS may be requested to report to interim legislative committees.
- Provide all key documents to OSCIO, LFO, and to the Independent Quality Assurance (QA) vendor (for quality control reviews, which must be completed prior to the OSCIO's Stage Gate #3 endorsement).
- Work with OSCIO and LFO to finalize a mutually agreeable detailed incremental controlled funding release plan that is initially based upon completing all remaining foundational documentation deficiencies and Stage Gate #3 requirements prior to beginning the "execution" phase of the project.
- Work jointly with OSCIO, and LFO, to develop a long-range plan and budget documenting by whom, and how the newly implemented system will be supported and operated once installed. In particular, this plan should include details on how the new system would be transitioned to state support and operations staff, including any necessary training plans and related activities required to transfer the necessary business, maintenance, and support knowledge from Deloitte support staff to state support staff.
- Regularly report project status to OSCIO and LFO throughout the project's lifecycle.

- Continue to follow the Joint State CIO/LFO Stage Gate Review Process.
- Hire, appoint, or contract for a qualified project manager with experience in planning and managing programs and projects of this type, scope, and magnitude.
- Work with OSCIO to obtain independent quality management services via an OSCIO established contract. The contractor shall:
 - Directly report to the OSCIO which will be responsible for the review, approval, and payment for all quality assurance and quality review deliverables.
 - Conduct an initial risk assessment and respond to OSCIO, LFO and DHS feedback.
 - Perform quality control reviews on the key IE Project deliverables including the detailed business case, individual cost benefit/alternatives analysis documents, and foundational project management documents as appropriate.
 - Perform ongoing, independent quality management services as directed by OSCIO.
- Provide both OSCIO and LFO with copies of all QA vendor deliverables.
- Work with OSCIO and LFO to conduct a formal readiness/ability assessment at Stage Gate #3 to validate readiness and ability to proceed to the execution phase of the project. Legislative approval to proceed with the IE Project will be dependent upon OSCIO and LFO concurrence that DHS is both ready and able to initiate project execution activities.
- Utilize the Office of the State CIO’s Enterprise Project and Portfolio Management (PPM) System as it is deployed for all project review, approval, and project status and QA reporting activities throughout the life of the IE Project.
- Complete a formal “project close out” report upon completion of all project phases.