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## The Agile Issue

Is California  
Ready for Agile  
Development?

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Printed in the USA

A division of e.Republic



Bill Maile, Editor

# Is Agile the Answer?

Every time legislators at the state Capitol probe the aftermath of a failed IT project that goes off track or over budget by tens of millions of dollars, pressure increases for state officials to be smart with taxpayer-funded technology designed to support state programs. Not surprisingly, the executive branch is beginning to explore an entirely new approach using the same methodology that rescued the federal government's disastrous HealthCare.gov website — agile software development.

Last fall, the Office of Systems Integration announced that it will develop a new child welfare case management system using agile methodology. But is the government ready to abandon its conventional “waterfall” approach where managers start with a complete and documented budget plan to design, develop and implement? Most experts we talked with said no, but that should not stop officials from moving forward, because it's a risk worth taking.

Agile proponents say there are a lot of myths about their approach, which started in the late '90s, such as having no discipline or documentation. One major difference from the waterfall method: Agile does not include a complete blueprint before the project starts.

Instead, project executives start with big goals while managers and coders work in teams to rapidly develop and test smaller components, while seeking feedback from users. So-called sprints can last from two to four weeks and are

repeated often. With high energy and numerous team meetings, the scope and requirements are flexible until a viable project is launched with the intention to iterate often and improve along the way. The experts argue that their approach actually improves discipline and ultimately reduces risk, budget and time.

Agile critics say state agencies should not start without a complete budget plan or commit taxpayer resources to a project that has not been fully defined. The state also lacks existing procedures and in-house expertise, although the State Training Center has recently started offering professional classes in agile development.

A generation of state IT professionals, contract managers and administrators currently use the waterfall method. Because these professionals know better than anyone else about the services they provide to the public, perhaps the biggest hurdle to introducing this new approach will be cultural. A potential clash between the new generation of agile practitioners coming into the state with the goal of teaching the establishment some new tricks will no doubt offer insight into why it is so difficult to develop large government IT projects.

After talking with more than a dozen experts in both the public and private sectors, the TechWire team examined a number of different perspectives on what will surely be one of 2016's hottest topics. As always, I look forward to your feedback. ●

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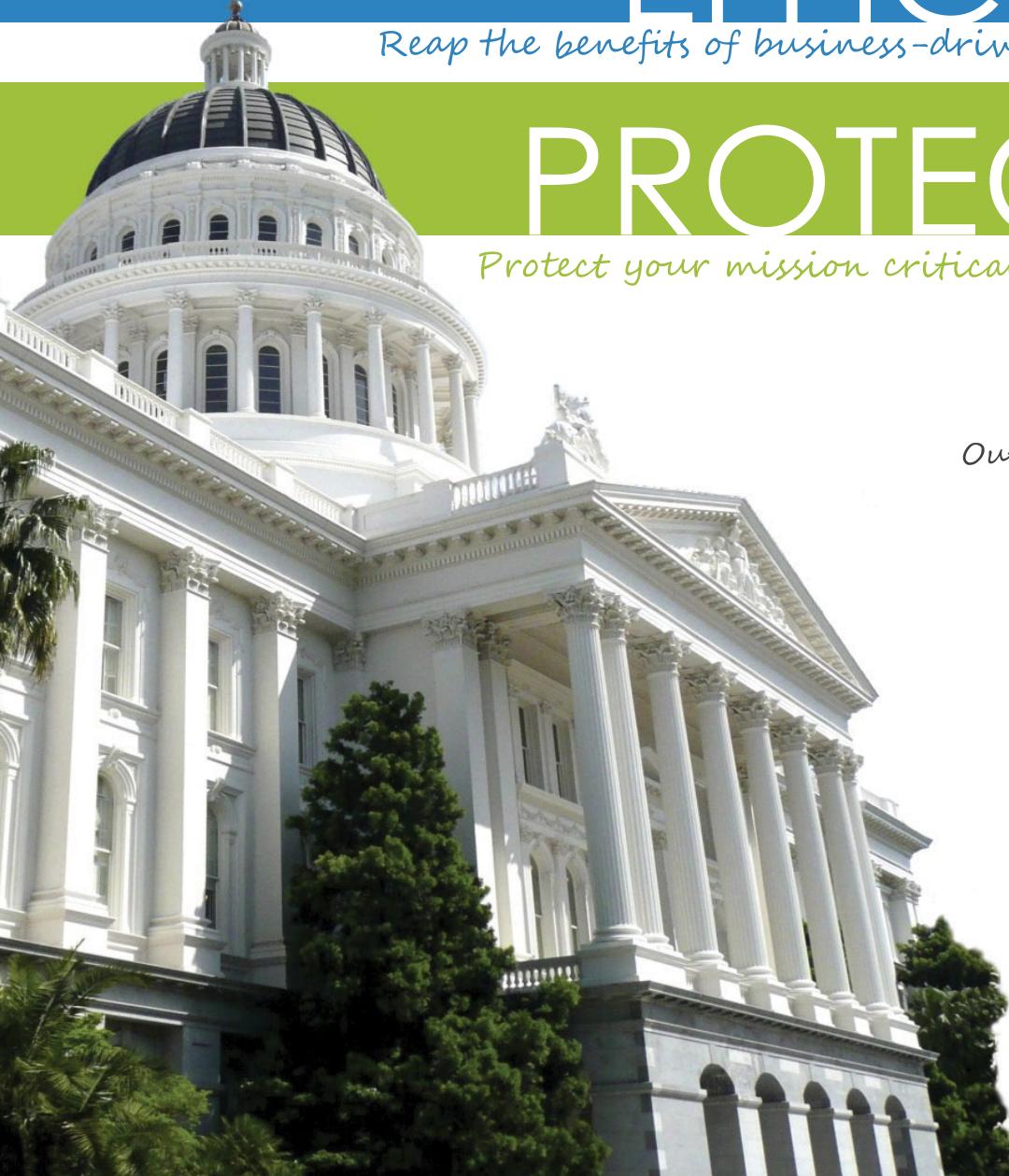
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**PATRIOTS**  **HONOR**



A small but spirited revolution is underway in California's information technology arena.

BY DORSEY GRIFFITH

# THE AGILE INGREDIENTS

**W**ith the recognition that the traditional, top-down, monolithic approach to revamping critical software systems is prone to costly failure, a cadre of innovators is moving swiftly to take a different tack on a single, high-risk project: overhaul of the technology that runs child welfare services. The demonstration project will develop and integrate functions such as intake, licensing, eligibility, court processing, financial management and administration of case management. They are using what is called an “agile” approach.

While agile management of IT projects is a familiar model in the business sector, it represents a vastly different approach for states like California, which have wasted millions of dollars on failed software development projects in recent years. Its proponents argue that agile is less costly, quicker to implement and more effective because it’s done through customer collaboration, breaks projects into digestible parts, maintains flexibility to allow for changes and tests the product early in the development process so that poor performers are rejected and replaced.

Marybel Batjer, secretary of California’s massive Government Operations Agency and a key player in the demonstration project, is almost giddy with enthusiasm about agile’s potential application across state government entities with different service demands.

“I would love to be very successful very quickly with agile methodology,” she said. “When California is successful at something, it usually burns quickly across the country like a wildfire.”

But with California’s vast bureaucracies responsible for managing everything from Medi-Cal claims to automobile registration to state employee payroll, will a move toward a more agile approach be akin to turning the *Titanic*?

Mark Layton, author of *Agile Project Management for Dummies* and founder of a company that helps businesses move from traditional software development to agile, said eventually all industries, including government, will adopt agile approaches as a matter of survival.

“Because of the state’s historical failures, agile isn’t a choice,” said Layton, who has a contract with California to help fix problems associated with its stalled \$1.7 billion deal with Xerox to develop

and implement the state’s Medicaid Management Information System. “It’s not a question of if the state moves to agile, but how smoothly they do it.”

The agile model was created in the 1990s to replace the “waterfall” model of software development, a World War II procurement approach when computers used just a few dozen lines of software code. As its name suggests, waterfall is a software design model that flows downward through phases of conception, design, construction, testing, implementation and maintenance.

Waterfall uses a “defined control method,” in which everything is outlined and then executed around that plan. It’s a risky approach, Layton argued, because collecting the software requirements can take so long that by the time they are approved, the requirements often are obsolete.

“If it takes you six months to start cutting code, you’re dead in the water,” said Layton. “You are applying a static approach to a dynamic process.”

With the traditional model, testing is put off until too late in the process, he said. “No one knows how many defects they will have in a future

system because you don't get exposed to them until you have run out of time or money to do anything about it."

Agile caught on with the commercialization of the Internet when software applications evolved to require hundreds of thousands of lines of code. Early adopters were companies requiring fast "time to market" delivery of business products. Layton said using this more empirical model of software development begins with a high-level, holistic view of what the customer is trying to achieve, and that allows for flexibility to change system requirements early in the process when they are easier to fix or scrap. Development cycles are "iterative," in that the team works in short time frames or "sprints" to plan, analyze the requirements, design, code, test and demonstrate the product for the customer.

Batjer acknowledged that agile represents a vastly different approach for California.

"We take these very complicated things and ask vendors to come up with solutions, and 10 years later we may or may not have a successful solution," she said. "When a monolithic project doesn't work, how much frustration are you causing to the end user and the public you are serving, and how many millions of tax dollars are you wasting?"

In contrast, Batjer said that because agile breaks projects into smaller, more manageable pieces that are not interdependent, you can "fail fast and move on."

She added that projects created using agile are more likely to work because by design they engage the people who will ultimately use the product.

"The person who really needs it — the social worker who is trying to better the lives of children — is right here with you at the table," she said. "The end user never leaves."

As the person who oversees the state agency that includes information technology, general services and personnel, Batjer said that for California to employ the agile approach on a larger scale it will need more people who both understand agile methodology as

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well as how state government works.

"Our board of directors are the state Legislature and the governor, and their bosses are the voters," she said. "I want people talking to me about new processes in government who know something about government."

By the same token, Layton said government's adapting to agile presents "a fundamental challenge to the power structure of the status quo" and will require new team structures that are flatter, less hierarchical and more flexible in terms of the roles of each team member.

Kevin Gaines, chief of the Child Protection and Family Support Branch at the Department of Social Services, is a lead player in the child welfare system demonstration project, whose role is to ensure that the planning, execution, testing and delivery services address the needs of the end users. Although he is an enthusiastic booster of agile, he's realistic about the challenges it presents.

"I am of the mindset that we are trying to fit a round peg in a square hole because the work we are trying to do lends itself to monolithic projects," Gaines said. Such projects historically have created a gulf between the people who write

the code and integrate the services and those who use them. "User research and design is a brand-new discipline for us."

Gaines also acknowledged that acquiring the technical expertise needed to use agile more broadly will have budget and collective bargaining implications, but will nevertheless be necessary.

"I am hellbent on getting technical assistance from private industry to help us build capacity in-house," he said.

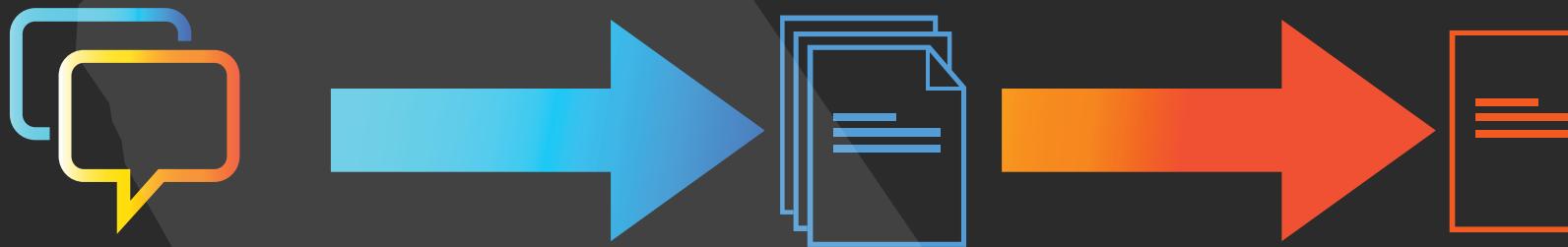
Still to be determined is whether state officials will accept accountability when an important IT project fails, rather than keeping an arm's length and blaming the business partner that holds the contract, which has been the traditional scenario, Layton said.

"Who wants to be the first executive in the state to say, 'Yes, I am responsible for the failure of this project?'" he asked.

Those involved in the child welfare demonstration project say they are ready for that challenge, in part because with agile, no single failure will doom the entire project.

"When we fail faster, we correct faster," Gaines said. "To the extent this helps us evolve to get the expertise needed to manage our own destiny more effectively is a really a good thing." ●

# Is California Ready for Agile Development?



Experts agree that California lacks expertise and faces a culture clash, but officials have much to gain by moving forward.

**By Matt Williams**



One could argue that California is diving into the deep end in its attempt to use agile development instead of traditional “waterfall” project principles that are much more common in the public sector. Executives leading the Child Welfare Services — New System (CWS-NS) project are eager to work iteratively on small modules that can be put into the hands of state and county workers in a matter of months instead of the several years it takes for a “big bang” release. Project managers hope the approach will be less risky and more responsive to the changing needs of customers.

But agile development truly is a sea change for the state's people and processes. California has completed hundreds of projects where every detail of a procurement is written and defined up front, and only then would system development proceed; meanwhile, the state has used agile processes — focusing on delivering workable products at the beginning — only in small pockets within a few departments and typically for smaller deployments. It raises a simple question: Is California ready to do this?

The answer — like those to so many complicated questions — is nuanced, and probably not a concrete yes or no. The state knows it needs to develop more expertise in-house on agile among the state workforce and is taking steps to make that happen. And the rules, regulations and processes that govern procurement in the public sector might be stacked against agile. But the fact that California is moving toward agile could be enough in itself, and a lack of skilled practitioners shouldn't be an insurmountable obstacle, proponents of agile say.

"Does California have the people it needs to do agile? The answer is that they're aware that they don't, or that they don't have enough of them," said Dan Hon, the content director of Code for America, the national nonprofit that is advising California on how to implement agile for CWS-NS. "The only reason why they feel able to proceed is because a viable alternative has been presented to them with the appropriate level of support, reassurance and teamwork going on." Hon is temporarily attached to the federal government's Administration on Children, Youth and Families, which is assisting California on CWS-NS. The U.S. government's 18F service delivery group also is advising.

"As an external observer, hardly any governments, California included, have enough internal capability right now to successfully execute upon [agile]," Hon said. "What I've definitely found is that there certainly are people who can execute this, but it hasn't been required to be a core competency, so then you wouldn't expect the capability to exist in the first place."



**“**As an external observer, hardly any governments, California included, have enough internal capability right now to successfully execute upon [agile].

*Dan Hon, content director, Code for America*

The good news is state officials seem to be aware that California agencies and departments need to build competency and do so quickly. John Boule, director of the state's Office of Systems Integration, said during a Dec. 4, 2015, bidder conference for CWS-NS that the state knows it needs to build skill sets and knowledge gaps within the government, and is working with federal partners at 18F to do that. The California Department of Technology recently began offering training courses on agile, lean development and scrum master certification for iterative development. "Competitive pressures demand that project teams use development methods that enable early achievement of value rather than the traditional approach that may require months or years before expected benefits are achieved," the course description says.

California also knows it must adjust its contracting and regulatory processes. Alex Chin of the Department of Technology's Statewide Technology Procurement Division said the state's contract vehicles and terms and conditions were built for a waterfall methodology, so they must be changed. Chin said Dec. 4 there likely will be some stumbles and arguments along the way, but those contracts will be adjusted.

It's a problem that's not unique to California. "If you're going to do these things really large, in an agile fashion, in a lot of cases the No. 1 blocker in government is the fact that their entire procurement model is based on a vendor-customer relationship when the lowest bid wins," said Ryan Martens, founder and CTO of Rally, an agile development software provider. Last winter Jim Butler, the



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state's chief procurement officer, also said California likely will need to modify its rules for follow-on contracting in order to support new procurement and system development models.

The state also must overcome some cultural barriers, because IT has been conditioned for many years to work within the waterfall approach. Peter Kelly, deputy director of the CWS Division, said he's been advocating for agile as long as he's been working for the state. "There is a different way, dare I say a better way, to deliver value to our customers," Kelly said. "What's really important is that we have early and frequent delivery of business value. And we are going to become agile and nimble," Kelly said with certainty.

He said the state needs to improve its service delivery capability and wants to see constant iteration through two-week-long sprints. Kelly, too, said the state needs to build long-term skills for agile in the government, and that CWS-NS could be the beginning of a transition to "dev opps" and out of monolithic procurements. He wants Child Welfare Services to constantly evolve its technology in the business areas customers need most. There should be a "human-centered" design focus that addresses and fixes the pain points. The goal, Kelly said, is to give something to customers they can use as early as possible, and everyone involved will share the risk. "We'll share a process together that allows us to buy and receive something that is valuable at each and every step along the way," Kelly said.

Hon said the request for proposal the state originally developed for CWS-NS — before its move to agile — was trying to implement agile, but couldn't. "In certain respects it would talk about wanting iterative development; the state ideally wanted iterative development and agile delivery. And I suspect that would be the case for most RFPs in state government that go out of this size," Hon said.

Martens, who is a subject matter expert on agile and used it for more than a dozen years with federal and state clients, said there's growing momentum and enthusiasm for agile in the public



**“ You can add the agility and be reckless, no question; you can add the discipline and slow down to a level where you’ll never, ever ship anything.**

*Ryan Martens, founder and CTO, Rally*

sector, and sometimes what it takes most is the willingness to jump in and do it.

Martens said if California does currently have a lack of expertise, it's not necessarily a deal breaker and can be overcome. He said moving to agile for CWS-NS is a "huge step forward" for California. "I have customers that are measurably 16 times better than they were before. That is a journey, not a destination. That's something you move your way along to become an expert at, and you get incrementally better," Martens said.

The integration phase usually is the hardest part of the process for a big, complex project like CWS-NS, so Martens said under the agile methodology the integration should be done first. Develop little components at the beginning, he said,

and then make sure the system can run end to end. Then put more meat on the bones. California may not like what it sees after the first six months — this a normal outcome of agile, he said — but the state won't be three years down the road, with more money spent, up against a big release deadline that isn't flexible in case a big project component isn't yet functional.

A big misconception about agile, Martens said, is that it's a by-the-seat-of-your-pants, "cowboy coding" process where anything goes. The reality is California and other governments need to go faster with a safety net — an infrastructure that automates releases but supports a testing environment, as well as mechanisms to stop when a module isn't working. "You can add the agility and be reckless, no question; you can add the discipline and slow down to a level where you'll never, ever ship anything," Martens said. Project discipline must be built up alongside agility simultaneously, he said.

For a California team that is more accustomed to waterfall-based procurement and development, Martens said there's no harm in building more time for training into the project schedule if it's needed or slowing down the iteration cycle somewhat until the organization is fully accustomed to agile. Sometimes you have to walk before you sprint. It's still faster than a big procurement, which could otherwise take years, and if done right, Martens said it would still be much cheaper than a waterfall procurement that takes years and isn't guaranteed to succeed.

"The great thing about agile is you are working with feedback, and the feedback can dampen really bad things or it can amplify really good things," Martens said. "If you find a text-based interface to the child welfare problem is absolutely the right thing to change retention and overall usage, great, let's spend more time on that first. Maybe we can bolt that on to the existing system without having to change it." ●

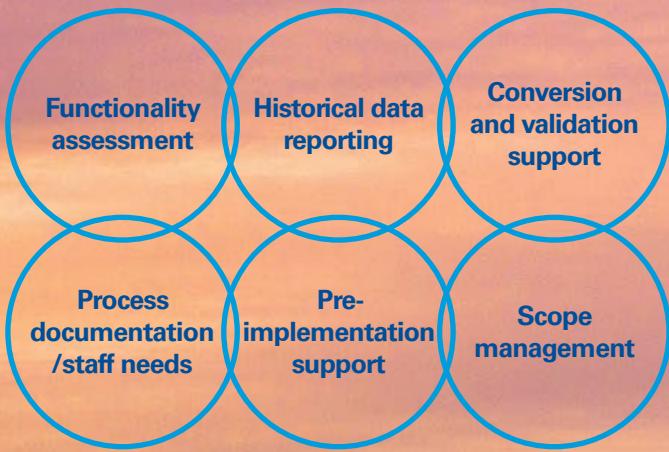


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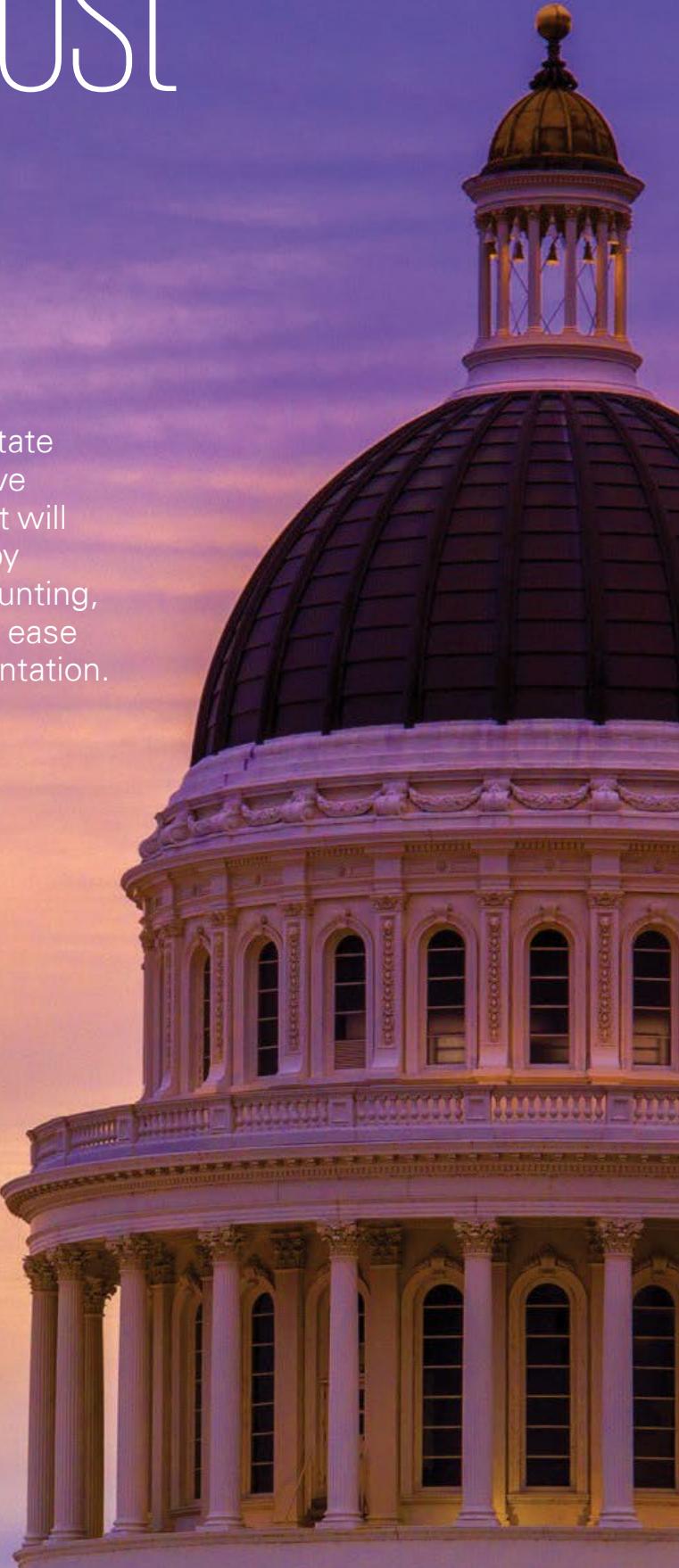
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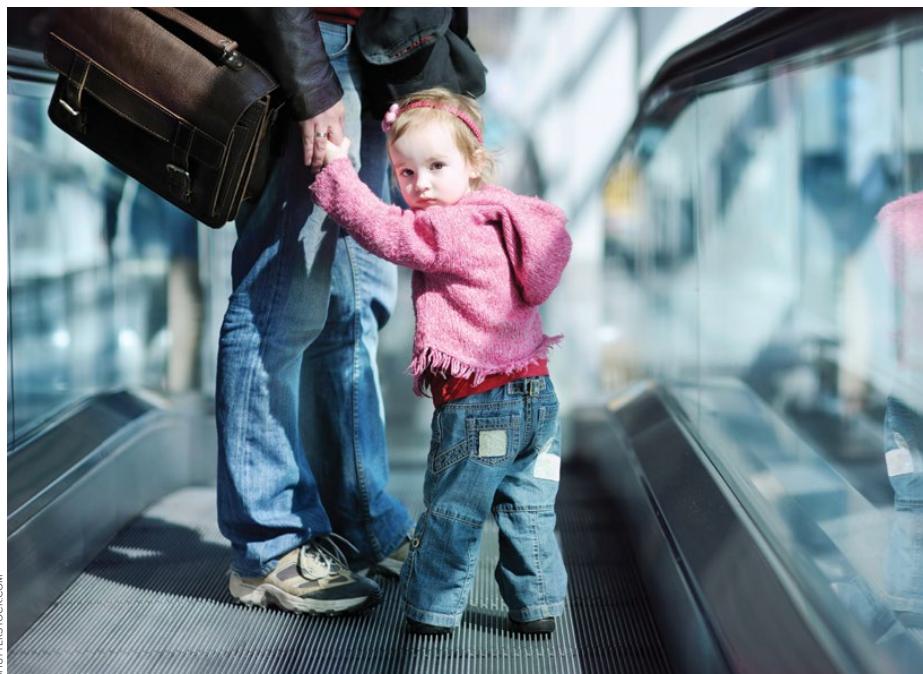


*Shell Culp is a principal with Almirante Partners and the chief innovation officer for Stewards of Change Institute. Her passion for performance improvement in government also makes her a champion of interoperability, open data and organizational change management.*

# Too Important to Fail

Agile presents an opportunity to improve collaboration and trust, but it's not the only way.

By Shell Culp



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If you've been following the Child Welfare Services (CWS) — New System news, by now you know that the state is pursuing agile procurement and software development strategies. A letter to the vendor community just before Thanksgiving hinted at a more modular, phased procurement approach. A vendor conference in early December extended the new approach to choice of software development methodology as agile. Listening in to that vendor conference, I lost track of how many times I heard reference to the idea that this project is too important to fail for California's most vulnerable children. This is a poignant reminder of the beneficiaries of the new system, but I think we shouldn't miss the opportunity to recognize what really is at risk of failure here.

Let's start with a couple of facts. First, there is a system in place already that has

been used for more than 20 years. The primary motivation to replace the existing system has been federal pressure for California to avoid sole-source contracts with the present vendor. A project to improve the competitive climate by moving the hosting of the present application to a state-run data center was completed in 2007 to that end. The CWS ReHost project was completed flawlessly, on time and \$8 million under budget, I might add.

It's also worth mentioning that the existing system is not deemed to be Statewide Automated Child Welfare Information System (SACWIS)-compliant, even as the federal Administration for Children and Families has wrestled over the last half-dozen years with just what that definition actually is. Would the possibility of a new system be an opportunity to move toward more

modern architecture and technology? Absolutely, but if the new system "fails," the old system is still in place and still works, even though it may be ugly.

Second, the biggest improvements to the Child Welfare system, whether it is new or existing, SACWIS-compliant or not, would be the sharing of data between entities, such as courts and social workers that presently does not exist. An agile software development methodology implies agile architecture and the ability to implement technology that can facilitate the person-centered, or family centered, view but does not address the vexing issue of organizational dynamics and change.

We have known for some time that technology is not the limiting issue in sharing information between service silos, the present system could actually accommodate this, with some modifications. Some years ago, the Administrative Office of the Courts sponsored a workshop to open dialog between courts and child welfare programs to tackle this issue head on. Despite the positive conversations that occurred at the event, little to no progress has been made. In such initiatives, we tend to cover the same territory over and over regarding the privacy and confidentiality "barriers" that prevent the sharing of information. In truth, we manufacture these barriers, so we know how to disassemble them; the barriers themselves are far easier to deal with than the cultures that erected them.

With our rhetoric and choice of agile, what seems like a signaling of "no confidence" in the waterfall method of project management and software development is tempered by a revised waterfall approach recently implemented by California's Department of Technology. In spite of the fact that we have applied the waterfall approach to projects badly in many highly publicized instances, the method still serves us well and is appropriate for many projects, and used quite successfully for the CWS ReHost project mentioned previously.

But the waterfall method of project organization and management itself is not the culprit. The real determinants of proj-

ect failures are more insidious — such as failure to recognize appropriate roles and resource them effectively — do members of the project team still have their day job? This situation often manifests in delays in key reviews and approvals. Closely related to this is the failure to understand how projects operate and structure program engagement effectively. This situation may derive from a failure to trust members of the team to make decisions, and to what end? It's incredibly difficult to keep the team engaged when its members have no clear investment. We see this often when the program folks either disappear from meetings where important issues are discussed, or a program executive oversteps the governance process and makes unilateral decisions, or worse, a program executive who countmands the decisions his or her team has made. Closely relat-

ed to this is the failure to avoid too many cooks in the kitchen trying to manage the project, and the developing paranoia that there is a general lack of control, which there is, if you have gotten to this point, and project failure is imminent — a sometimes self-fulfilling prophecy. Perfection is unobtainable, and I would argue, unnecessary, as this move toward agile attests.

Would an agile method fix this? Maybe. There is certainly a temporal aspect that's a function of the design of a "big bang" waterfall approach. But most of this is a function of an organization's culture. Collaboration is not an inherent part of government's culture, and trust between vendors and customers, program and IT, control agencies and service delivery departments is just as elusive. That we could consider a model (agile) that's completely reliant on these

behaviors is a step forward, but does not guarantee any kind of success, and comes with its own giant pile of risks.

The real risk of failure is the risk that we fail to realize this opportunity to change how we do things and to make progress toward a culture of communication, collaboration and trust. We need to define projects in smaller ways that will help us deliver functionality more quickly and then build on that functionality while building confidence in our ability to collaborate effectively. Agile presents this opportunity by default, but the concept is by no means confined to agile. If we fail at this, we have failed everyone — ourselves and all the people of California — not just children.

Thinking it all the way through and addressing the culture issues will help us realize agile success. ●

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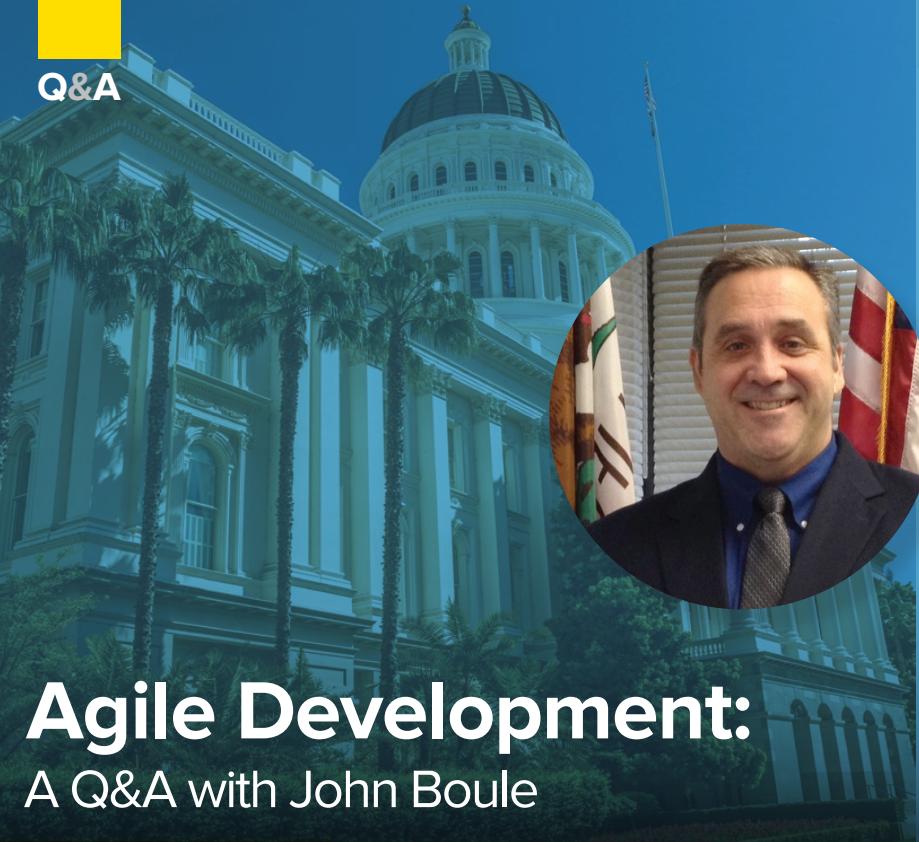
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# Agile Development: A Q&A with John Boule

By Brooke Edwards Staggs

When the National Association of State Chief Information Officers surveyed leaders on their top 10 priorities for 2016, many familiar topics reappeared, like security and cloud services. One new priority also made the cut: agile development.

California has long used the traditional “waterfall” method for IT projects: a project is completed in sequences before teams can move on to the next phase. But that has left California with a legacy of projects that have busted their budgets and taken years to complete, with technology and needs changing before anyone can use the end product.

In this new agile approach, projects are completed in smaller “sprints.” Teams are regularly turning out usable products, so those early iterations can be continually assessed and adjusted as needed. Endorsers of the approach promise projects that are completed much more rapidly, at a lower cost and with a final product that’s actually viable.

California is now in the procurement phase of its first effort to use the agile method with the Department of Social Services’ new child welfare system. *TechWire* spoke with John Boule, director of the Office of Systems Integration, about that high-profile project and his larger vision for how agile might help transform the way California does business.

**Q: Can you give us your take on how agile development is different from the traditional model that's been used?**

On mega, multi-hundred-million-dollar systems, we go through a process that looks at technology and business process and packages it into a large procurement that can take multiple years to get to contract. We then work with the vendor to get into design, development, testing and build. So by the time an end user sees the new functionality or system, it's based on a technology that is at least 5 years old. It led us to say, “We need to do this business differently. Is there a way skilled vendors can compete to deliver a func-

tionality and have the state take responsibility to integrate it?” That led us to do a pivot and to look at agile procurement, as well as development, to implement systems and technology with the end user’s needs in mind. How is that end user going to touch, feel and perform their job? The agile process allows for two-week sprints to get prototype software back into the hands of a user group so we can ask, “Is this what you meant? Is this how it’s going to work? Is this what you were saying when you talked about that requirement or how you wanted to do it?” Agile provides for multiple feedback loops to get a product now. The scope of that product, at least initially, is very narrow so

that we can get that in place and we can make adjustments as we go forward, all with the eye of what the end user needs.

**Q: How does this new model work with the traditional funding and procurement methods? Has it been a challenge to align those two?**

The way we've aligned those two is to make sure that everybody within the state is aligned to do something different. Our statewide procurement division at the California Department of Technology has been a partner in this pivot, as have our federal partners. We are also working with the Department of General Services to narrow down the scope of each procurement so that we're able to apply agile development methodology.

**Q: Why do you think this has become such a key focus for the public sector?**

There are a couple of environmental factors. As we know, technology is changing very quickly. Every single day there are new advancements, and we need to get modern technology into the hands of our end users more quickly. When we look specifically at child welfare, it is a system that was implemented in the mid-'90s, probably based on earlier technology. It's been a good, solid system, but it hasn't provided new functionality.

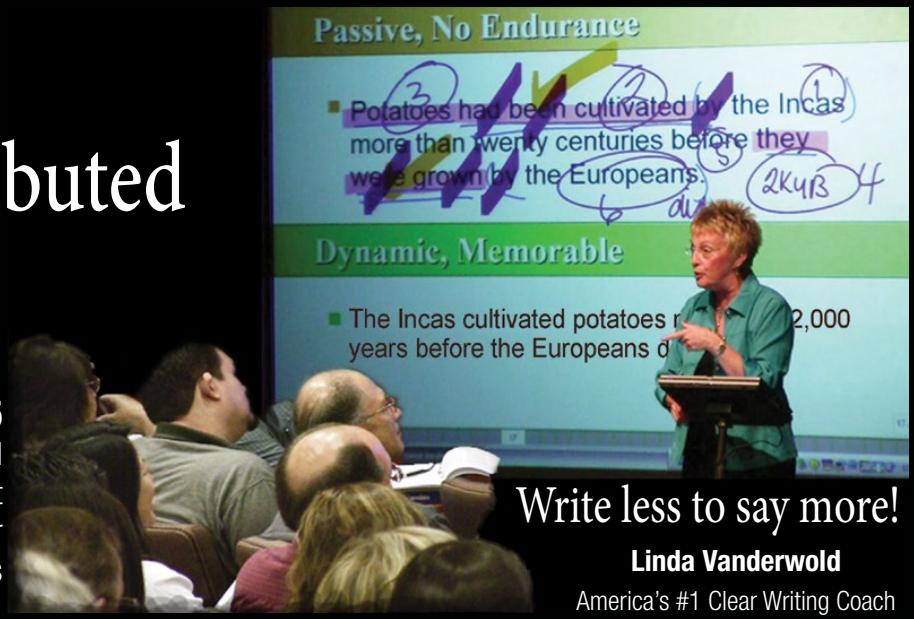
The world has changed significantly since this system was put in place. Mobile technology, the Internet has come into play. With agile procurement, we don't have to wait five years to get functionality into the hands of our users, and we can make sure the system stays relevant. When you look at the child welfare system, it supports some of the most vulnerable children in California. We need to make sure our child welfare professionals have the modern tools they need to do a very difficult job.

**Q: Are there certain types of projects that lend themselves better to this approach, or is this something you see happening statewide?**

Our focus is to use the child welfare system as a demonstration project — to see how to use this agile procurement and modular procurement to fulfill the

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need of a large business transformation project. We're going to learn a lot as we go through this, and then we can look at applicability for other areas.

**Q: Were there particular things about the child welfare project that made it a good candidate for this pilot?**

The federal Administration on Children, Youth and Families definitely wants to see child welfare automation done differently. They've worked with the federal entity 18F, which is a consulting group within the General Services Administration that has made some of these pivots to agile development in the federal space. They are going to be working and partnering with us on child welfare. Our federal partners said to California, "Hey, we would like you guys to be leaders in this, and we know that the federal government has done this and we want to bring our resources to bear on this." So it is a support model within the state for this demonstration project, as well as with our federal partners.

**Q: Code for America is supporting this project. How much do you think groups like it might play a role in these types of projects going forward?**

We spent quite a bit of time on this particular project, almost two years, really identifying the overall objective and the vision of this solution delivery. It was because of that work that allowed us to say, "Great. Our objective does not change. Our vision does not change." It's simply the way of delivering and meeting the objective or having the ability to leverage more of an innovative approach. In addition, strong federal support made this a very strong candidate for a demonstration project.

**Q: Are there any aspects of implementation where you've already started to see agile development make a difference?**

We're definitely still in the procurement phase. The first timeline we scheduled was the Dec. 21 release of our first two modules — one for intakes and one for an API module. We met that time frame,

and we are now coming up on deadlines for vendors to submit their intent to bid. Our vendor forums were very well attended, and people are very interested. But we want to see how many people are really going to attempt a bid. We're moving toward a May contract award. When we look at procurements, that's a very rapid procurement cycle.

I think one key difference is that people know that there will probably be some mistakes coming; there will be a bumpy road. It's a key premise of agile that you're going in and you have a limited scope and you're going deep through the process. And as you find issues, it allows you to iterate, to make improvements and to do adjustments very quickly so that you apply lessons learned and you get better over time.

**Q: Does it take some of the pressure off because agile is pitched as being able to make corrections, as opposed to, "We work on something for years and then we have this one project that better deliver in that moment?"**

I think there is a lot of pressure. This is new. There are knowledge gaps that we have to fill, and we will have requests for offers that are out on the street for agile development coaches, designers, research and design support. Our staff is excited about it, and they feel very empowered. They want to do these things, but it's new. They're learning. So by no means do I think the pressure is off. There's accountability, there's excitement, and we know that we need to step up to our role to work with multiple vendors to bring this system to fruition.

**Q: What is the bigger picture of what this move to agile means for the vendors who work with the state?**

We expect our vendors to be agile-proficient and provide a user-centric design that looks at the end users. For our vendors who have always done business with the state, they have to look at this as a substantially different model. We're also asking vendors who haven't done business with the state to take a second look at us. Maybe this is an environ-

ment that they're well suited for now. So hopefully there will be a broader vendor community looking at these RFPs, especially with them being smaller modules. We think the risk profiles of those modules are something that will attract multiple vendors and bring an environment of competition as we go forward.

**Q: Have you started to see that type of reaction so far in the meetings and things that you've had on this topic?**

Absolutely. I've been involved in vendor forums across my career and I've never seen as many people show up to one as we had for the new child welfare system. We had over 100 people in the room, over 100 on the phone and over 200 participants on a WebEx call. That tells me that the vendors who have done business with the state for a long time are very interested in seeing what we want to achieve so they can be agile themselves. And I think we've also drummed up the interest of some people who have never done business with the state before.

**Q: Through those forums or interactions, whether it's with vendors or staff, are there any common questions, misperceptions or concerns about this transformation?**

Anytime an entity tries something new, there are the more cautious comments to balance the excitement. We're getting feedback from various perspectives, and we see those as very constructive and healthy. We welcome them. Historically, sometimes it's been very requirements-focused. We want to make sure we meet requirements, but also that technology meets the needs of those end users who work to protect very vulnerable kids.

We're going to make mistakes, and we're going to go forward and make adjustments. We're establishing an environment to do that. So when you have an environment that acknowledges that there's going to be bumps in the road and that we're going to make adjustments, it also leads to innovation and creativity to meet your goals and objectives. ●



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*Bill Haight has served Salt Lake City as the CIO and director of Information Management Services, participating first-hand in the evolution of IT over the past 35 years. Elizabeth Raley serves as director of Professional Services at CivicActions and is a practicing ScrumMaster with a deep knowledge of agile and its benefits to agencies.*

# How Do You Save Government IT?

There's awareness that change is needed, and the solutions are becoming apparent.

By Bill Haight and Elizabeth Raley

A majority of IT projects undertaken by government fail to deliver satisfactory results, cost more than anticipated or take longer to implement than planned. How often do we, as project managers and government employees, hear things like this: "It's software development; it'll take as long as it takes." "I know it's what I told you to build, but it's not what I need." "Tell me again why it's going to cost an additional \$50,000."

Faced with tighter budgets, increasing expectations and closer public scrutiny, government IT organizations are under extreme pressure to deliver technology solutions that meet the needs of their users quickly and at low cost. Where the traditional project management approach has failed, agencies need to find alternatives to address these heightened expectations. Agile development has sparked the interest of public-sector change-makers as a way to save government IT from the debacle of skyrocketing costs and redundant systems.

Agile is an entirely new way of approaching project delivery, especially for public agencies. Many of the concepts employed in agile are not particularly new. They have been used in software development under names like prototyping, extreme programming or rapid application development. Frameworks like Scrum bring a structured methodology to these same concepts. It's about breaking up large, complex projects into easily digested pieces and routinely getting feedback to make sure what is being delivered is in line with what's needed.

These methods represent a huge cultural shift for agencies, which have been slow to adopt agile practices main-



ly due to a lack of understanding about how it works, how to get started or how agile actually benefits government. In response to the need for an agile community in the government space, Agile Government Leadership (AGL) was created to provide resources, training, conversation and help for those looking to implement agile into government.

AGL's working group includes employees from federal, state, county and city government — all with similar experiences of discovering agile as the solution to specific issues within their agencies. They found that each successful agile project carries the next one forward with increased momentum, while agile processes are often adopted by other teams and organizations that observe the successes and want to try it too.

Agile is, certainly, a new way of working for government. It's also essential to meeting the demands of the modern digital age where traditional development systems are no longer adequate. The mammoth failures of government IT in instances like HealthCare.gov and California's Case Management System have not been without lessons learned.

Federal efforts such as the TechFAR Handbook, U.S. Digital Services Playbook and the Agile BPA have helped agencies start charting a new course. Not only is there an awareness of the need for change in government IT, the solutions are also becoming apparent. Agencies are beginning to adopt agile — not just talk about it — as a proven way to make their projects more efficient, effective and successful. ●



California's new innovation lab and technology engagement office will bring open source development to the forefront.

By Matt Williams

## A New Source for Change

The state of California has joined the growing ranks of governments that have started a dedicated office for driving technological innovation.

The California Department of Technology (CDT) in February announced that its new Office of Digital Innovation and Technology Engagement will focus on developing cost-effective, open source solutions for the state. The new office, which will be managed by State Geographic Information Officer Scott Gregory and his team, will develop a testing environ-

ment called the California Innovation Lab within the state's private cloud.

CDT said the office was created to lead a culture of innovation that will improve government and citizen engagement in California, and to drive the department forward as a thought leader and technology innovator in state government.

"This mode of communication — between government and the citizen — strengthens and bolsters our democracy," said Chris Cruz, chief deputy director of operations for the CDT. "This project will create an important link between what we promise and what we

deliver as a trusted government partner to effectuate civic engagement."

The first major initiative of the new office will be the innovation lab, which CDT said will be a "tech habitat" for California government organizations to build, test and deploy open source technologies within the state's data center. The department said the lab will be the impetus for a radical shift in how the state develops potential technology offerings and enables transparency.

"Delivering the promise of a new conversation between government and citizenry is the impetus of this project," Cruz said. "Through it, we provide transparent access to taxpayer-derived data and content, the potential for more cost-effective and efficient technology solutions while engendering a climate of civic innovation that will increase governmental and citizen engagement in the safety and security of CalCloud."

An application that helps citizens and government to understand the quantity of sustainable products that departments purchase will be the first application managed and developed within the innovation lab's open source environment. The application, written in the Ruby on Rails Web application framework, was developed during a sustainability code-a-thon hosted last year by the California Department of General Services.

The Office of Digital Innovation and Technology Engagement will leverage the state's current investments in data and information, CDT said, and will be tasked with creating new and innovative approaches to information sharing that will enable data-driven decision-making. The open source technologies developed within the office will focus on agile, efficient and cost-effective offerings.

In tandem with the new office and innovation lab, CDT said it will develop policies and usage standards around the use of open source technology within the state's open source cloud environment. The policies and standards will leverage industry best practices and lessons learned from the open source community. ●



## Sacramento Moves Forward with \$1.5M Body-Worn Camera Pilot Program

The Sacramento City Council approved a \$600,000 grant in October from the U.S. Department of Justice that will go toward developing, implementing and evaluating a body-worn camera program over the next two years. Total cost of the program will be about \$1.5 million, the Sacramento Police Department said, with the rest coming from matching funds. The grant will help fund two new IT support specialists who will manage the body-worn camera technology and inventory, and it is expected \$370,000 will be spent for equipment and nearly an additional \$700,000 for data storage. The police department estimated it would need to spend an additional \$419,000 annually to maintain data storage for on-body cameras after the two-year trial ends in 2017. The department was in the process of testing five different body-worn cameras that were on the market with a small number of K9, bike officers and other specialty units.

## Fixes Sought for California Medicaid Management Information System

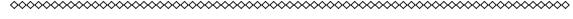
TechWire reported on Oct. 19 that the Department of Health Care Services (DHCS) and system integrator Xerox State Healthcare are discussing how they will move forward on replacement of California's Medicaid case management system. DHCS sent a letter to Xerox dated Sept. 22 notifying the company it missed a Sept. 21 deadline for delivering Release

2.0 of CA-MMIS. In the letter, DHCS said there is risk of further project delays and that fixes to source code, architectural design and other elements are needed. On Oct. 13 Xerox announced publicly that it's unlikely to finish its Health Enterprise platform in California. The company said it's in discussions with the state. The system replacement project is budgeted at \$458 million, according to the Department of Technology.



## Department of State Hospitals CIO Heading to Private Sector

Department of State Hospitals (DSH) Deputy Director and CIO Jamie Mangrum has accepted a job with SAS Institute. He started his new role on Nov. 16. Mangrum has been chief information officer and deputy director for the California Department of State Hospitals since 2011. Mangrum also is credited with building what's now considered one of the largest project management offices in state government. DSH was created by Gov. Jerry Brown's 2012-13 budget, which eliminated the Department of Mental Health by transferring its various functions to other departments. DSH manages the California state hospital system, which provides mental health services to patients admitted into DSH facilities. The department oversees five state hospitals and three psychiatric programs located in state prisons.



## California Plans to Re-Bid Smog Check Inspection Data System

The California Bureau of Automotive Repair plans to move the system that processes smog check inspection data into the state data center and release a new maintenance and operation bid opportunity for it in 2017. The California Vehicle Inspection System (Cal-VIS) is currently maintained and operated by a contractor at a third-party data center. State officials want to move the system into California's Tier III data center at the Office of Technology Services in part to comply with the Department of Technology's IT policy and reduce the risk of exposure. The current vendor, which has maintained Cal-VIS since 2005, also owns the system's code and hardware. Cal-VIS contains 33 million smog check test records and other data; nearly 50,000 tests records are input per day, according to the state. The Cal-VIS project re-bid currently is budgeted at \$4.4 million.

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## State Library Names New CIO

David Wanjiru started Nov. 2 as CIO of the California State Library, where he will manage the Information Technology Bureau. The California State Library is the central reference and research library for state government and the Legislature, provides research to policymakers and the executive branch, and preserves California's historical items. Wanjiru has worked for the past 25 years in various IT positions for the state, most recently as the infrastructure services manager for the California Highway Patrol. He also held positions at the departments of Water Resources and Transportation, California Energy Commission, and taught at the University of Phoenix.

## California Opens New Online Procurement System

Vendors, bidders and suppliers that do business with the state can now register online with the launch of Cal eProcure, California's new online marketplace for businesses wishing to sell goods and services to the state. The new website, launched Dec. 9, is "designed to improve the experience of businesses selling products and services to the state of California" and replaces the previous system known as BidSync. More features will be added, including the ability for state departments to post bids and solicitations. A subsidiary program of FI\$CAL, Cal eProcure is the product of a partnership between the Department of Finance, the State Controller's Office, the State Treasurer's Office and the Department of General Services.

## Green Government Code-a-Thon Awards \$25K to Teams

A contest to see who could come up with the best apps, visualizations and other tools to help improve government sustainability practices was held in October at the first-ever state code-a-thon in West Sacramento, offering a total of \$25,000 in prize money to four winners. The objective of the California Green Gov Challenge was to find innovative ways to reduce waste in resources and increase sustainable practices. Out of 14 finalists, first prize and \$10,000 went to Team Insight for its project Green Buyer. Second place and \$7,500 was awarded to Nudge SMS for an app that alerts, or "nudges," users with important information. Judges evaluated the projects on the effective use of data sets from the state's GreenGov open data portal and other public sources; innovation and creativity; user-friendliness, usability and interface; and the feasibility of the project's implementation.



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## Does California Need a 'Digital Nudge'?

California State Senate President Pro Tem Kevin de Leon invited Professor Shlomo Benartzi of UCLA to speak to Senate staff in October about "digital nudging," a relatively new field of science that combines both behavioral analysis and new and developing technologies to help people make better decisions. As the co-chair of the Behavioral Decision-Making Group at UCLA's Anderson School of Management, Benartzi studies the ways that people act differently online and through their devices. De Leon said it also might be applied to change how people vote, how often homeowners water their lawns during a drought or help constituents voice their opinions on a variety of issues. The senator said he was pleased to say that he thinks California is "uniquely positioned to develop a Digital Nudge Initiative for other states to follow."

## Treasurer's Office Launches Debt Data Site; IT Director Looks Ahead to Future Efforts

The State Treasurer's Office announced a new open data website that dives deep on the \$1.5 trillion in debt issued by state and local government during the past three decades. DebtWatch presents data that was previously only available in a spreadsheet kept by the California Debt and Investment Advisory Commission. According to the Treasurer's Office, the information from 1984 to the present includes 2.8 million fields of data and 52,000 records.

DebtWatch, at [debtwatch.treasurer.ca.gov](http://debtwatch.treasurer.ca.gov), is similar to websites such as [publicpay.ca.gov](http://publicpay.ca.gov) that State Treasurer John Chiang launched when he was state controller. Treasurer's Office IT Director Jan Ross plans to implement a similar type of open data program and digital initiative for the state treasury. The project took about six months, Ross said, after the contract was signed in late April. DebtWatch is purposely designed to be accessible to non-techies.

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## New Project Management Initiatives Should Help Vendors, California CIO Says

State CIO Carlos Ramos on Dec. 1 discussed a series of initiatives underway that are designed to improve project management, reduce project risk and help vendors work effectively with their state partners. Ramos said the procurement analysis stage of the state's revamped project approval process was due to be released in early January 2016. He urged vendors to look out for the state's new process that will publish conceptually approved projects quarterly. The new California Project Management Office (CA-PMO) will offer professional project management expertise to agencies and departments that need it. The project management framework is scheduled to be released in May. The CA-PMO also will be developing a practitioner database and training curriculum for project management, Ramos said. Additionally the state has created a Project Management Advisory Council composed of representatives from the Office of Systems Integration, the Franchise Tax Board and other agencies that have track records of successfully managing projects.

## State Treasurer Seeks Alternative Procurement Models in 2016

State officials took to the stage to discuss technology initiatives and what they see coming in 2016 at the *TechWire State of Technology Industry Forum* Dec. 1. The panel highlighted what each represented agency would focus their technological efforts on in the coming year. Jan Ross, CIO of the State Treasurer's Office, said her agency would be looking toward alternative procurement models in 2016. She said the agency would continue its push to open state financial data and provide more self-service tools. The Department of Justice will also be continuing its open data efforts, according to CIO Adrian Farley. He said the department is focused on publishing "vast amounts of data" through its online portal to help improve public policy and safety. At the Department of Technology, Chief Deputy of Operations Chris Cruz said advancing CalCloud would remain a priority. He said the department would also continue its partnerships with the civic hacking community to further state technology objectives.

## Governor Appoints Caltrans Chief Information Officer

Gov. Jerry Brown on Dec. 4 appointed state IT manager George Akiyama, 50, as chief information officer at the California Department of Transportation. Akiyama previously served as IT manager at CalPERS since 2012 and in the same position for the Franchise Tax Board starting in 2011. He also served as deputy director and CIO for the Financial Information System for California from 2009 to 2011, and as IT manager at the Franchise Tax Board from 2001 to 2009. Akiyama is replacing Gigi Smith, who retired in January 2015, and Sumi Smith, who served as acting CIO after Gigi Smith's departure. Akiyama will earn \$125,004 annually.



## Newsom's Gun Control Measure Would Create Database of Ammunition Sales

A proposed gun control ballot measure backed by Lt. Gov. Gavin Newsom would require California to create a new database to track ammunition sales. The Safety for All Act of 2016 would amend state penal code to require vendors who sell or transfer ammunition to submit a form to the California Department of Justice (DOJ) detailing the sale date, the salesperson who processed the transaction, and the purchaser's full name, driver's license or ID number, address and birth date. The information would remain confidential and could only be used by the department for law enforcement purposes, according to the ballot language. The California DOJ already operates a registry for firearms sales. No other state requires background checks for ammunition purchases, according to the *San Jose Mercury News*.

## State Launches Pilot to Rate IT Vendor Performance

The California Department of Technology provided more details in early December about a pilot to rate IT vendors to increase performance and accountability in state technology projects. The new pilot will start in 2016 with some specified new procurements. The Contractor Performance Evaluation Scorecard will measure five key performance indicators, included in language of RFPs and signed contracts. Overall ratings will look at scope, schedule, quality and timeliness. Ratings, performed quarterly throughout the year, will be made public and stay on the books for 36 months. California has been working on developing a rating system for more than a year and a half, though state officials noted that the rating system is a proposal at this point and could change based on the pilot and additional feedback from the vendor community.

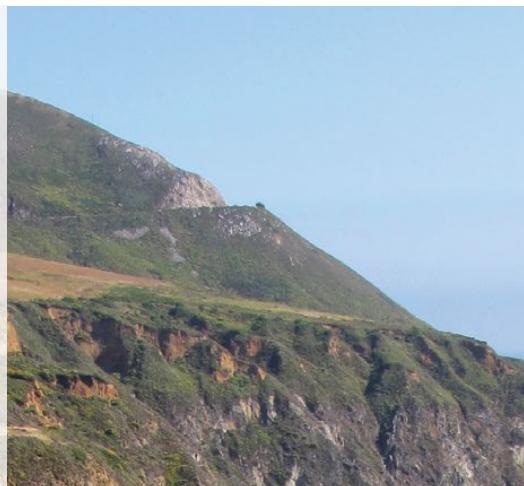


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**\$2.8 billion  
in estimated  
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increases**

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**160+**  
**projects**

where CGI has partnered with the State to improve IT and business processes



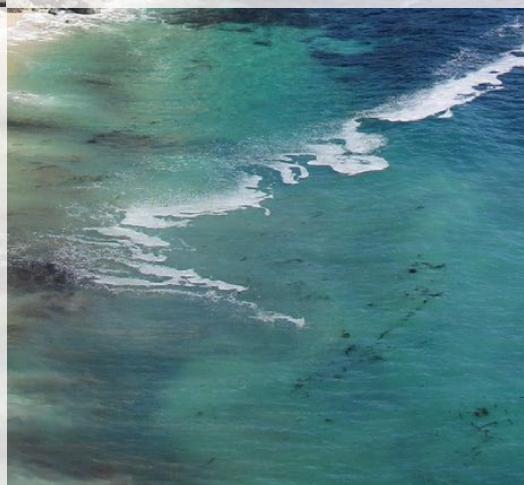
**\$11 billion+**  
**of public  
assistance  
benefits  
reconciled**

annually by the EBT Statewide Automated Reconciliation System



**\$200 million in  
annual federal  
penalties  
eliminated**

for the Department of Child Support Services



**9.5+/10.0  
average  
client  
satisfaction  
scores**

for CGI's work with the State of California

## Vendors Weigh in on Performance Evaluation Scorecard

Representatives from dozens of IT companies asked pointed questions about details surrounding the Contractor Performance Evaluation Scorecard during a forum at the Department of General Services in early December. Some revelations included the information that full implementation likely will occur no sooner than 2017; state CIO Carlos Ramos said he expects an evaluation of the pilot to take six to 12 months. State officials and an industry task force are still discussing particulars, such as the grading system. Some asked the state to consider a mutual score or the state to outright rate itself and post it publicly. Ramos said the state does assess its own performance, but those ratings typically are kept internal, while legislative and audit oversight remain public. The state wants “flexibility” to use ratings in future procurement evaluation. The Department of Technology has made the presentation materials available to the vendor community.



## Governor's Budget Plan Would Fund Security Audits, Project Oversight

California Gov. Jerry Brown's proposed budget for 2016-17 seeks to bolster IT security and the success of state IT projects, two areas where the state has come under scrutiny in recent years. Brown's budget sets aside \$1.6 million and 11 staff positions to form a permanent IT security auditing unit within the Department of Technology to review all departments for compliance. He also proposed a \$1.7 million increase for 12 staff positions “to provide project oversight and procurement support to departments to improve the quality, value and likelihood that IT projects undertaken by the state will be successful.” In total, Brown's budget would allocate \$364.4 million to the Department of Technology, a \$10 million decrease from the 2015-16 enacted budget.

## California Wants Up to 6 Vendors for Cloud Assessment Services

The California Department of Technology could establish contracts with as many as six vendors to provide cloud assessment and implementation services. In a Jan. 15 correspondence, the department stated that it would soon release a bid solicitation for Cloud Assessment, Planning and

Implementation Services so that entities could move their systems into the state's private cloud. The assessments will be limited to migrations into the state's infrastructure-as-a-service offering at CalCloud and will focus on the customer's IT portfolio, such as technical infrastructure from systems, applications and functionality to tools and utilities, according to the draft bid. Contracts are expected to last into 2019.



## California Prisons Prepare for New Electronic Health Record System

The California state prison system is slated to come online with electronic medical records this year, with a phased rollout at 34 adult institutions. The \$177 million Electronic Health Record System is intended to support recordkeeping for approximately 125,000 inmates and as many as 3,000 end users. The price tag is about \$5 million more than initially planned to reflect project refinements, according to state records. In 2006, a U.S. District Court put health care at state prisons into a federal receivership. The receiver's 30th “tri-annual” report issued in October concluded that the new system provided by Cerner Corp. will provide “demonstrable and sustained benefits to patient safety, quality and efficiency of care, and staff efficiencies and satisfaction.”

## Department of Consumer Affairs Names CIO

Jason Piccione recently was promoted to the CIO position at the California Department of Consumer Affairs, where he now also serves as deputy director for the department's Office of Information Services. He started his new duties in November 2015. Previously serving as the department's CTO, Piccione has worked for more than 15 years in public service, including in positions at the Bureau for Private Postsecondary Education and the Contractors State License Board, according to the Department of Consumer Affairs. At the department's Office of Information Services, Piccione oversees IT direction and coordinates infrastructure and service delivery across the department.

## Security, Cloud Top State CIO Priorities in 2016

Security, cloud services and systems consolidation took the top three spots in the annual National Association of State Chief Information Officers (NASCIO) survey of state CIOs' key priorities for the coming year. The yearly nationwide survey highlighted some of the larger trends and concerns for technology leaders in the public sector. NASCIO President Darryl Ackley also said he sees state priorities coinciding with the overall changes in the technology market space. With survey results indicating a clear focus on cloud systems and systems consolidation and optimization, Ackley said the shift is a sign the CIO role is maturing. He noted that the role itself will continue to evolve as government needs become more reliant on IT. While the traditional job of the CIO has been more or less tied to keeping the government running on the back end, he said, the role's evolution will continue to demand accurate, timely and concise communication with C-suite executives.



## California Adding Satellite Voice Services to CALNET 3

California intends to procure satellite services from vendors prequalified to provide products and services to state and local government through its multibillion-dollar procurement program known as CALNET 3. In a Jan. 8 invitation to bid, the California Department of Technology said Subcategory 10.1 and Subcategory 10.2 contracts for satellite telecommunications would be similar to and eventually replace the contracts individual state agencies now have. The state currently uses about 500 handheld satellite phones, 26 MSAT G2 locations and approximately 100 BGAN (Broadband Global Area Network) installations, according to the bid invitation. The state is seeking a purchasing vehicle that would offer "a full suite of statewide satellite voice and low-speed data services to Executive Branch Agencies and local government entities." Draft bids are due March 17, 2016, and final bids are due a month later on April 25, although the dates could change. ●



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*Ash Roughani (left) and Joel Riphagen (right) are captains of Code for Sacramento, and both serve as Health Data Ambassadors for the California Health and Human Services Agency.*

# Data Efficiency

California Health Data Project creates a new role in the civic tech community.

By Ash Roughani and Joel Riphagen

When the California Health Care Foundation launched the California Health Data Project last spring, it made a smart decision to create a new role in the civic innovation space. The foundation brought on California Health Data Ambassadors to connect the supply side of the open data equation — in this case the California Health and Human Services Agency's (CHHSA's) open data portal — to the demand side of the equation — or potential users of that portal.

As two of these Health Data Ambassadors, we focus primarily on creating and nourishing feedback loops between the data owners and users, with the goal of making the state's data as useful as possible. One of our primary methods of collecting user feedback is via regularly convening local health data stakeholders to identify needs and opportunities, and distilling those insights into actionable intelligence for the CHHSA open data team. Similar meetings are held by ambassadors in Fresno, Los Angeles, San Jose and San Diego, and they've proven invaluable in setting priorities for improvements to and extensions of the open data portal based on user needs.

In the first phase of this work, user feedback led us to partner with IDMLO-CO to create AsthmaStoryCA.org, which visualizes asthma severity with interactive maps and presents a narrative that tells the story behind the data. Throughout the site's development we used agile methodologies, including working in sprints, delivering prototypes and a working site early in the process, and keeping up a dialog with users. And when, late in the process, a user suggested placing more emphasis on telling a story with the data, we redesigned the site. The result was

a site that pleased the client, provides useful data to multiple types of users and was lauded as a key takeaway from the 2015 Code for America Summit.

As we begin the second phase, we're again leaning heavily on user feedback and focusing on an issue raised by many stakeholders statewide: The social safety net is hard to navigate. That is, information on the human services available to Californians is held by multiple referral services that collect and update data independently and on different schedules, and that aren't interoperable. This results in a landscape of "fragmented and redundant silos" that fails to effectively serve people in need, service providers or decision-makers, said Greg Bloom, founder of Open Referral.

So how might we create a more robust, interoperable human services data ecosystem, using agile methodologies?

We begin with the hypothesis that the cause of pain in this system can be traced to the end-to-end, centralized approach to collect, store and update this information. The irony of the current fragmented referral system is that many of the existing referral services were conceived as ways to centralize previously fragmented data.

But closed systems and centralized structures don't reflect the distributed way human services are delivered to clients. For example, while counties are agents of the state in administering human assistance benefits, most direct services are contracted out to clinics and other community service providers.

The system's distributed nature suggests that no proposed "one-stop shop" would likely gain much traction. Instead, we believe introducing a modular, interoperable, federated system has the highest

probability of success, allowing existing referrers to continue using their current systems for as long as they need to, and requiring them only to make their information available in a common format. This will be the framework on which all of their data can be combined, compared, redistributed and built on, benefiting all users.

Modularity and agility are related concepts. While agility provides guidelines for nimble project development, modularity describes a distributed system design, enabling loosely coupled components that deliver value while minimizing complex dependencies. In fact, distributed systems are inherently modular.

As we explore the possibilities of a federated system of human services data collection and referral, we're using another methodology closely aligned with agile development: discovery-driven planning. Such planning is more flexible than a traditional process that sets out requirements, timelines and well defined project specifications before beginning work, and is well suited to planning for work in a new venture with which there's little experience.

Through this scoping process, we'll be scanning the existing environment, interviewing users, sketching out user journeys, and drafting a high-level system design and implementation plan, all while documenting our assumptions. After the scoping process, we'll have a framework that provides enough information to make an informed decision about whether to proceed to project development and that defines what project success will look like, but is loose enough to let us pivot on the specifics at any point.

The promise of agile development and its related methodologies is project development that's not bound by assumptions early in the planning process that may turn out to be erroneous. This should allow for projects that better meet user needs. But it requires a willingness to cede upfront project control to our future, better-informed selves. Our work is demonstrating, on a small scale at least, that this philosophy can pay dividends. ●

# MEETING OF THE MINDS

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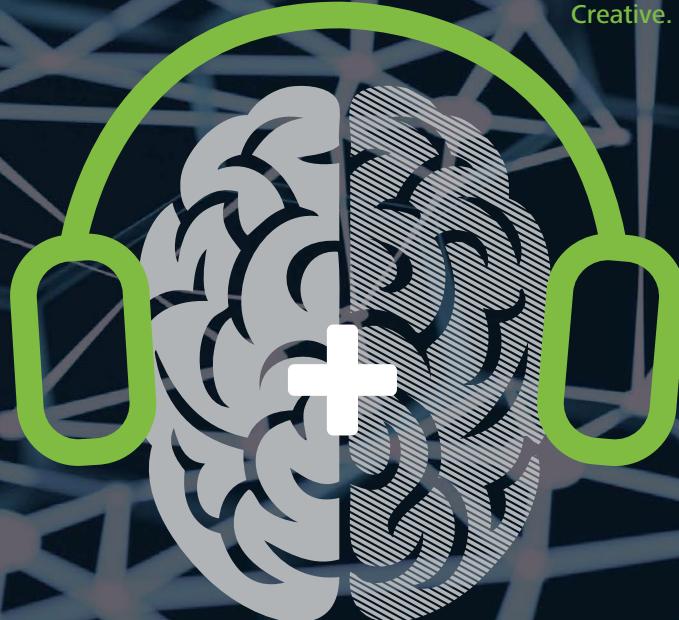
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