



# What It Was, What It Is, What It Will Be:

Notes from the Transformation Journey

EDS Platinum Presentation  
APHSA-ISM 40<sup>th</sup> Annual Conference

# Agenda

- Opening Remarks
  - John Petraborg, EDS Client Industry Executive
- Colorado Benefits Management System (CBMS)
  - Scott McKimmy, EDS Colorado Client Delivery Executive
  - Ron Huston, State of Colorado Enterprise Architect/CIO  
Department of Human Services
- The CalWIN Implementation: Past, Present and Future
  - Steve Middlekauff, EDS CalWIN Client Delivery Executive
  - Hali Reyes, Operations Deputy for the California Welfare Client Data System (WCDS) Consortium
- Closing and Questions
  - John Petraborg

# Why Focus on Implementation?

- Focus tends to be on the “front end” lifecycle phases
- Implementation is critical to perception of success
- There’s a phase missing from most plans – stabilization
- The new system becomes a foundation for future change

**Why? Because this phase can make or break a project and it sets the stage for your next project.**



# Colorado Benefits Management System (CBMS)

Scott McKimmy, EDS

Ron Huston, State of Colorado

# CBMS Transformation Journey – Agenda

## What is CBMS: History and Snapshot

Scott McKimmy <sup>PMP</sup>

- EDS Client Delivery Executive  
State and Local Government

## Transformation Journey

- Implementation: Challenges, Lessons Learned, Impact
- Post Implementation
- The Next Transformation

Ron Huston

- Governor's Office of Information Technology
  - Enterprise Architect
- Department of Human Services
  - Chief Information Officer

# What Is CBMS?

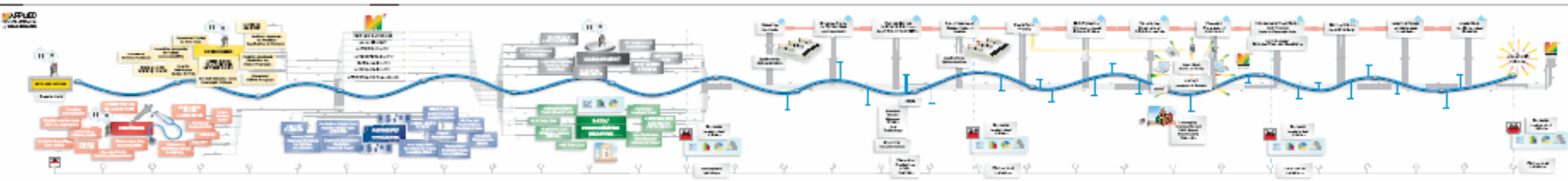
Colorado Benefits Management System (CBMS) is a single integrated system that was designed to replace the functionality of several aging automated systems, to automate client eligibility rules, and to streamline client application, eligibility determination, and benefit calculation.

# CBMS Timeline

The project began over 20 years ago as a vision...

The project work began ten years ago:

- 1997 = Feasibility study conducted
- 1997-1998 = System requirements design
- March 2000 = Contract awarded to EDS
- September 2004 = Implemented State-wide



# CBMS Is...

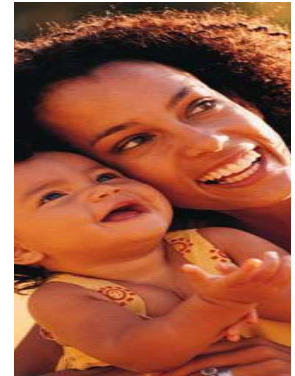
A single integrated system that determines eligibility and calculates benefits for:

- Temporary Assistance Needy Families (TANF)
- Food stamps
- Medicaid
- Adult protective services
- Old age pension
- Aid to the blind
- Aid to the needy disabled
- Children's Health Plan Plus
- Colorado Indigent Care Program

# CBMS Snapshot

A few numbers...

- Number of active cases: 284,768
- Number of active clients: 499,392
- Number of users supported: 3,700+
- Daily transactions: 3.5M to 4.0M
- Annual benefits calculated: \$3.0B



**Using statistics to focus on outcomes; for example, tracking number of programs on average and per client as indicator of client's progress toward self-sufficiency**

# The Transformation Journey

## Implementation – the Challenges

- Change Management
- Resources
  - Financial
  - People
- Communication
- Champion/political support
- Contract requirements
- Product requirements
- Risk Management Plan
- Economic downturn



# The Transformation Journey

## Implementation – Lessons Learned

- Lacked consistent overall understanding of the project goal

*“Improve access to public assistance and medical benefits by providing one-stop shopping for clients, permitting faster eligibility determinations, and allowing for higher accuracy and consistency in eligibility determinations statewide.”*

- Impact assessment
  - Business transformation
    - State operations
    - County operations and delivery
    - Client services access
  - Financial implications



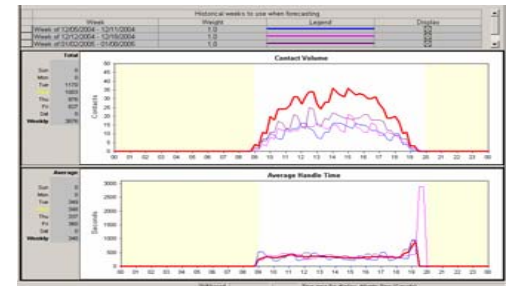
# Post Implementation

Colorado has recently experienced several very challenged projects...

- While other projects failed, CBMS is the only major project implemented
- Concluded that CBMS was successful due to:
  - Dedicated State and EDS team members
  - Solid processes and procedures
- Failed Projects Inspired:
  - The need for new Legislation
  - Establishing new Project Governance Model
  - Improved contract templates
  - Vastly improved Information Technology Governance
  - Much stronger partnership between Departments, Governor's Office and Legislature

# The Next Transformation Event

- Developing an Information Technology Enterprise Management Plan
- Executing assessments of active projects
- Implementing newly established Governance Model for new projects





# The CalWIN Implementation

Steve Middlekauff, EDS

Hali Reyes, WCDS Consortium

# Welfare Client Data System (WCDS)

## CalWIN - EDS Relationship

### A brief history...

- Relationship began in 1982 with 13 Counties... grew to 18 Counties
- WCDS has been enhanced through-out the years to incorporate new functionality along with new programs
- In 1993, in response to Federal requirements began the CalWIN – CalWORKS information Network Project
  - Consistent application of policy
  - Enhanced functionality including case management
  - Online / Real-time interfaces
  - Multi-language capability
  - County flexibility

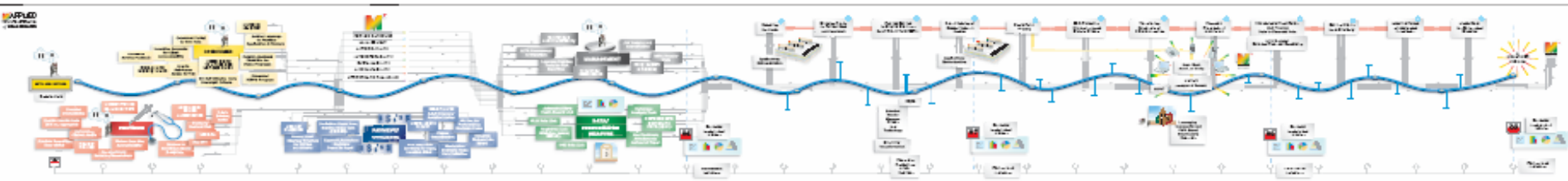
# CalWIN Today

- CalWIN is an integrated eligibility determination, benefit calculation, enrollment and case management system fully operational since January 2005
- Supports the following programs:
  - California Work Opportunity and Responsibility to Kids (CalWORKS)
  - Food stamps
  - Medi-Cal
  - Foster care
  - Adoption assistance
  - County general assistance
  - Child care
  - Cash Assistance Program for Immigrants (CAPI)
- EDS provides software and operations support for all 18 counties

# Past, Present and Future

## Agenda

- CalWIN Overview
- How to Achieve a Successful Implementation
- Finding the New Balance
- The Road Ahead



# Overview

CalWIN is one of the largest welfare computer systems in the country

- Serving 43% of California's welfare population across 18 counties:

Alameda	Sacramento	Santa Barbara	Tulare
Contra Costa	San Diego	Santa Clara	Ventura
Fresno	San Francisco	Santa Cruz	Yolo
Orange	San Luis Obispo	Solano	
Placer	San Mateo	Sonoma	

- Issuing benefits to 2.4 million families
- Supporting a user base of approximately 30,000 in 850 sites
- Processing 11 million transactions daily
- Interfacing to multiple state agencies and with county specific interface capability



# How To Achieve a Successful Implementation

Develop repeatable processes that are adhered to throughout the implementation

- Health check up
- Go-live readiness checklist
- Workaround process
- Trial conversion
- Mock go-live
- Go No-Go
- Apply lessons learned

# How To Achieve a Successful Implementation

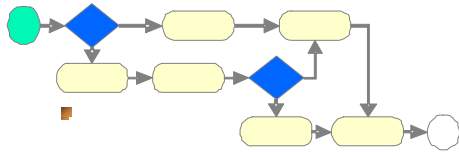
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- Establish relationships with business partners early in the planning
- Keep all stakeholders well informed
- Develop a consistent method of communication with staff and “Use It”
- Acknowledge how difficult change is for everyone
- Provide an adequate level of support



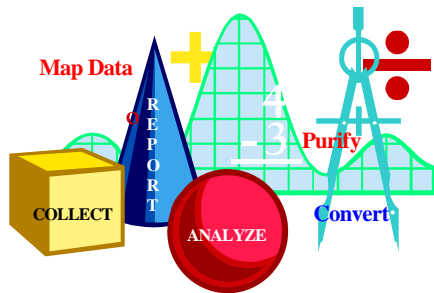
**Implementation is just the beginning  
of a next phase – stabilization.**

# Finding a New Balance



Re-designed Processes

- Re-visit your business process decisions early and often until matured



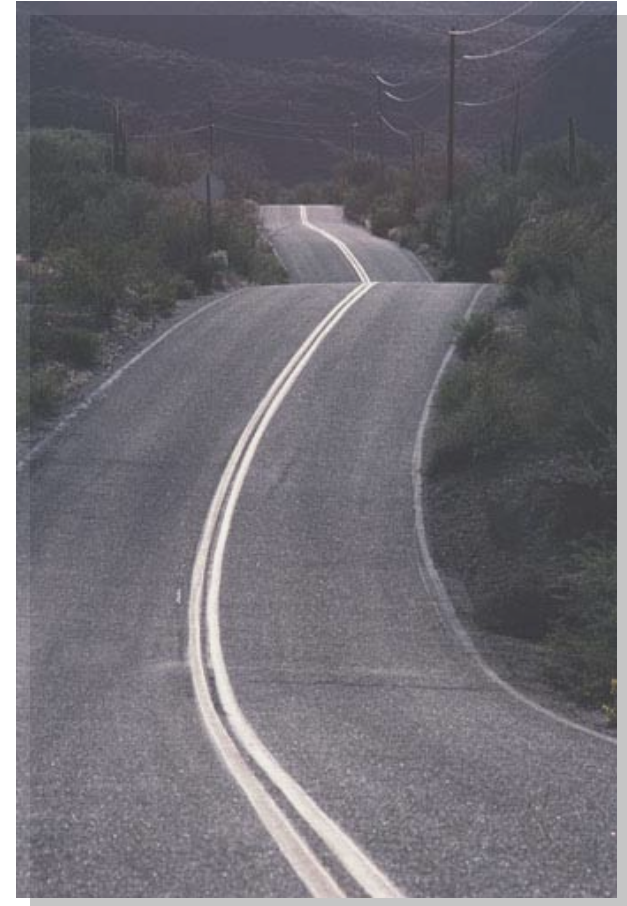
- Take advantage of the opportunity to collect more data and provide better reporting



- Provide refresher training routinely

# The Road Ahead

- Planning
  - Strategic Plans
  - Budget
- “Ease of Use” considerations
  - Management reporting
  - Client correspondence
  - Web-enabling
- Plan for long term viability of the product
- Take advantage of technology
- Balance regulation changes with enhancements
- Market your successes and ideas for the future



# Conclusion

## Improving Implementation Outcomes

- Communication
  - Visible and sustained executive sponsorship
  - Frequent and on-going communication
  - Include all stakeholders
- Governance
  - Ensure there is a common view of the partnership
  - Clearly defined roles and responsibilities
- Project Management
  - Use defined project standards
  - Manage risks early
  - Clear definition of requirements
- Organizational Change Management
  - Dedicated resources
  - Acknowledge the impact and provide support
  - Training



Questions

NOW is where we do business.  
It's when we do business.  
It's how we do business.

ARE YOU READY FOR **NOW**?

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