

Strategic Advisory Services

Last updated: 10-05-23

With a project portfolio of more than \$1 billion and growing, the governor's office and the Legislature expect the WaTech Director and State CIO to take a strong leadership role and engage with agency and project leadership on a consistent basis to improve the outcomes, processes and performance of at-risk enterprise programs and projects that are part of the WaTech oversight services portfolio.

Examples of program and projects that are part of the WaTech CIO Portfolio include the One Washington Program (OneWa Program), the Worker's Compensation System Modernization project (WCSM), the Health & Human Services (HHS) Coalition Integrated Eligibility & Enrollment (IE&E) Program and the Enterprise Electronic Health Record (EHR) Program. These programs and projects are large, complex, and high profile, often spanning multiple agencies, and pose a high risk for not only the lead agency but the enterprise as well.

To better support and increase the successful implementation and completion of these programs and projects, the WaTech Strategic Advisory Services was created to engage programs and projects early and often that are part of the CIO Portfolio, and use its authority to require agencies to receive, evaluate, and take actions on recommendations. The goal of the CIO Portfolio Strategic Advisory Services is to support and guide agencies through successful execution of important programs and projects.

The objective of the CIO Portfolio Strategic Advisory Services is to bring to bear all the available services and resources in a multi-disciplinary approach to improve Washington's program and project oversight model so that agencies, stakeholders, and residents can expect and receive improved services and performance.

The CIO Portfolio Strategic Advisory Services is an important component of oversight and WaTech's commitment to support and lean in to ensure programs and projects are successful.

Given the complexity and level of risk associated with these programs and projects, many will remain in the CIO Portfolio for the lifecycle of the implementation. Other projects may be escalated to the CIO Portfolio Strategic Advisory Services to help agency leadership work through significant challenges to stabilize the project, keep it moving forward in a healthy and successful way and scale down from the high-profile CIO Portfolio.

Intended customers

While the Strategic Advisory Service is available to agencies and organizations, the focus of the service is agencies and customers that are associated with projects and programs in the CIO portfolio of projects. However, the service can assist agencies with investment requests, and provide high-level consultations on specific project issues or questions.

Options available with this service

- This service is part of the WaTech agency decision package consult and scoring team.
- Investment strategy consult for agencies and programs in the CIO Portfolio.
- Steering committee membership and engagement.
- Quality assurance and vendor engagement.

Helpful information

Service category

Professional Services

Service availability

24/7/365

8 a.m. to 5 p.m., Mon-Fri with required availability on a regular basis outside of core hours.

Planned maintenance

Not applicable

Supported Services

- Project Oversight
- Project Management Partners
- Enterprise Architecture
- Governance
- Project Management Office
- Contracts
- Human Resources

How to request service

At risk projects are reviewed with the Strategy and Management Division Oversight Services for escalation to the CIO Portfolio.

Service owner

Amy Pearson

- Develop recommendations and conditions in the form of an advisory memo to projects and programs as required utilizing the project authority of the CIO as described in policy 701.
- Manage the lifecycle of contracts from development of statement of works (SOW) to review and implementation of deliverables.
- Business and technical architecture review and recommendations.
- Technical workshops and whiteboard design sessions.
- Coordinate project and program engagement.

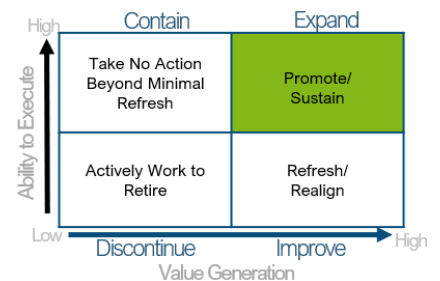
Customer engagement

- Procure expert-level expertise and deploy on behalf of programs and projects in the CIO Portfolio. This could be a project management partner, a technical expert, or an expert level master scheduler, for example.
- Participate as formal members of the program and project executive steering committees, attend technical briefings and workshops and coordinate services across WaTech and expert resources.
- Assist in the preparation and presentations to the Technology Management Council, Business Management Council, Technology Services Board meetings, as well as other stakeholders and authorizing environment briefings.
- Monitor progress, document concerns, and issue recommendations in the form of advisory memos and white papers.
- Conduct extensive deliverable reviews and provide comments and recommendations on key project documents and deliverables.
- Perform strong vendor and contract management including negotiations and contract and SOW reviews.
- Participate in the development of decision packages as well as legislative briefings and meetings with legislators and staff.
- Bring together WaTech resources and services in support of project and program success.

Action plan

Current activity

- Formalize Strategic Advisory Services within WaTech in support of large, complex enterprise programs and projects.
- Execute on our statutory authority to lead the development and execution of an enterprise Electronic Health Record Program and Plan.
- Execute on our responsibility to lead and manage the Integrated Eligibility & Enrollment (IE&E) Program on behalf of the Health & Human Services (HHS) Coalition.



One-to-two-year goals

- Establish and communicate the future vision of the WaTech Strategic Advisory Services Division that has the capacity and ability to take on enterprise project leadership, execution, reporting and engagement.
- Suggest policy changes as needed.
- Transition the IE&E program, resources and budget from DSHS to WaTech.
- Lead the development of the enterprise Electronic Health Record Program and plan.
- Obtain ongoing funding to support the necessary CIO Portfolio Strategic Advisory Services Division.
- Demonstrate the impact of Strategic Advisory Services on the successful completion of project and programs in the CIO Portfolio.

Three-to-five-year goals

- Implement the WaTech Strategic Advisory Services Division.
- Agencies seek advice and guidance from the CIO Portfolio Strategic Advisory Services before the project or program reaches high-risk status.

- Authorizing environment trusts and counts on the services provided by the CIO Portfolio of Strategic Advisory Services to ensure project and program success.

	2023		2024		2025	
	Dec	Jan	Dec	Jan	Dec	Jan
Strategic Advisory Services	One Washington Program Phase 1A					
	One Washington Program Phase 1B					
	Labor & Industries Workers Compensation System Modernization Program					
	Health & Human Services Integrated Eligibility & Enrollment Program					
	Enterprise EHR Program					
	Department of Health Healthcare Enforcement Licensing Management System OLIC Go-Live					
	University of Washington Finance Transformation					
	TBD Project or Program					

Revenue source

- There is not an established budget code for Strategic Advisory Services. It is currently in-kind from staff in all divisions.
- Strategic Advisory Services is currently staffed by the WaTech Director and Chief of Staff with contributions from the Architecture and Innovation Division, Strategy and Management, Security, Contracts, Human Resources, Technology and Operations.
- Strategic Advisory Services are deployed on behalf of an agency and are currently funded by each individual program or project as necessary.
- IE&E Program is funded by DSHS and will provide funding for contractors and FTEs that are transitioning to WaTech. An Interagency Agreement has been established between the HHS Coalition agencies and WaTech that establishes agreements on how WaTech will execute the IE&E program and the required engagement of the HHS Coalition agencies.
- WaTech received \$20M to develop the Enterprise Electronic Health Record Program and Plan.

Decision packages

Currently not applicable.