

Ohio SACWIS Project

Partnership Forum Document

Version 1.5

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Prepared for:



Prepared by:

Dynamics Research Corporation
4010 East 5th Avenue
Columbus, Ohio 43219

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Revision Log

Version	Date	A/D/C (Add, Delete, Change)	Author	Document Section #	Description
1.1	10/14/04	C	D. Wipert, Change Management Lead		Final Version; incorporated State comments
1.2	10/18/04	C	D. Wipert, Change Management Lead		Format Update
1.3	12/1/04	C	N. DeRoberts	2.2, 3.3.3	Updated contact list and incorporated additional State comments.
1.4	8/30/05	C, D	P. Lytle	2.2	Moved contact list to a separate document and inserted a hyperlink to that document.
1.5	9/29/05	C, D	R. Dallamora	Section 3.3	Revised to represent Minutes format being approved and delivered by ODJFS. Removed Appendices.

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Executive Summary

The Partnership Forum is a collaborative assembly of leaders from the State, Counties, and other organizations whose purpose is to support and encourage the implementation of the Ohio Statewide Automated Child Welfare Information System (SACWIS). The Partnership Forum assists in the transition to a statewide system.

Broad based change requires broad based influence, input, and support. Because Forum members have knowledge of the scope of technology implementation issues, they assist in identifying risks and challenges to implementing SACWIS. Their input and feedback supports the State in guiding the project along the narrow path to a rapid implementation. The Partnership Forum is a means to ensure that information about SACWIS reaches all levels of an impacted agency and information from the impacted agency reaches the State.

The SACWIS Partnership Forum Document defines the purpose of the group, the charter of the Forum, details what the Forum plans to accomplish, identifies people who should be involved in the Forum and what role they play to best benefit the implementation of SACWIS.

To best garner support for Ohio SACWIS, the Partnership Forum engages both State and County staff as key stakeholders. The Forum is a means to identify, locate, develop, and encourage potential County and State Change Agents to promote the desired outcomes and benefits of Ohio's SACWIS. The Partnership Forum Document outlines this as well as creates a tool to capture the ongoing activities of the group.

The next step is to convene the Partnership Forum, establish the Partnership Forum Charter, and elect or appoint Forum Officers.

1 Introduction

1.1 Purpose

The SACWIS Partnership Forum Document defines the charter of the Forum, details what the Forum plans to accomplish, identifies people who should be involved in the Forum and what role they should play to best benefit the development and implementation of SACWIS.

1.2 Scope

To best garner support for the Ohio SACWIS, the Partnership Forum engages both State and County staff as key stakeholders and identifies roles to help facilitate changes brought about by the implementation of the new Statewide Automated Child Welfare Information System (SACWIS). Consisting of key stakeholders and supported by the SACWIS Integrated Project Team, the Partnership Forum promotes the desired outcomes and benefits of the SACWIS. The Forum identifies risks and challenges in implementing SACWIS to assist and champion the change process. The Forum also locates, develops and encourages potential champion Change Agents. The Partnership Forum Document captures the ongoing activities of the Forum.

1.3 Definitions, Acronyms, and Abbreviations

An explanation of the following terms, acronyms, and abbreviations assists in reading the Partnership Forum Document. For common vocabulary for this project, please refer to the Ohio SACWIS Glossary document.

The terms *Partnership Forum* and *Forum* are used interchangeably in this document.

Members – People from the State, Counties, DRC, and other organizations who serve on the Forum

Stakeholders – Users of the proposed SACWIS system and all levels of management in a County or Ohio Department of Jobs and Family Services (ODJFS) who manage people using the system

Key Stakeholders – Users of the proposed SACWIS system and levels of management in a County, Agency, or ODJFS who manage large groups of people using the system, e.g., a large metropolitan County or those identified as key influencers in the implementation of SACWIS.

Site – the term site refers to both ODJFS offices and individual Counties

COB – Close of Business

CSB – Children Services Board

DRC – Dynamics Research Corporation

OCF – Office for Children and Families

ODJFS – Ohio Department of Jobs and Family Services

TBD – To Be Determined

SACWIS – Statewide Automated Child Welfare Information System

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1.4 References

Documents applicable to the Partnership Forum include:

“Request for Competitive Sealed Proposals” (RFP), RFP Number 0A03015, dated December 11, 2002, Task 2

Dynamics Research Corporation’s Proposal, Section 5.1.2

2 Resources

The main resources of the Partnership Forum are the people engaged in the Forum. This section defines preliminary roles and tracks the membership by providing contact information for the Partnership Forum.

2.1 Roles and Responsibilities

Roles and responsibilities are discussed in Section 3.2.1, and additional roles are defined by the Partnership Forum during its initial meetings.

Roles and Responsibilities		
Name	Role	Responsibility
	Forum Chair	Responsible for: <ul style="list-style-type: none">• leading meetings, encouraging participation• focusing issues, resolving issues• recognizing accomplishments
	Secretary	Responsible for: <ul style="list-style-type: none">• recording, formatting, storing and distributing meeting minutes• recording, formatting, and storing action items• recording, formatting, and storing issues tracked by site
	Officers TBD	

Figure 1. Roles and Responsibilities

2.2 Partnership Forum Contact Information

A table containing the most current contact information for members of the Partnership Forum is located at <R:\sacwis\Change Management\Deliverables\Partnership Forum\SACWIS Partnership Forum Members.doc>.

3 Partnership Forum Charter

The following pages contain an initial Partnership Forum Charter to help guide the Forum's planning and activities. Once the Partnership Forum is convened, the Forum's Charter will be refined and confirmed, and, if warranted, a revised Charter published. Dynamics Research Corporation (DRC) assists State staff with the establishment and support of the Ohio SACWIS Partnership Forum to garner support for the Ohio SACWIS.

3.1 *Mission*

The purpose of the Partnership Forum is to engage both State and County stakeholders, identify roles in the Change Management process, and identify champion Change Agents. The Forum promotes the desired outcomes and benefits of Ohio's SACWIS. The Forum assists in the identification of risks and challenges of implementing SACWIS. This information helps in forming the Change Management framework.

The Partnership Forum expedites the acceptance of SACWIS and eases its implementation through the following actions. The Partnership Forum:

- Promotes change at the County and State levels
- Assesses risks and recommends mitigation actions
- Helps remove barriers to the success of the project
- Responds to questions that arise
- Defines goals and success factors for the Forum
- Communicates proactively regarding the SACWIS initiative
- Advises/co-convenes Partnership Forum task forces responsible for implementing action items
- Develops and works solutions across County lines and ODJFS
- Models and promotes behavior that supports SACWIS
- Provides an additional mechanism to insure stakeholders are afforded the opportunity to participate and provides input during the change process
- Identifies and cultivates the involvement and buy in of stakeholders and change advocates at the County and State levels

3.2 *Membership*

The Forum contains representatives from some of the following organizations during development and implementation of SACWIS:

- 88 Public Children Service Agencies (PCSA)
- Public Children Services Association of Ohio (PCSAO)
- Office of Management Information Services (MIS), Automated Systems
- Office of Children and Families (OCF)

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- SACWIS Executive Leadership Committee (ELC)
- SACWIS Business Partners Committee (BPC)

3.2.1 Role of a Forum Member

It is intended that the Forum leverage the experiences, expertise, and insight of key individuals from ODJFS, Counties and other organizations. Forum members are not directly responsible for managing formal Change Management activities. The focus of the Forum is to provide support and counsel. Thus, individually, Forum members should:

- Understand the strategic implications and outcomes being pursued through the system's outputs
- Appreciate the significance of the system for some or all major stakeholders and represent their interests
- Take the role of or assist in identifying champion Change Agents
- Utilize political instincts and influence
- Have a broad understanding of the scope of SACWIS issues and the approach being adopted
- In practice, this means Forum members:
 - Be familiar with the status of the project
 - Regularly attend Forum meetings
 - Act as an advocate for change
 - Help balance conflicting priorities and resources
 - Foster productive and positive communication outside of the Forum regarding the project's progress and outcomes
 - Report progress to appropriate audiences

3.3 Group Operating Procedures

The following are proposed guidelines. The Forum in its initial meetings will refine, confirm and publish revised Group Operating Procedures in the Charter.

3.3.1 Meeting Dates and Times

Meeting dates and times are determined by the Partnership Forum at the initiation of the project. A half-day meeting is necessary to initiate the Forum and decide upon Forum logistics. Early in the project, increased contact and collaboration is necessary to scope issues, achieve consensus on courses of action, and build a team spirit. The length and frequency of meetings needs to be determined to accomplish these ends. It is proposed the Partnership Forum convene on a six week schedule. It is proposed the Partnership Forum ceases to exist after Pilot and full implementation of SACWIS in all 88 county agencies.

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3.3.2 Meeting Location(s)

A State facility is available for Forum meetings. Two recommended sites in Columbus are identified below.

255 E. Main Street
3rd Floor
Columbus, OH

Air Center
4200 E. 5th Avenue
Columbus, OH

3.3.3 Meeting Minutes

The Partnership Forum Secretary records meeting minutes and emails them to Forum participants in a timely manner. Forum members respond to the Partnership Forum Secretary with edits to the minutes as promptly as possible. The Partnership Forum minutes are stored separately in accordance with project documentation standards. Finalized minutes will be posted to the SACWIS website located at <http://jfs.ohio.gov/sacwis>.

Decisions will be determined through a formal consensus process. The procedure for consensus will include the following steps

- Agree on objectives for the task/project, expectations, and rules
- Define the problem or decision to be reached by consensus.
- Determine what must be done to reach a solution.
- Brainstorm possible solutions
- Discuss pros and cons of the defined list of ideas/solutions.
- Adjust, compromise, and specify the agreed upon idea/solution so *all* group members are satisfied with the result.
- Make the decision. If consensus is not reached, review and/or repeat steps one through six.

Based upon the outcome of the decision making process, the Forum will make recommendations to ODJFS for follow-up. ODJFS will maintain final authority on implementing the Forum's recommendations.

3.3.4 Meeting Agenda: Sample

At each meeting, the status of relevant items is reported to the Forum by the Chair, using the following agenda outline:

1. Introductory Items such as:
 - a. Introductions
 - b. Review Agenda
 - c. Minutes from last meeting
 - d. Review of actions arising from previous Forum meetings

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2. Review Program Topics
 - a. Overall Status
 - b. New issues arising since the last Committee meeting
 - c. Milestone review
 - d. Accomplishments against last meeting's plans
 - e. Plans for the next reporting period
 - f. Open issues, project conflicts
3. Consideration of SACWIS topics/items
4. Review and summarize new actions from this meeting
5. Plans, date and location for next meeting