



## **Technology That Benefits Our Customers: System Modernization** by Kate Cooper Richardson, Michele Cristello, Craig Burshem, and Margot Bean

*For the past thirty years, systems modernization has been a big line item on our roadmaps and our budgets—but how is it actually serving our core mission of helping families escape poverty? During the 2019 NCSEA Policy Forum, there was a system modernization plenary that was well received and, quite frankly, left folks wanting to know more! It was so good in fact that we thought that a follow-up interview article with the presenters would be a great way to keep the conversation going. Each one came to the panel with a different perspective: two of them were in the process of implementing new systems within their states; one was starting the path of modernization; and the final presenter brought a perspective from both the private and public communities. Please join us in thanking Kate Cooper Richardson, IV-D Director for the State of Oregon; Michele Cristello, IV-D Director for the Commonwealth of Massachusetts; Craig Burshem, IV-D Director for the Commonwealth of Virginia; and Margot Bean, Managing Director for Deloitte Consulting, LLP, for their willingness to continue the discussion.*

### **Questions for Kate and Michele**

#### **Briefly describe your modernization project.**

**Michele:** Massachusetts recently implemented (in January 2018) a new comprehensive statewide system, which replaced our legacy core child support application, contact center technology (we replaced the IVR and introduced Customer Relationship Management), document generation and management, public-facing customer website, and our data warehouse. The project has been ongoing for several years and is currently in the post-implementation phase. In addition to complete system replacement, we restructured our functional organization and our business processes.

**Kate:** Oregon is in the tail end of a phased rollout of a full legacy replacement system, moving off a mainframe COBOL-based system to a server-based system using Java applications primarily. We've updated the base system from California, added in some functionality from Michigan and New Jersey, and "Oregon-ized" it into a hybrid that meets Oregon's unique needs. Like Massachusetts, Oregon is reorganizing its structure and business processes—organizational change has been a significant component of our project and will be into the future as we move from "storming" and "forming" to

“norming.” As we roll out to our final offices and convert the last of our caseload in April, we’re already preparing for the federal certification process ahead.

### **What was the biggest challenge in your system modernization journey?**

**Michele:** A complete system replacement brings many challenges. I would say our biggest challenge has been the huge amount of change our organization has faced over the last year, from both a technical and organizational perspective. New technology and a new way of organizing our workflow has had a significant impact on our staff and our organization. We prepared for many changes, but we found that we needed to prepare staff again and again. And, of course, there were many challenges that arose that we didn’t expect or prepare for and incorporating that into our change management was very challenging. But there were many other big challenges as well!

**Kate:** It didn’t help to have a historic recession provide a major bump in the road while we were doing all the preliminary work to start the project, but that’s in the rearview mirror now. A surprisingly difficult challenge came in the design period. Oregon had undertaken a business process reengineering, but it still was tough to leave behind our “as-is” mind-set to design “to-be” functionality and processes we’d neither seen nor experienced. Even though we *knew* the holes were round, our hands resisted letting go of the square pegs and picking up the round ones right in front of us. We sometimes struggled to get our heads around concepts and then articulate them completely and accurately. That really revealed itself once we were in the user testing phase, and we had some “aha” and forehead-slapping moments—and had to make some changes, too.

### **What are some of the features of your new system that excite you the most?**

**Michele:** The automation of our workflow in areas that were never automated and increased automation in other areas that will allow our staff to be more proactive and get to cases that may have fallen through the cracks before. The availability of more data to help us really understand what is happening with the program and allow us to use that data to determine what’s next, toss around ideas, etc.

**Kate:** Where to begin! The interface will make such a difference for Oregon’s workers—no more green screens! The level of automation and database-matching is mind-boggling, and it will help us not only to get money to families faster, but also to build capacity in our program—such as targeted labor-intensive but effective case management for certain parents or unique populations. Another feature is the data warehouse, something Oregon’s never had. The potential to work smarter, to support policy and business changes with evidence, and to plan strategically opens a whole new aspect to our program. Finally, the enhanced customer portal provides another way to connect with our customers and for them to feel empowered through better and more transparent access to information and documents in their own cases.

### **Did anything surprise you?**

**Michele:** We expected this large system replacement project to be difficult, challenging, and impactful, but it was difficult, challenging, and impactful in ways we didn’t

necessarily expect and at levels we didn't necessarily expect. It affected everything and everyone. Our system integrates many technologies, which resulted in a complex technical environment. The intricacies of the technologies resulted in impacts that both the business and IT teams did not anticipate or fully understand. That's where a lot of our surprises were—how did x get impacted by y?

**Kate:** Lots of surprises, every day—some happy ones, some less so. I'll name one, however, and it isn't even directly related to the system itself. It's the process—the project itself and how it can change and improve a program. The development of project principles, the discipline of project management, and the physical integration of vendor and state project staff into a single project team have upped the game for the Oregon Child Support Program. The technical and project management skills and environment have seeped into the rest of our program, changing our workplace culture and our own staff's expectations of themselves and others. We not only will have an amazing new tool, we have a new view of ourselves and our capabilities. That leads to a better program overall, for our staff, for our families, and for our state. The holistic change both in individuals and collectively has surprised—and thrilled—me as the executive sponsor of this project and the director of this program. It's more than just a system we built.

### ***Question for Craig***

**Describe some of the daily challenges your program faces with a legacy system.**

Let me put into context what we have in Virginia. We started a process to move from COBOL (green screen) to .NET (GUI) about five years ago. They have completed a lot of the screens; however, worklists are not done nor are all the forms.

So, we live in two worlds—every worker has two screens and often must have APECS (green screen) and IAPECS (GUI) open at the same time as they do their work. I know it is frustrating jumping between two systems.

It is difficult to keep new workers as the legacy system provides no true guidance on how the worker is to work their cases. They are often overwhelmed by the worklists.

### ***Questions for Margot***

**What are the different types of modernization available to states?**

States have a wide range of options to modernize their child support system. These include full system replacement, modernizing legacy systems through code refactoring, and modular system enhancement using modern technology. Full system replacement options include a transfer of another states' system, a custom build, commercial off-the-shelf (COTS) platform-based solutions, and enterprise modular approaches. Modular system enhancements include mobile technology, advanced analytics solutions, Robotic Process Automation (“Bots”), and customer portals.

## **What are the advantages of each?**

There are advantages and considerations related to the various approaches. Transferring a full system from another state provides a functionally complete system as a starting point but may require the state to change business processes and technology direction for better adoption of the donor system. A custom build typically results in a system that is very specific to the state's environment and requirements but may be a more expensive option. Leveraging a modern COTS platform, such as Salesforce or SAP, can help states take advantage of out-of-the box functionality and regular product upgrades offered by product vendors to mitigate development and maintenance cost impacts. Transitioning the legacy platform to a more modern technology through code refactoring can provide a very quick path to move off the mainframe, thereby reducing mainframe costs and allowing the state to leverage the new technology for future enhancements. Modular system enhancements allow states with more limited funding to use technology to automate processes, helping to alleviate pain points and achieve quick wins. This can include providing case segmentation through advanced analytics to help caseworkers make informed decisions; driving program improvement by using artificial intelligence that integrates through case management and customer self-service; and digital enablement of the case record and documents, providing a human-centered design approach for caseworkers, citizens, and stakeholders.

## **If you could give advice to states looking to start the systems modernization process, what would it be?**

Choosing a modernization path depends on the state's needs and business objectives. Be purposeful about assessing your current environment and needs and include the system users in the assessment. Consider your application portfolio and the Chief Information Officer's (CIO's) direction toward application modernization, which may include a common platform, interoperability, and the use of shared assets. Review the economic benefits that cloud infrastructure can provide. Because change management and training can be critical success factors for any system modernization project, budget for experts that focus on this work. Finally, consider the total cost of the system over the life of the application by focusing your decisions on the technology and approach that will allow for extending the life of the modern system over the years to come. Examine the use of rules engines, interoperability, open architecture, cloud enablement, and COTS use when it makes sense. Educate yourself on all the various options open to you and seek ways to implement new capabilities early on.

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*Kate Cooper Richardson is the administrator of the Oregon Department of Justice Division of Child Support and the director of the Oregon Child Support Program, Oregon's federal Title IV-D program. Kate joined the Program in 2010, and was appointed by Attorney General Ellen Rosenblum in January 2013 as director. A graduate cum laude of Willamette University School of Law, her 22-year public service career spans work in all three branches of state government, including eight years as Chief of Staff to the Oregon State Treasurer. Kate is an NCSEA board member, serving as co-chair of the Policy & Government Relations Committee, and an active member of NCCSD. She is currently leading her organization through a multi-year \$140 million replacement of Oregon's legacy child support system, rolling out in phases through early 2019.*

*Michele Cristello is currently the IV-D director in MA and has served in that role since 2015. Michele has spent her entire career in the MA CSE program in various capacities for almost 26 years. Prior to becoming IV-D Director, Michele was the Director of Information and Analysis responsible for CSE strategic planning, reporting and analysis and systems. In 2008, Michele led the initiative to develop CSE's vision, goals and objectives for a new, comprehensive child support system and to outline a technology roadmap to achieve that vision. Until 2015, Michele led the project team through multiple phases of the modernization project. As IV-D Director, Michele oversaw the implementation of the new system in early 2018.*

*Craig Burshem is Deputy Commissioner of the Virginia Department of Social Services and Director of the Division of Child Support Enforcement (DCSE). Since becoming Director, Craig has developed DCSE's three pillars—employees, clients, and performance—and has focused on these pillars to implement a long-range change initiative designed to improve functionality and accessibility for staff and customers. This initiative includes modernizing systems, working with state legislators to improve Virginia's child support laws, implementing telecommuting and alternate work schedules to promote life-work balance, reconfiguring and updating office space, and expanding family engagement programs and community partnerships to help parents make consistent payments and improve their relationships with their children. Craig currently serves as president of the National Child Support Enforcement Association and recently concluded his tenure as president of the National Council of Child Support Directors. Craig earned a Bachelor of Science degree in Hospitality Management from Florida International University and his Juris Doctor degree from the University of Richmond School of Law.*

*Margot Bean is a Managing Director in Deloitte Consulting's Public Sector Practice, focusing on helping child support programs improve their performance by providing effective and efficient, data-driven, customer-focused services. She is focused on helping child support programs develop and enhance case management systems that improve business processes, effectively analyze caseloads, and allow case managers to execute case strategies based on case characteristics. Margot's wide variety of government experience before joining Deloitte provides her with deep understanding and insight. That experience includes positions as Commissioner of the federal Office of Child Support Enforcement, IV-D Director of the New York State Child Support program, IV-D Director of the Guam Child Support Program, and child support attorney. A Past President and Honorary Life Member of the National Child Support Enforcement Association (NCSEA), Margot is a member of the Current Board of Directors and co-chairs the Emerging Issues subcommittee. She is a Past President and Honorary Board Member of the Eastern Regional Interstate Child Support Association (ERICSA). Margot also serves as an advisor to the Western Interstate Child Support Enforcement Council (WICSEC).*