Minnesota Department of Human Services

Integrated Service Delivery (ISD) Product Office Charter

21 January 2022

Revision History

The Integrated Service Delivery Product Office Charter, prepared by Gartner, is intended to be maintained and updated throughout the entire life of the ISD Product Office.

Version	Date	Author	Reason for Change
1.0	12/07/2021	Gartner	First draft for stakeholder review
1.1	12/23/2021	Gartner	Document updated with stakeholder feedback
2.0	12/30/2021	Gartner	Finalized with stakeholder feedback
3.0	01/21/2022	Jason Anderson	Document updated for accessibility.

Table of Contents

Introduction

Background

In May 2021, a representative group of stakeholders from MN DHS, MNIT, Counties, and Tribes selected a strategy for modernizing their information and technology systems in support of Minnesota's goals for "integrated service delivery" — to make human services simpler, and to create a better experience for the communities they serve.

To help implement this strategy and realize their vision for system modernization, the collaborative teamed with Gartner to develop the *Go Forward Strategy, Recommendations, and Roadmap*. The *Go Forward Roadmap* consists of nineteen (19) workstreams, grouped by three domains: Foundational, Planning & Solution Acquisition, and Implementation.

At the heart of this roadmap were several recommendations and activities related to creating an "Integrated Service Delivery (ISD) Product Office" with dedicated resources charged with planning, implementing, governing, and managing all business transformation, change, and systems modernization efforts related to integrated service delivery, focused initially on integrated eligibility and enrollment.

The ISD Product Office Charter is a "living" document that should be updated iteratively as updates to the modernization strategy are introduced or changes to the environment occur, as well as to reflect progress made against specific objectives.

ISD Product Office Vision, Goals and Guiding Principles

The ISD Product Office is an organizational unit being established to enable and support a lean / enterprise agile approach to business and IT transformation for the ISD modernization efforts.

ISD implementation and related systems modernization will be achieved through the transformation of business practices and processes and a new approach to development / acquisition of systems and related capabilities needed for integrated service delivery. In-scope DHS services and capabilities will be delivered and deployed as a series of Products that together comprise the ISD Product Line, managed across the entire product lifecycle by the ISD Product Office.

DHS is engaged with MNIT on an effort to introduce product management at an enterprise level, known as P2P. The ISD Product Office will be aligned with P2P and related standards.

ISD Product Office Vision

The ISD Product Office will define the ISD Products and be the authority and owner of the full-life cycle product roadmaps for the Product Line, with success defined by business outcomes measures and targets included in the roadmap(s).

The vision of the ISD Product Office is to "*Achieve the Modernization goals by the acquisition, creation, and modernization of practices, processes, and systems delivered and deployed as a series of Digital Products*[1] *that together comprise the ISD Product Line, managed across the entire product lifecycle by the ISD Product Office."*

[1] A "digital product" is a type of product that provides a set of digital (information & technology) and related capabilities created and used to satisfy customer needs and/or desired business outcomes.

ISD Product Office Goals and Objectives

The primary goal of the ISD Product Office is to incrementally deliver new or enhanced business capabilities, each of which realize and demonstrate increased business value, by providing all Minnesotans with access to a simpler, more accessible, and more equitable health and human services system, including:

- More complete and integrated services:
  - Comprehensive human services that meet individual, family, and cultural needs
  - The power for people to determine their needs, choose services, and set up personal goals
  - Information access controlled by people and those working with them at all points
  - Quality customer service throughout the person's experience
  - Approachable new ways to access human services programs
  - Proactive approaches that support continuous improvement at all levels
  - Statewide initial screening questionnaire focused on helping with unmet needs
- Increased consistency and usability:
  - Efficient data collection processes with intuitive features
  - Uniform data security and privacy standards, and secure data collection and access
  - Services of all types — from in-person to online — delivered in a flexible, comprehensive system that supports individual needs and goals
  - Personalized access for users and community/service partners, including 24/7 online information and ways to take action through an online account

To meet the goal of the ISD Product Office to incrementally deliver new or enhanced business capabilitiesby providing all Minnesotans with access to a simpler, more accessible, and more equitable human services, the business objectives are as follows:

- Ensure the scope of ISD products (and product lines) is coherent, clear, and driven by specific business outcomes.
- Prioritize and govern the identification of business and solution capabilities in alignment and in concert with the broader enterprise governance mechanisms to:
  - Support the ISD Product Office's ability to manage ISD digital products from end-to-end
  - Hold the ISD Product Office accountable for the successful adoption of digital products
  - Manage any vendor-procured resources needed to support ISD digital products
  - Comply with Enterprise Architecture processes and standards to ensure technologies deployed cost-effectively align and interoperate with the collaborative's infrastructure
  - Ensure proper consideration of County and Tribal Nations' service delivery capabilities and maximize the opportunities for systems interoperability, wherever possible
- Measure product success in terms of business outcomes and adoption/use including measurement of:
  - Client experience, understanding, and empowerment in accessing and utilizing ISD-related programs and services

  - Progress in improving health, security, and well-being for individuals, families, communities, programs, and agencies
  - Improvements in access and decreases in equity gaps for those individuals and populations served
  - Improvements in operational efficiencies and user experience for DHS, County, and Tribal Nation human services administrations staff
- Maintain a continuous delivery value proposition through the incremental and iterative development and deployment of ISD products, following a regular (e.g., every 1-2 mo.) schedule, with the incremental introduction of digital product enhancements or fixes based on ISD business objectives.
- Enable the desired level of incremental delivery with resources operating in multi-disciplinary teams. These teams require:
  - Sufficient business and technical skills, capabilities, or solutions required to enable, implement, support, or enhance the ISD products
  - Dedicated team members from various parts of the of enterprise (cross-cutting) committed to designing, developing, implementing, and/or acquiring digital products that support ISD business outcomes

Guiding Principles

The ISD Product Office will strive to follow the principles outlined below for planning and execution decisions:

- **ISD Alignment:** Be demonstrably aligned with, focused on, and measured by the successful implementation of business capabilities that enable integrated service delivery and modernization. Business capabilities cut across organizational silos and hide technical complexity by focusing on what constituencies do, rather than how they do it.
- **Cross-Cutting Inclusion:** Work inclusively across organizational boundaries including DHS, MNIT, Counties, and Tribal Nations.
- **Managed as a Product:** Dedicated product managers assume end-to-end accountability for their product line, and after funding has been allocated to the product line, they assign money to improve product line performance and meet the needs of the product line's stakeholders.
- **Full Life cycle:** Holistically manage ISD products from end-to-end across the entire life cycle, including:
  - Design / development
  - Adoption / optimization
  - Maintenance / utilization
  - Retirement / replacement
- **Continued Investment in Improvements:** Allocate appropriate level of funding and commit the resources necessary to execute and move forward incrementally and deliver value frequently where prioritized improvements in client / staff / community service provider experience are expected, delivered, and clearly demonstrated by every increment, at a steady rate.

ISD Product Office Scope and Activities

This section includes a high-level overview of all the areas of activity that the ISD Product Office will encompass and substantially influence. It is anticipated that, after launch and during the subsequent operation of the ISD Product Office, these may change, and the charter will be amended. The focus is intentionally narrow at the start and will be on building small successes with dedicated agile teams. Over time, the Product Office will encompass the full effort needed to deliver on the anticipated benefits of Integrated Services Business Model (ISBM) and Integrated Service Delivery (ISD).

ISD Product Office Scope

The ISD Product Office will:

- Define incremental delivery of new or enhanced business capabilities and product features, as integrated service delivery products, each of which will realize specific business and client outcomes and demonstrate increased business value.
- Be the authority and owner of the product roadmaps for ISD products and ISD product line(s) with success defined by business and customer outcome measures and targets included in each product roadmap(s).
- Develop organizational change management capabilities to ensure continuous alignment of all stakeholders.
- Oversee the successful execution of MN DHS ISD Go Forward Strategy and Roadmap developed in collaboration with Gartner.
- Secure the appropriate internal (employee transfers, assignments and new staff recruiting) and external (through formal competitive procurements) resources required to deliver the outcomes and benefits from the ISD efforts.

The initial scope of ISD Product Office is integrated eligibility & enrollment for means-tested health care, food assistance, and cash support programs overseen by DHS. It is overseeing both the business transformation and modernization efforts—focusing on the client experience within the eligibility & enrollment process. Attachment A provides a detailed review of the ISD Product Office first year of activities.

Role in Governance and Delivery

Shifting from projects to products disrupts traditional IT governance, including IT decision rights, stakeholder roles, and business owner / sponsor engagement. Workstream F of the *ISD Go Forward Strategy and Roadmap* is intended to develop an action plan to help adjust current IT governance to appropriately structure enterprise-wide decision making for systems modernization with the establishment of the Product Office. MN DHS and MNIT will need to support product centricity by replacing one-size-fits-all governance with adaptive governance that contextualizes decision rights while balancing product needs with enterprise level goals.

With its focus on centralized command and control, traditional, one-size-fits-all IT governance works fine for project-centric enterprises, but lacks the scope, scalability, and agility to meet the distributed decision-making needs of a product-centric digital business at speed. Traditional governance achieves business outcomes by trying to control the unknown through the use and extrapolation of proven practices. By contrast, the product office needs an adaptive IT governance capability that enables enterprise pivots when faced with uncertainty. This is achieved by empowering the right stakeholders, supported by the right governance mechanisms, to make the right decisions at the right time, on a situation-specific basis.

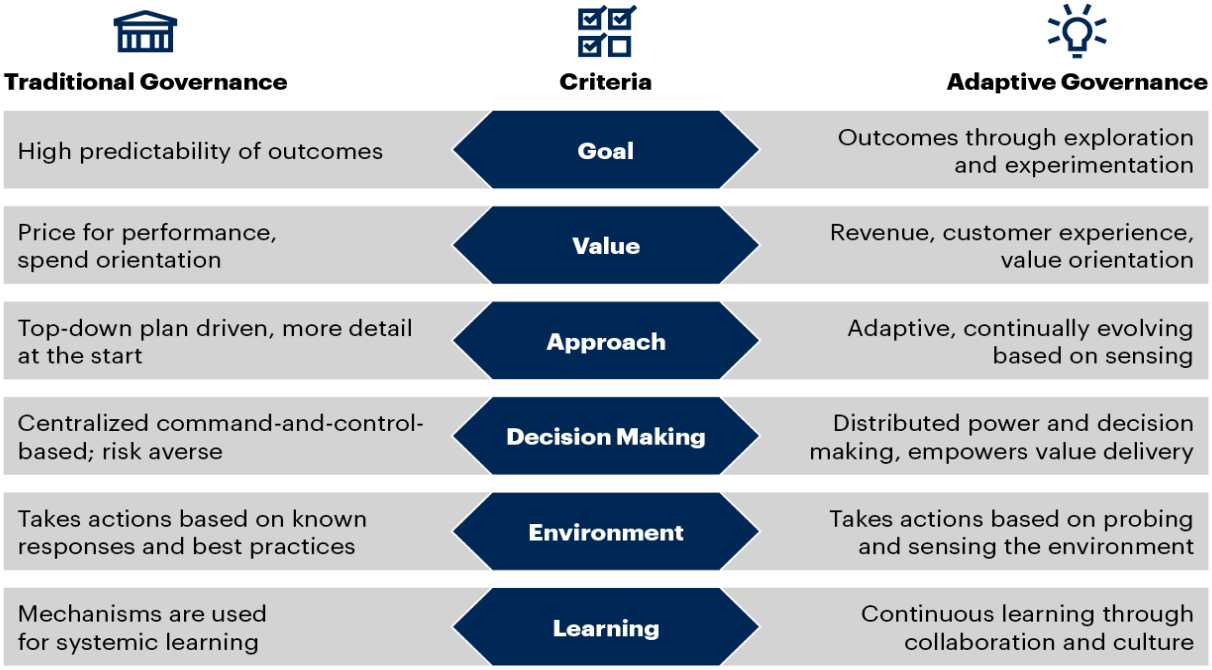
While IT governance has always been a delicate balancing act between control and agility, it is severely limited to drive distributed decision making. Moving from “project” to “product” is a seismic shift for IT governance, as it redistributes, and often obscures, IT decision rights. As MN DHS becomes more product-centric, the IT governance approach must evolve. Adaptive governance extends the enterprise IT governance capability to respond to business demands with speed and agility. It integrates, scales, and contextualizes governance throughout DHS by adapting and distributing IT decision rights according to differentiated outcomes to be achieved on an enterprise and product level.

The ultimate goal of adaptive governance is to enable DHS’s responsiveness and agility, while simultaneously managing risk to provide stability. To achieve that goal, product leadership must collaborate with DHS, MNIT, Counties, and Tribes to create and implement an adaptive IT governance structure that:

- Reflects multiple governance boundaries (i.e., department, enterprise, product)
- Allows multiple governance styles (control, outcomes, agility, autonomy) across the product management capability on a situation-specific basis
- Establishes adaptable roles and influence levels for all affected stakeholders across the enterprise
- Captures data-driven signals and enables leading metrics to inform decision-making
- Adjusts the IT and business owner / sponsor engagement model to reflect new, shared roles and responsibilities

The figure below provides a comparison of traditional vs. adaptive governance style:

Figure 1. Comparing Traditional versus Adaptive Governance



Source: Gartner

Within the ISD Product Office, the Product Owners and Managers will be vested with the authority to define and evolve the backlog of product features and functionality, and to continuously deliver the items that have the highest impact on the desired client and business outcomes. The Product Office leadership will work with the assigned Workstream F team to identify and document the changes needed to the existing governance processes.

Progress and Success Metrics

The Product Office must be focused on delivering on business and customer outcomes and metrics that matter the most. This process will engage stakeholders across MN DHS, MNIT, Counties, and Tribes to work together in building small successes. There are eight best practices that are relevant to business metrics:

1. **Focus on outcomes** — Measure the results delivered, not the steps taken.
2. **Don't use too many measures** — Two or three are preferable to 10 or 12.
3. **Define concrete and visible goals** — Everyone must understand the goals and the results gained.
4. **Establish the initial baseline performance** — Little justification and reward are feasible without knowing where you began.
5. **Link the metrics to strategy**.
6. **Favor predictive measures over historical ones** — Metrics that predict results enable you to act in a timely fashion.
7. **Make the metrics transparent and accessible** — When others can see your metrics, things tend to improve.
8. **Work cross-functionally to assign an owner** — Ownership leads to responsibility and action.

For progress metrics, refer to the Key Performance Indicators (KPI) section of the ISD Product Office Roadmap included in Attachment A of this document.

For business outcomes, by shifting the focus from projects to product lines, DHS might expect to achieve the following:

- Initial funding and resource allocation that are better aligned to DHS's most significant sources of value based on the importance of key business capability, starting with eligibility & enrollment.
- A Product Manager that continuously improves the product offering through a deep understanding of business needs and a close relationship to the product's users.
- Greater flexibility when business needs change. A product-management approach allows DHS to shift funding and resources faster and better frame trade-offs between speed, cost, and adoption.
- Reduced cost for delivering the work in the portfolio. Elevating decisions and activities such as business case creation or the evaluation of scope-change requests can reduce the effort required from IT and business partners, leading to cost savings.
- Support for the foundation for a continuous delivery model. Dedicated, product- based delivery teams can continuously improve information and technology supports for key business capabilities.

In addition to the inherent business outcomes from adopting a full product management mindset, the list below provides a few outcomes by category that will be considered by the ISD Product Office leadership team:

- **Client metrics**

  - Time from application submission until eligibility determination notification
  - Time to complete the renewal process
- **County/Tribal case worker metrics**
  - Number of clients served during measurement period
  - Percentage of time engaging with client
- **Equity metrics**
  - Proportion of benefits received within the ethnic populations vs. overall population distribution with equivalent means

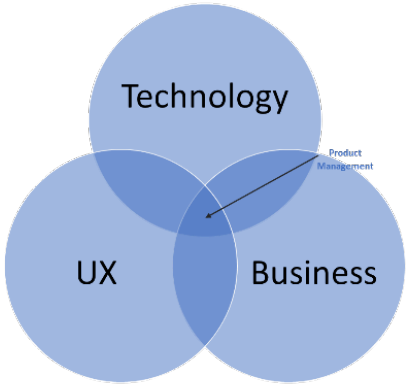
Capabilities and Activities

The ISD Product Office dedicated resources will focus on addressing the capabilities and activities summarized below:

- Define and manage ISD products and product lines
  - Product definition and planning (e.g., product vision, scope, and roadmap)
  - Design and deliver ISD products
  - Track product benefits (metrics)
- Secure product funding and manage budget
  - Identify and secure ISD product funding
  - Manage ISD product budgets
- Guide or manage products, including:
  - Product delivery
  - Business policy
  - Process (re)engineering
  - Request management (County and Tribe requirement development and prioritization)
- Provide communications, training, and reporting for product management and products
- Track product benefits and report to stakeholders
- Manage enterprise architecture (ISD dedicated Enterprise and Solution Architects) including business, information, and technical architecture domains
- Support procurements and management of vendors
- Conduct deliverables reviews and manage and track cross-workstream interdependency
- Implement product delivery methods and provide training support
- Support talent acquisition, development, and orchestration
- Identify and establish service level management
- Identify, manage, and track risks
- Manage solution and team backlog
- Conduct customer experience engineering (research, design, validation)

- Implement organizational change and communications management
- Manage shared services

Figure 2. Product management Venn diagram



Product Office Organization

The ISD Product Office will be placed as an organizational unit within the Business Solutions Office (BSO). Many of the critical business focused resources and activities to support the ISD Product Office are already within the BSO, therefore this is a natural structural placement for the organizational unit. The ISD Product Office will report to the Business Transformation Officer.

Product Office Staffing Model

The staffing model for the ISD Product Office provides estimates of resources for the first year (**Year 1**) of Product Office Operations. Three categories of resources have been assumed:

1. Product Office Management and Administration
2. Product Teams (Cross-Functional / Multi-Disciplinary)
3. ISD Go Forward Roadmap Workstream Teams

The **PO Management and Administration** team assumes the base minimum resources to launch the Product Office. The number of Product Teams will depend on the final scope of ISD.

The **Product Teams** are made up of cross-functional / multi-disciplinary business and IT subject matter experts. Product Team members will report to their current Manager in their existing functional groups but will be assigned on a full or part time basis to the Product team with full accountability for the Product Business and Technical Outcomes.

The **ISD Go Forward Roadmap Workstream** teams have been organized into two categories, 1) Team leader resources as a part of Product Office management team, and 2) ISD Go Forward Roadmap internal execution teams from across DHS, MNIT, Tribes and Counties. The first category is made up of Workstream leaders who are accountable to the Product Director for success of each workstream, and the second category are cross-functional subject matter experts and resources from across the entire enterprise to help conduct the planning activities defined by the Workstreams.

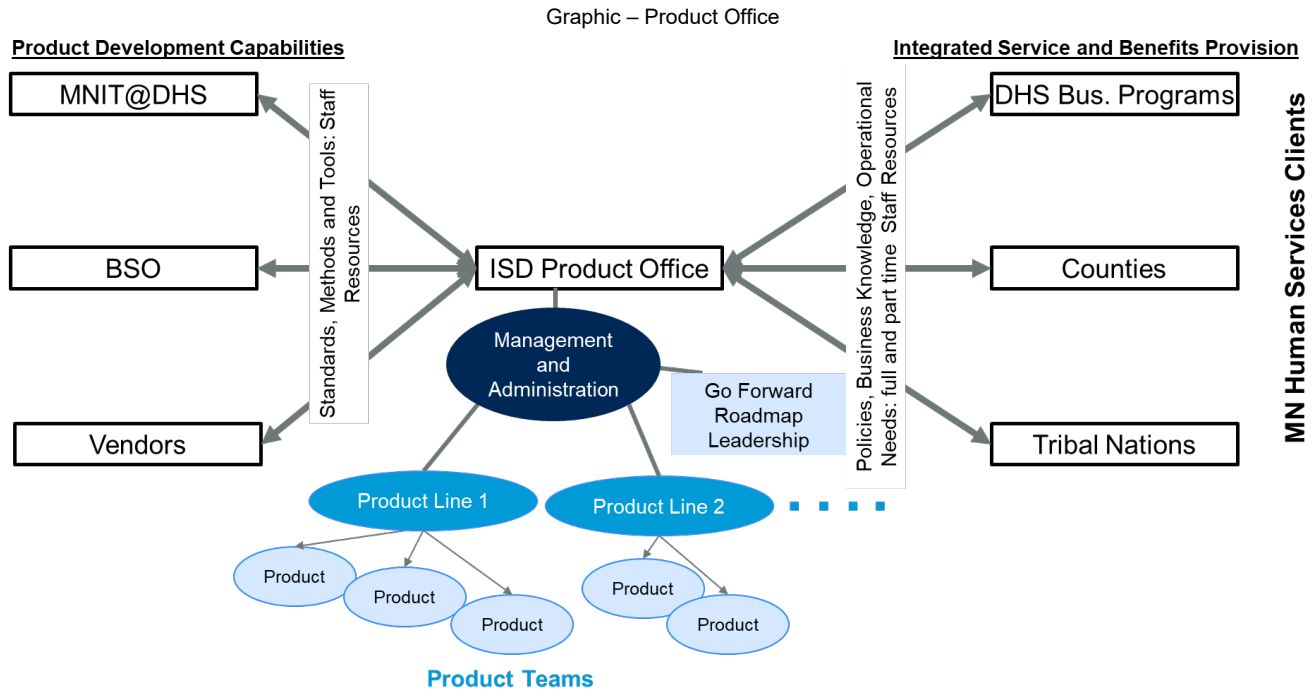
Once an Enterprise Scaled Agile methodology is selected, the ISD Product Office will consider use of experienced third-party resources for the Enterprise Scale Agile Coaching role, along with appropriate Agile orientation and training sessions for all levels of key stakeholders within business programs and MNIT.

Additional details on the estimated resources for the Product Office are included in the Attachment E.

Product Office Structure

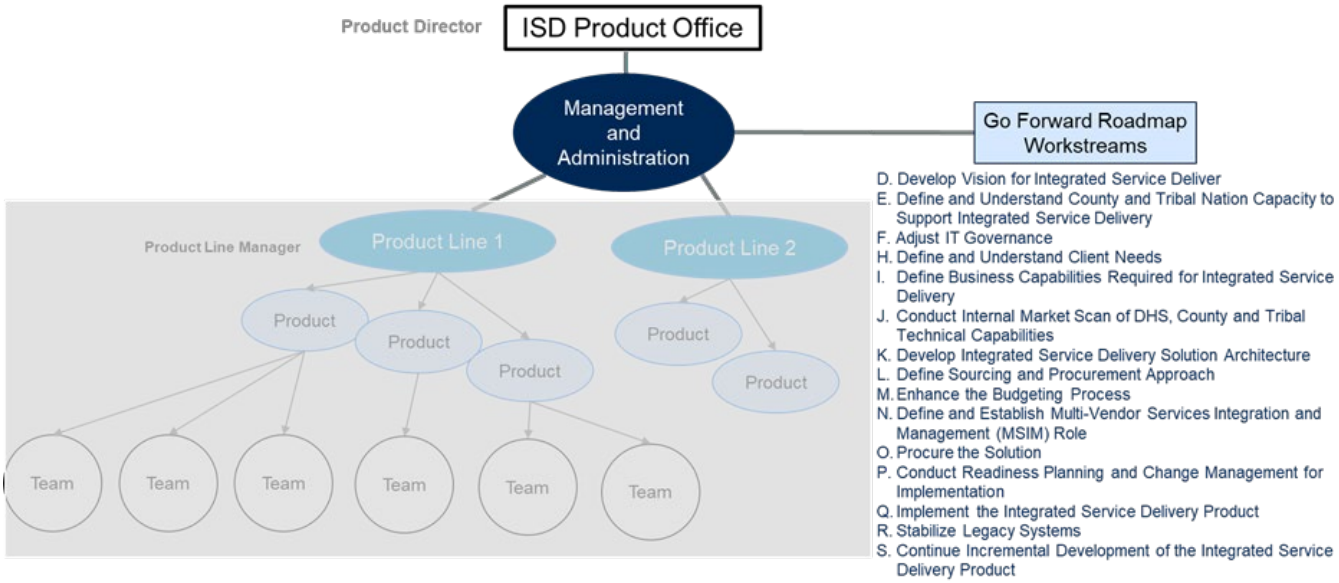
The Business led ISD Product Office will drive incremental development and delivery of products using agile and product management collaboration between client-facing activities at the state, county and tribal nation level as depicted in the figure below.

Figure 3. Product Office Structure and Resources



The ISD Product Office will provide leadership for several of the Go Forward Roadmap Workstreams. The Go Forward Roadmap identified several workstream needed to facilitate the work of the product teams and achieve the ISD vision. The ISD Product Office will lead and coordinate many of these activities as shown in figure 4 and listed below.

Figure 4. Product Office Leadership for "Go Forward Roadmap Workstreams"



Go Forward Roadmap Workstreams:

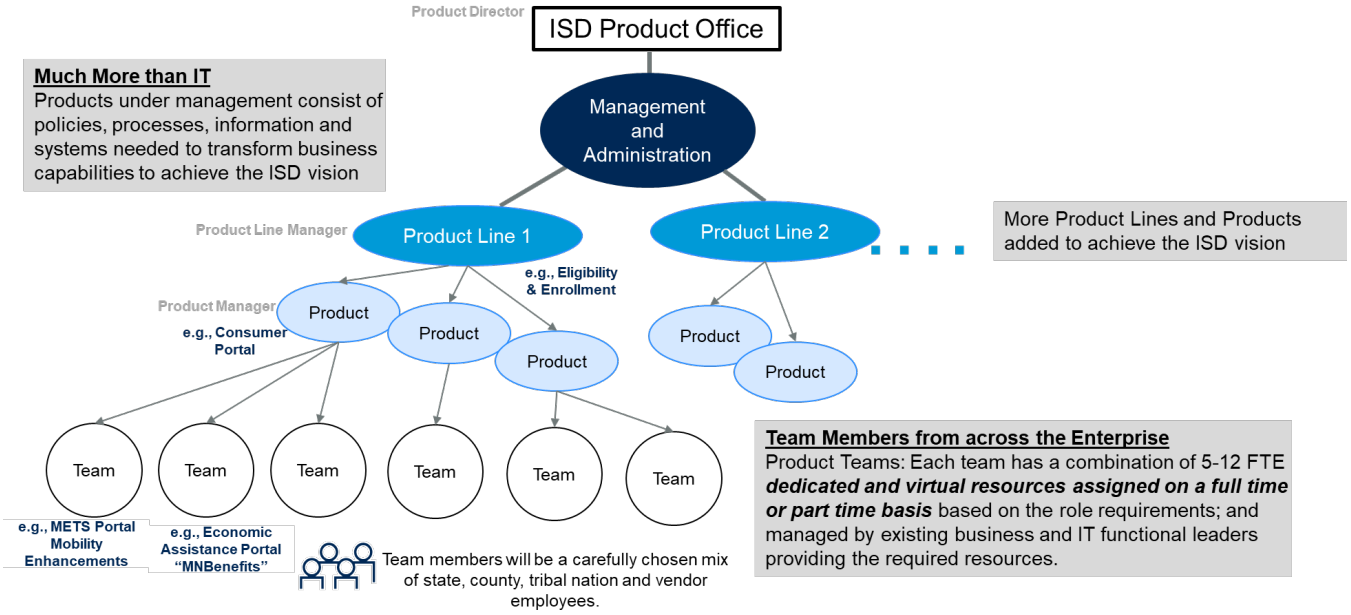
1. Develop vision for integrated service delivery
2. Define and understand county and Tribal Nation capacity to support Integrated Service Delivery
3. Adjust IT governance
4. Define and understand client needs
5. Define business capabilities required for Integrated Service Delivery
6. Conduct internal market scan of DHS, county and Tribal Nation technical capabilities
7. Develop Integrated Service Delivery solution architecture
8. Define sourcing and procurement approach
9. Enhance the budgeting process
10. Define and establish Multi-vendor Services Integration and Management (MSIM) role
11. Procure the solution
12. Conduct readiness planning and change management for implementation
13. Implement the Integrated Service Delivery product
14. Stabilize legacy systems
15. Continue incremental development of Integrated Service Delivery product

Roles and Responsibilities

The ISD Product Office will lead and coordinate the management of ISD product lines and products as depicted in figure 5 below. Products under management consist of policies, processes, information and systems needed to transform business capabilities to achieve the Integrated Service Delivery vision. Product Teams each have a combination of 5-12 Full Time Equivalent members in a carefully chosen mix of state, county, Tribal Nation and vendor employees. Dedicated and virtual resources including

staff are assigned on a full time or part time basis, based on the role requirements, and managed by existing business and IT functional leaders providing the required resources.

Figure 5. Product Office coordinates and manages IS Product Lines and Products



Key roles within the ISD Product Office include:

- **Product Office Director** — Responsible for the Product Office's strategy, design, development, enhancement, delivery, and cost models.
- **Product Manager** — Responsible for delivering valuable, innovative products for Integrated Service Delivery.
- **Product Line Manager** — Responsible for a group of related ISD products and building and managing the Product teams who develop and enhance product capabilities.
- **Product Owner** — Responsible for communicating the vision of the product to the agile team, defining and prioritizing deliverables in the team's backlog.
- **Scrum Master** — Responsible for coaching Scrum and Kanban teams to make progress, learn, and function at the highest level.
- **Software (Full Stack) Engineer** — Responsible for feature development and improving products with automation and risk mitigation.
- **DevSecOps Engineer** — Responsible for the design, development, and delivery of secure, scalable, and automated service architecture.
- **Client Experience Designer** — Responsible for uncovering user needs and simplifying complex systems to meet these needs.
- **Quality Assurance / Test Engineer** — Responsible for the implementation of risk-based testing and automation capabilities.
- **ISD Solution Architect** — Responsible for the architecture decisions for the product line and facilitates the overall solution design.

- **Vendor Manager —** Responsible for all technology and IT vendors for the Integrated Service Delivery (ISD) Product Office, including a combination of IT vendor contracts, performance, relationship, and risk management.
- **Stakeholder Governance Manager —** Responsible for providing direction and guidance to the governance participants and stakeholders at the state, county, and tribal nation level to enable the development and timely deployment of the best information technology solutions to meet the business and customer needs and priorities. This role supports the authority of the Product Office. The main purpose of this role is to ensure that the execution of governance is transparent in order to reduce confusion related to IT governance changes. This role will make sure the input from the variety of users (i.e., consumers, county, and Tribal Nation workers, etc.) and the final rationale for business prioritization is clearly communicated to all stakeholders.
- **Business Analyst / Subject Matter Expert (SME) —** Responsible for providing a deep understanding of relevant functional domains / programs to identify, define and document business processes and requirements. The business analysts create artifacts as appropriate, including business case documentation, scope documentation, and process flows; support delivery teams as they develop, test, and deploy solutions, including reviewing delivery team output to ensure requirements are correctly interpreted. They facilitate communications and determine software objectives that align with stated and unstated business needs.
- **System Analyst –** Responsible for serving as a primary contact for any questions related to how the system works. The system analyst partners with business analysts / SMEs to translate business requirements into technical specifications and partners with software developers and QA analysts to develop logical technical processes. The system analyst also performs basic cost-benefit calculations, interdependency analysis, and prioritization exercises related to systems changes.
- **Product Designer —** Responsible for leading the design of the ISD products and services working with people across the enterprise to define the product design process, apply the concepts and methodology, develop design deliverables, outline an experience improvement plan, and ultimately see the improvements through to completion. The Product Designer will have a business background with a focused interest and skills in business architecture and digital product design. The focus of this role is to oversee the design process of a product and across multiple products over time.
- **Grants and Budget Manager Profile —** Responsible for managing multiple contracts from a variety of sponsoring agencies including but not limited to Federal Financial Participation (FFP). This position would comply with required quarterly, monthly, and biannual grant submissions.
- **Organizational Change and Communications Manager Profile —** Responsible for interfacing with various stakeholders across the ISD enterprise; and for leading, directing, coordinating, and providing visibility into the organization's change management efforts for ISD.
- **Agile Coach** — Responsible for evangelizing and accelerating the adoption of agile ways of working within the ISD product office and teams by providing training and coaching to building teams' maturity in agile approaches, measuring progress to overcome obstacles, and driving continuous improvement.
- **Lead Software Engineer —** Responsible for overseeing teams of software engineers, and providing leadership, vision, and direction for the software engineering organization.
- **ISD Enterprise Architect** — Responsible for building a holistic view and roadmap of the technology strategy, processes, and information technology roadmap. The ISD enterprise architect must partner with both business and technology groups to ensure that the proposed

technical solutions not only align with the company's overall objectives, but also ensures that both groups enable and drive each other to meet the needs of the company's mission and vision.

- **Integration Engineer —** Responsible for developing a strategy and partnering with delivery teams to design, develop and maintain efficient and high-quality integrations connecting data, applications and third parties that support business processes and customer needs.

Note: Detailed Job Descriptions for roles within the Product Office are included in Attachment D of this document.

Anticipated Interaction and Collaboration

The ISD Product Office will be led by technology savvy business leaders (Product Leadership — ISD Product Director, Product Managers, Product Owners) who will use a unique mix of skills, including creativity, client engagement experience, strong time management and prioritization, excellent communication (both verbal and written) and the ability to lead through collaboration with effective stakeholder management.

The product leaders will work with a wide range of teams — from DHS program leadership to County and Tribal Nation leaders, and delivery teams to drive product success by updating and fine tuning the IT Governance practices accommodating agile values and principles, enabling the success of the new operating model without breaking the self-organizing culture that makes lean and agile delivery organizations successful.

Each Product Team will have a formal Product Owner role who is a fully empowered representative of a Business Owner and works with the Product Manager and "Product Board" (setup by the ISD Stakeholder Governance Manager when multiple stakeholders are involved) made up of appropriate representatives and stakeholders from relevant DHS Program areas, Counties, and Tribal Nations, to determine the highest value and priority business capabilities that need to be developed and delivered.

The 5-to-12-person Product Teams will be made up of business and technology subject matter experts who will bring required expertise in policy, practice, desired business model, and technology to deliver against specific client and business outcomes identified for each increment of software development focused on needed business capabilities and features to achieve the outcomes.

All Product Teams will have participation and contribution from the dedicated "Enterprise Architect" and "Enterprise Solution Architect" who are assigned to ISD Product Office by the planned DHS MNIT Enterprise Architecture Office. These two architecture planning resources will be assigned on a full-time basis by the Chief Enterprise Architect to the Office and will ensure alignment and/or compliance to Enterprise Architecture principles and strategies developed by the Enterprise Architecture office. Where there is no existing documented guidance available, they will engage the Chief Enterprise Architect and other EA office team members to develop and finalize specific recommendations for the ISD Product Office Product Teams and follow the proper processes to propose new architecture standards for approval by the established Enterprise Architecture governance processes.

The business led ISD Product Office will proactively engage all appropriate business stakeholders and technology delivery resources to deliver the committed client and business outcomes for each program increment / delivery cycle.

RACI Chart

The following table summarizes the participation (RACI – responsible, accountable, consulted, and informed) of some of the key roles for the product lifecycle management phases, key activities, and tasks for the Product Office in order to illustrate the roles, responsibilities, and interaction of key

stakeholders during the product lifecycle phases. The ISDPO leadership team will continue to add other critical roles, lifecycle phases, and activities to help increase transparency and clarity over time.

Figure 6. Product Office RACI

Product Management Phase	Key Activity	Task	Product Director	Product Line Manager	Product Manager	MNIT Leadership[1]	EAB[2]	Product Advisory Board[3]
Product Funding	Product Budget Strategy	Product Budget Allocation	R	I	I	C	A	C
ISDPO Staffing	Product Team Staffing	Product Team Assignments	R	C	C	R	C	A
Product Planning	Create the Product Strategy	Define Product Strategy	R	A	A	C	C	C
		Approve Product Strategy	A	R	R	C	C	C
Product Development	Build Compelling Customer Experience	Approve product UX R&D	A	R	R	C	I	C
	Accelerate Product Development	Select development tooling and technology	I	C	C	A,R	I	I
	Prioritize Product Investments	Estimate Effort	C	A	R	C	I	I
		Prioritize User Stories	A	R	R	C	I	C

1. **MNIT Leadership** includes the Director of MNIT@DHS and chief architects at MNIT@DHS and MNIT Central
2. **EAB (Enterprise Architecture Board)** the overall governance entity for all aspects of systems and IT investments and change
3. **Product Advisory Board** created to increase engagement across all parts of the collaborative on the development and management of ISD products. Includes DHS divisional, MNIT, County and Tribal Nation representatives.

R Responsible: Person/Entity who does the task

A Accountable – Person/Entity who has the final say and is held accountable for the task

C Consulted – Person/Entity that needs to be consulted and contribute to the task

I Informed – Person/Entity that needs to be informed about the decision and actions

Attachments

Attachment A — ISD Product Office Roadmap

ISD Product Office Launch Roadmap Purpose and Scope

The ISD Product Office is an organizational unit being established to enable and support a lean / enterprise agile approach to business and IT transformation for the Integrated Service Delivery (ISD) modernization efforts.

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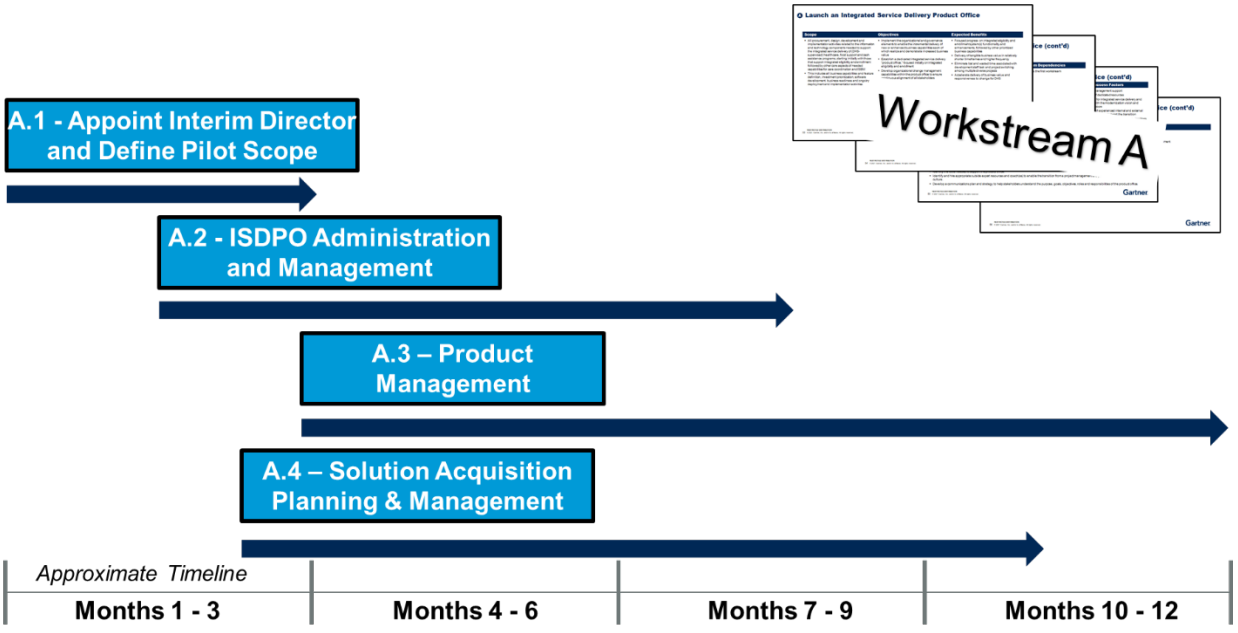
The ISD Product Office will define and evolve the products and be the authority and owner of the product roadmaps for the Product Line, with success defined by business and client outcome measures and targets.

DHS is engaged with MNIT on an effort to introduce product management at an enterprise level, known as P2P. The ISD Product Office will be aligned with P2P and related standards.

The ISD Product Office Charter is being developed to better define the Product Office focus, goals, objective, and approach. This roadmap describes the launch and the initial and first year of ISD Product Office activities and will be incorporated into the final ISD Product Office Charter.

This roadmap is in the form of an elaborated second level of detail of the “ISD Go-Forward Roadmap” that was developed as a part of the previous Gartner engagement.

ISD Product Office First Year — Roadmap Overview



Resource and Cost Estimates Assumptions

The following assumptions were used for the time frame and required resource estimates for the creation of the Roadmap:

- Estimates are "order of magnitude" figures based on Gartner's experience of the levels of effort and costs for similar HHS projects in other States
- Detailed plans and estimates for these Workstreams have not been completed
- These estimates are intended to support high-level planning
- A Person Year (PY) indicates the total amount of human resources required independent of duration. A PY is equal to 2,000 hours. It does not provide an indication of the number of resources or full-time equivalents. The work may be distributed among one or more resources to best execute the workstream — thus, 1 PY could translate into four staff resources spending 25% of their time in one year on the effort
- The time frame estimates assume any gaps in available MN staff or skills will be addressed by the hiring of contract resources and consulting services
- Estimates for the costs of acquiring these services (from competitively priced consultants and contractors with substantial relevant experience) are included in the recommended resources section

Workstream Mini-Charter Template Definitions

Scope	Objectives	Expected Benefits
▪ Overall scope of the workstream including initial focus areas where relevant	▪ Primary objective(s) of the workstream	▪ Primary expected benefit(s) of the workstream
Timeline / Duration	**Recommended Resources**	**Workstream Dependencies**
▪ Estimated duration of key segment(s) of the workstream	▪ Estimated resources and resource types required to deliver the workstream ▪ Internal Resources include staff working in any of the collective organizations (i.e., DHS, MNIT, Counties, Tribal Nations) ▪ Internal Resources are estimated in Person Years ▪ External Resources are listed with an estimated cost range to procure the required services	▪ Other workstreams that must be started or completed for the workstream to begin
Deliverables	**Risks**	**Critical Success Factors**
▪ Key deliverables to be produced as part of the workstream	▪ Risks to the success of the workstream	▪ Elements that are required for the workstream to be successful
High-Level Milestones / Activities		
▪ High-Level Milestones and Activities to be completed as part of the workstream ▪ Milestones and activities are listed in approximately sequential order		
KPIs		
▪ Key Performance Indicator(s) for use in measuring and understanding progress toward achieving the workstream objective(s)		

ISD Product Office Roadmap — Elaborated Workstreams

A.1 — Appoint Interim Director and Define Pilot Scope

Scope	Objectives	Expected Benefits
▪ All actions required to ensure the ISDPO starts work in alignment with the agreed and approved ISDPO charter ▪ Focus on immediate actions necessary to enable other related workstreams	▪ Facilitate transparent governance in the ISDPO launch by establishing the ISD Product Advisory Board ▪ Setup and launch (largely one-off) activities that allow the ISDPO to be established ▪ Make initial ISDPO assignments	▪ Get the ISDPO up and running as quickly as possible ▪ Enable the key ISDPO roadmap Administration and Management, Product Management and Solution Acquisition Management activities
Timeline / Duration	**Recommended Resources**	**Workstream Dependencies**
▪ The first 30 – 90 days in the life of the ISDPO	▪ Interim Product Director for 50% (0.125 PY) ▪ Team of additional BSO resources (0.5 PY) ▪ Executive Leadership and ISDPO Planning team for oversight (0.125 PY)	▪ No prior dependencies ▪ A.2, A.3 and A.4 are all dependent upon A.1
Deliverables	**Risks**	**Critical Success Factors**
▪ Interim Product Director appointment ▪ ISDPO Organizational announcement communications ▪ Finalized ISDPO Product Director Job Description, classification and acquisition plan ▪ Product Director appointment ▪ Initial ISD Product Line structure (specifying the products for the 3 initial teams and the first iteration of the ISD product structure)	▪ Interim Product Director cannot allocate the required amount of time and effort to this due to other responsibilities ▪ Management and staff resistance to creation of the ISD Product Office ▪ Lack of active business sponsor participation ▪ Inadequate organizational change management ▪ Lack of adequate funding	▪ Executive management support ▪ Allocation of dedicated resources ▪ Availability of internal and external staff to man the start-up team

High-Level Milestones / Activities

- Identify and assign a senior DHS leader as the Interim ISDPO Product Director
- Finalize the organizational placement and related communications –
  - Further refine organizational structure and reporting relationships as part of the ISDPO Charter
    - Create ISD Product Advisory Board to review and advise on key ISDPO activities (this board includes representatives from DHS, MNIT, Counties and Tribal Nations)
    - Finalize organizational placement of the ISDPO (recent announcement from DHS Leadership has addressed this activity)
    - Agree on product content authority for ISD[1] delegated from the EAB
    - Report on activity and progress to the EAB
  - Obtain leadership approval (DHS, Counties, Tribes and State CIO).
  - Publish the organizational change and conduct supporting "town-hall" events to answer leadership questions and enhance organizational buy-in
- Define and establish the start-up team (initial Management and Administration ISDPO "core" team).
- Recruit the permanent Product Director
  - Conduct a talent search
  - Evaluate, select and appoint the Product Director
  - Arrange orientation and "on-board" the Product Director
- Finalizing the scope of the initial 3 product teams:
  - Draft the Product Line structure
  - Based on the Draft Product Line Structure determine the scope of three products teams
  - Document the product scope and focus (in terms of outcome measures) for each of the three teams

KPIs

- Time to establishment of the product office
- Time to operation of the start-up team and appointment of the interim Product Director
- Understanding and buy-in of key stakeholders

[1] "product content authority" is the authority to decide exactly what capabilities and features the product consists of and the business value based prioritization framework

A.2 — ISD Product Office Administration and Management

Scope	Objectives	Expected Benefits
▪ Definition, establishment, and approval of key ISDPO staff, processes, and tools, including establishment of Organizational Change capabilities	▪ Establish a dedicated integrated service delivery "Product Office," (ISDPO) for the business transformation focused initially on integrated eligibility and enrollment ▪ Develop organizational change management capabilities within the product office to ensure continuous alignment of all stakeholders	▪ Effective Organizational Change Management capabilities, leading to increased adoption of product management principles and support for the Integrated Service Delivery vision ▪ Accelerated delivery of business value and responsiveness to change for DHS
Timeline / Duration	**Recommended Resources**	**Workstream Dependencies**
▪ 1 month planning ▪ 3 months development of Administration and Management processes and structures ▪ Ongoing operations	▪ Interim Product Director for 50% (0.125 PY) ▪ Executive Leadership and ISDPO Planning team for oversight (0.125 PY) ▪ The total staff of the ISDPO core administration and management team is expected to be 9.5 PYs in the first year ▪ Team of additional DHS resources (0.5 PY)	▪ No prior dependencies 0ther than Workstream A.1 Appoint Interim Product Director and Set Initial Product Scope
Deliverables	**Risks**	**Critical Success Factors**
▪ Updated Product Office Charter, including scope definition and Product Line structure ▪ Product office resource plan, including updated job descriptions, roles and responsibilities ▪ ISDPO organizational definition and staff assigned ▪ Organization change management, communication, and training plans	▪ Management and staff resistance to creation of the integrated service delivery product office ▪ Any difficulty with identifying, acquiring or funding the staff resources that are needed to operate the ISDPO Administration and Management functions ▪ Lack of active business sponsor participation ▪ Inadequate organizational change management ▪ Lack of adequate funding	▪ Agency Executive support ▪ Allocation of dedicated resources ▪ Full support for integrated service delivery and the modernization vision ▪ Appropriate ISDPO staff training in their roles ▪ Availability of experienced internal and external staff and coaches to support the transition ▪ Connections with external partners, including from Counties and Tribal Nations ▪ Transparent governance

High-Level Milestones / Activities

- Refine Job Description documents and work with DHS Personnel/Human Resources to appropriately classify the roles
- Establish an initial (pre-procurement) staffing policy
- Post the initial ISDPO foundation team job roles for internal and external recruiting (initial job roles will be defined in final ISDPO Charter)
- Prioritize recruiting activities for the most senior job roles, and fill positions as quickly as possible with internal transfers and external hires
- Work collaboratively with agile methodology selection team (Workstream B) to plan and execute suitable enterprise agile orientation and training sessions for all appropriate ISDPO and DHS staff
- Mentor and direct the 3 initial teams
- Establish foundation for governance and stakeholder engagement structures and processes defined in the ISDPO Charter
- Refine the Product Line structure and define the process for maintaining and updating the structure to align with future needs
- Identify the tools needed to support the ISDPO
- Plan for organizational change management resources and communication planning for the product office and its intended business outcomes
- Develop a communications plan and strategy to help stakeholders understand the purpose, goals, objectives, roles and responsibilities of the product office
- Define success criteria and progress metrics for ISDPO
- Update the ISDPO Charter to incorporate changes and increasing level of detail resulting from the activities of this workstream

KPIs

- Time to identify and move existing staff to new roles within the product office and acquire required additional staff
- Adoption of Product Management practices
- Time to establishment of stakeholder engagement and Organizational Change Management practices

A.3 — Product Management

Scope	Objectives	Expected Benefits
▪ Setup and launch of 3 (Three) Product Teams to help pilot and demonstrate early success with the ISDPO ▪ Focus of the 3 initial Product Teams to be on high value and visible value-added functionality to the consumers and the case workers ▪ Product definition of these teams finalized in A.1	▪ Launch pilot Product Teams to gain experience in working successfully in small, cross-functional, empowered teams ▪ Deliver value early and incrementally to key stakeholders	▪ Build momentum towards transforming how IT can more effectively deliver software and new business capabilities ▪ Build confidence within the teams with new collaborative software development practices ▪ Develop strong relationship between the Product Teams and the state, County, Tribal Nations and consumer representatives

Timeline / Duration	Recommended Resources	Workstream Dependencies
▪ The Product Teams will operate during the first year of ISDPO operations	▪ Internal Resources: — Each of the three Product Teams will be made up of 5-12 resources using the Product Team staffing model guide — This will include the Product Owner, Scrum Master, Software Engineer(s), Tester(s), and Solution Architect ▪ External Resources: — Agile Coaches and Trainers ($100-$200K)	▪ Workstream A.1 Appoint Interim Director and Set Initial Product Scope for product definitions ▪ Workstream A.2 ISDPO Administration and Management

Deliverables	Risks	Critical Success Factors
▪ Product team charters for the 3 initial product teams ▪ Product Roadmap ▪ Software deliverables from each Product Team's efforts ▪ Supporting Documentation for Operations	▪ Lack of Business participation and support ▪ Inadequate resources assigned to a Product Team ▪ Lack of effective organizational change management	▪ Selection of suitable candidates for each Product Team ▪ Appropriate ISDPO staff training in their roles ▪ Effective partnership and collaboration with the business representatives ▪ Visible executive support ▪ Transparent governance

High-Level Milestones / Activities

- Identify and launch three Product teams staggered by two to four weeks (Note: these three product lines are "pilots" to inform the larger product structure. The Product Line structure will continue to evolve based on needs of the ISD and the Solution/Product Roadmap)
- Identify and assign a Product Owner for each team
- Conduct Product Increment planning session and dive deep into the product history and the current backlog of planned work.
- Build on a foundation of Scrum or Kanban at the team level
- Embrace a wide range of modern technical practices — for example, extreme programming (XP), behavior-driven development (BDD) and hypothesis-driven development (HDD)
- Facilitate the sharing of proven lean and agile practices through communities of practice
- Build relationships with all relevant internal stakeholders and ensure that their input is being incorporated into product roadmap discussions.
- Connect directly to the public / beneficiaries as well as County and Tribal Nation caseworkers in order to begin building a process for gaining quick feedback from the field
- Develop a plan of action (i.e., Program Increment plan) for each product team with clear priorities and milestones (Have buy-in for this plan with internal DHS, County and TN stakeholders but be primarily driven by empathy for the customers)
- Successfully execute on the short-term items on the team roadmap, with major milestones hit on time or close to it
- Begin planning and obtaining buy-in from Product Office Leadership team for Product Management process changes
- Decide on needed metrics and make plans to achieve them
- Hit the short-term Key Performance Indicators (KPIs) and Objectives and Key Results (OKRs) and set new ones
- Close the loop with the Public, DHS, County, and Tribal Nation stakeholders on what you've accomplished
- Use preexisting metrics to kick-start a process of continuous improvement and decide what new metrics to begin gathering next
- Leverage the positive reputation you've gained from your successes to start impacting broader processes and culture

KPIs

- Product Team fully staffed
- Burn up plans monitored against the team story point output
- 100% of Agile process ceremonies are conducted

A.4 — Solution Acquisition Planning & Management

Scope	Objectives	Expected Benefits
▪ Identification of leadership resources for Workstreams related to selection and acquisition of technology and services for the Eligibility and Enrollment capabilities ▪ This includes Workstreams H, I, J, K, L, N	▪ Identify the leadership resources for each of the Solution Acquisition Planning workstreams ▪ Oversee the successful execution of solution acquisition related activities	▪ Accelerate the go to market strategy for acquisition of technology and services for Eligibility and Enrollment ▪ Receipt of comprehensive proposals from the most qualified vendors
Timeline / Duration	**Recommended Resources**	**Workstream Dependencies**
▪ 8 months if all 6 Workstreams are executed in parallel.	▪ Internal Resources: – Product office and EA staff to define the model and survey of capabilities to be inventoried and analyze the results – Est. 1.5PY – Workstreams leadership resources – Est. 5.5 PY	▪ Workstreams A.1 and A.2
Deliverables	**Risks**	**Critical Success Factors**
▪ Formal Allocation of Resources for initial workstreams ▪ Launch of Initial Workstreams ▪ Workstream Charters	▪ Lack of visible DHS Business Leadership and Executive Support ▪ Lack of Availability of resources ▪ Competing initiatives	▪ Successful engagement of State, County and Tribal Nation stakeholders ▪ Adequate level of funding for planning effort ▪ Assignment of expert resources with a can-do attitude to each workstream

High-Level Milestones / Activities

- Identify resources (leadership and execution) for each of the Workstreams
- Validate and flesh out the plans for each Workstream
- Initiate each of the six Workstreams
    H. Define and Understand Client Needs
    I. Define Business Capabilities Required for Integrated Service Delivery
    J. Conduct Internal Market Scan of DHS, County and Tribal Technical Capabilities
    K. Develop Integrated Service Delivery Solution Architecture
    L. Define Sourcing and Procurement Approach
    M. Enhance the Budgeting Process
    N. Define and Establish Multi-Vendor Services Integration and Management (MSIM) Role
- Identify the resources need to produce the required deliverables for each Workstream
- Identify and metrics and key performance indicators to evaluate the success of each Workstreams

KPIs

- Number of Workstreams initiated vs. workstreams required to launch
- Timeliness of Workstream start
- Number of skilled and talented staff assigned to each workstream

Attachment B — ISD Product Office Communications Strategy and Plan

Strategy Definition and Purpose

It is anticipated that ISD Product Office will impact the working life of a broad range of DHS, MNIT, County and Tribal Nation staff to widely varying degrees. The purpose of the Communications Strategy and Plan is to organize communications activities so that all the various audiences are fully informed in a timely fashion, enable transparency, and help manage stakeholder expectations.

This strategy document should be used to help communications efforts around the ISD Product Office launch and be the basis of the OCM and communications work included as part of workstream *A.2 — ISD Product Office Administration and Management.*

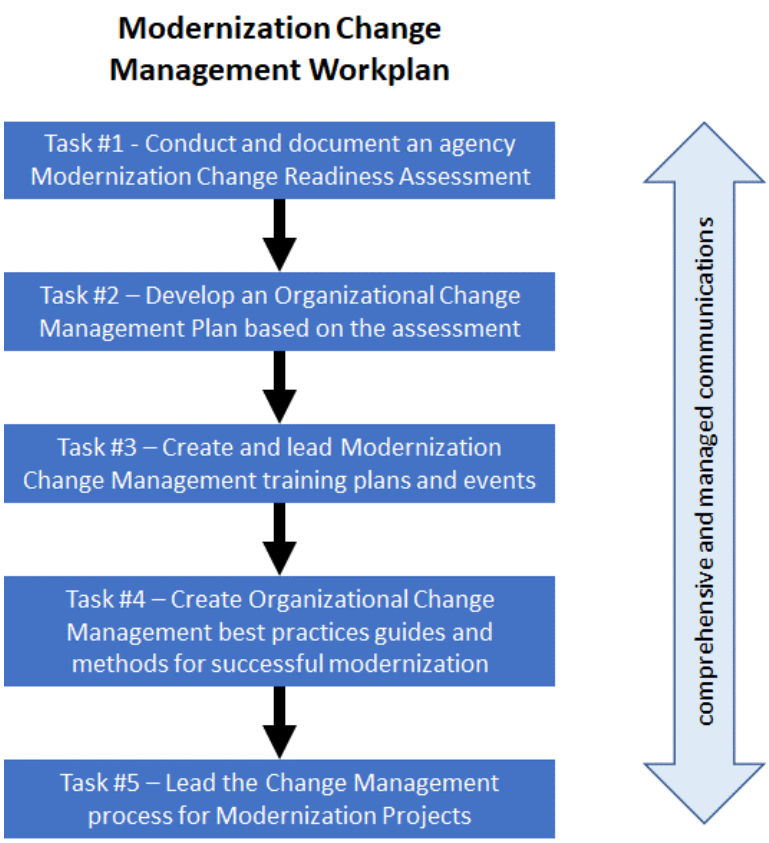
Communication is Critical for effective Change Management

Change management describes the processes, tools, and techniques for reducing and managing resistance to change when implementing process, technology, or organizational change. Change management is about managing change to realize business results.

At every stage comprehensive and managed communications are essential to establishing broad awareness and understanding, driving stakeholders from various levels of resistance through acceptance to ownership achieving high levels of participation, and ensuring Product Management can be fully integrated into the organization, its culture, and practices.

A change management approach has been designed to support the ISD Modernization efforts — see Figure 1 below.

Figure 7. Modernization Change Management



Objectives

- Promote Awareness —
  - Ensuring that stakeholders understand the focus, scope, and overall vision for Modernization, ISD and the ISD Product Office.
  - Provide basic knowledge about ISD Product Management and the ISD Product Office, the timelines/milestones, benefits, and the importance of the stakeholder's role in supporting the better business outcomes that will result from ISD and the work of the product office.
- Ensure Understanding
  - Application of best practices in communication to promote stakeholder's understanding regarding the need for the change for Product Management, its vision and scope, the realistic benefits to be achieved, and the impact that the future state for DHS ISD will have on their role and work
- Enable Participation
  - Facilitating and gaining stakeholder participation and input. Developing effective participatory mechanisms to solicit, analyze, verify, and apply stakeholder input at key points, through multiple channels, as product management is introduced.
  - Readiness Assessment, Training and knowledge transfer conducted in an iterative manner in support of useful participation in Product Management and the work of the ISD Product Office.
- Move through Acceptance into Ownership
  - Moving stakeholders from resistance to acceptance to ownership of Product Management and its results.
  - Key to this is enabling and supporting leadership and managers to be effective change champions.
- Supporting Organizational Integration
  - Communicating in alignment with the seamless integration of Product Management into the organizational culture, structure, operations, and in meeting the needs of those served

Audience Analysis

- There is a wide audience for ISD Product Office communications across the collaborative of DHS administration and program staff, MNIT@DHS staff, County and Tribal Nation staff and external partner, e.g., community groups involved in the delivery of services and vendors for the design and development of modernization processes and systems.
- Many of the target audiences for ISD Product Office communications will evolve over time and as the ISD products are defined and product teams formed.
- In general, there are three major audience types that will require distinct approaches to communication and change:
  - **Leadership:** From the Commissioner through various levels of management in all the key organizational entities in the collaborative (DHS, MNIT@DHS, Counties and Tribal Nations).
  - **Stakeholder Community:** The broad population who are involved in and touched by the delivery of services managed by DHS Programs.
  - **Product Team Members:** This population will start small but grow substantially as the approach is implemented and the ISD Product Office moves from inception into mainstream operation. This includes individuals from a variety of roles across the collaborative and its partners. What marks them out will be their intense and dedicated involvement in the work of Product Teams.
- Within each of these groupings there will be many segmented populations identified as specific communications targets.
- The stakeholder analysis that has been conducted by the Modernization Change Management Team will provide invaluable input for the further analysis and stratification of stakeholder groups when planning and executing the details of the ISD Product Office Communications Strategy and Plan.

Messages Delivered using Channels by Media

Key to communicating across the various stakeholder segments over the lifecycle of ISD Product Office launch and ISD product development and management is the development of "messages." These messages should follow the following guidelines:

- All messages will be audience-specific
- Every key message will be communicated formally
- Messages will be distributed through an appropriate channel
- The team will communicate what people need to know before they need to know it
- Communication will be tailored, based on what people need to know
- All critical communications must be approved by management prior to distribution
- Only the communications team will be able to distribute official press releases
- Project-wide meetings will be held at all important milestones
- Regular, unbiased reporting will be undertaken
- The project team will listen and act on feedback

Communications Channels include: In-person and virtual (online) meetings, recorded and published items (e.g., printable documents, video clips and podcasts), interactive websites and newsletters published on a regular basis.

Roles and Responsibilities

The ISD Product Office Organizational Change and Communications Manager and their team will have primary responsibility for the Communications Strategy and Plan. As with other parts of the ISD Product Office this role may be assigned to staff in the existing Modernization Change Management team providing dedicated support to the ISD Product Office.

Additional details on the role and scope of the ISD Product Office Organizational Change and Communications Manager is included in the draft job description (Attachment D).

Key Activities

- Immediate / Short Term
  - Assign the OCM and Communications Team
  - Confirm purpose and objectives
  - Using the Modernization stakeholder analysis and the ISD Product Office Charter identify and stratify the audiences relevant to the ISD Product Office Communications Strategy and Plan
- Establish the Foundation
  - Create initial messages for ISD Product Office introduction and launch including unique value propositions that directly explain how the ISD Product Office will support stakeholders' priorities, providing transparency and visibility into the process, from the launch to the ISD Product Office to its full operation. Engage key stakeholders early in the process.
  - Define key communication vehicles for a variety of events including: Major announcements, in-depth onboarding, and regular updates
  - Define the ISD Product Office Communications Strategy and Plan governance process (how changes to this plan are managed and approved)
  - Define measures of success aligned with the objectives for use in the regular ISD Product Office Communications Strategy reporting
- Ongoing:
  - Rollout of onboarding training and continuing announcements and regular updates
  - Obtain stakeholder feedback using mechanisms including: Stakeholder surveys, stakeholder focus groups, and participation and attitude monitoring
  - Regular Communications Strategy reporting against the objectives
  - Collect performance data and develop a business-facing scorecard to present ISD Product Office's progress against established performance metrics
  - Actively communicate to business to effectively market the ISD Product Office plan, function, and value

Attachment C — ISD Product Office Workstream A1 Product Team Examples and Considerations

The following are some key considerations for the launch of the Integrated Services Delivery Product Office in support of the Roadmap presented in Attachment A. One of the Workstream A1 deliverables is the **identification and launch of three Product Pilot teams**.

It is Gartner's recommendation that the initial Product Team Pilots be focused on activities that can have a direct impact on benefits applicants, existing beneficiaries, and/or the County / Tribal Nation Case Workers. Accordingly, Gartner has provided some example pilot Product Teams for the "Integrated Benefits Screening & Application" Product:

- Leveraging agile development efforts, such as Code for America agile efforts, to deploy a streamlined Application Portal for Economic Services and successfully deploying the developed application functionality to all Counties.
- Introducing improvements in usability, navigation, time to task completion on the METS "Healthcare" Portal UX (User Experience), as well as easy access and support for mobile smartphones.
- Experimenting with the development and implementation of an integrated benefits screening client portal that can help enable some of the foundational screening capabilities envisioned by ISBM.

Once the ISD Product Office identifies and selects the three pilots, they should consider the following:

- The Backlog of Features or detailed requirements for each of the pilot Product Teams would be the responsibility of the assigned Product Manager and Team Product Owners.
- The focus should be on defining a Minimum Viable Product (MVP) or a set of useful enhancements for release into production within 4-6 months of each Product Team being assigned, and for each of the Product Teams to have at least two releases into production in the first year of the teams' launch.

Attachment D — ISD Product Office Job Descriptions

Product Director Profile

The Product Office Product Director is the owner of the ISD Product Office and is accountable for its strategy, design, development, enhancement, delivery, and cost models. The role ensures that the ISD products and capabilities are developed and maintained using sound business and technology management practices and it supports business transformation goals and benefits as defined by the Integrated Services Business Model (ISBM).

Key Responsibilities

Business Management

- Consults with County and Tribe representatives and state Program leadership to assess and anticipate current and future product requirements and develop a long-term action plan
- Manages the product lines' budget and makes informed and dynamic investment prioritization decisions
- Works with stakeholders to continually optimize the governance and decision-making processes within the product line
- Develops service-level agreements for the product lines' business outcomes
- Builds and attracts world-class technology talent for the products and product line teams
- Collaborates with DHS, MNIT, County and Tribal Nation leadership, federal partners, and legislature to determine the right product line cost model and facilitates demand planning and management conversations
- Defines product line cost models based on an understanding of service levels and cost structures of similar organizations in the public sector industry

Technology Management

- Coordinates with ISD enterprise and solution architects to align product line and other architectures
- Oversees product line operations and guides continuous improvement efforts to support business outcomes
- Defines, tracks, and communicates product line-specific objectives and key results (OKRs) and KPIs to improve the product line's adoption and performance
- Works with other product line / office leaders to avoid duplication and identify interdependencies
- Manages vendor relationships related to the product line and aligns vendor products and services with enterprise strategy and product line objectives
- Implements industry standards and development methodologies, including Enterprise Scale Agile and DevSecOps, within the product line to increase its responsiveness and growth

Business Transformation

- Acts as the point of contact for the product office and works closely with County, Tribe and State relationship managers, BSO and MNIT functional leads as required
- Collaborates with business partners to transition business-led technology experiments to the product line for scaling, wherever feasible
- Helps lead and support business model transformation and recommends business process changes for better product line adoption
- Applies expertise in design thinking and data science to ensure customer-centric experiences
- Identifies and evangelizes business and technology trends that can improve the product line's business outcomes
- Contributes to embedding digital opportunities in business strategy, including the agency's product and channel strategies

Product Manager Profile

Each Product Manager will determine and oversee delivery of the strategy and roadmap for their products to achieve business outcomes and financial objectives. Their responsibilities include coordinating with IT, business, and financial stakeholders to set priorities, managing new development and operations, and providing direction and oversight to product teams. They will lead the day-to-day efforts for one or more products in the ISD Product Line, with a deep understanding of the ISD landscape and how best to improve the access to benefits and integration of services through technology. The role reports to the Product Line Manager or Product Office Solution Director.

Key Responsibilities

- Primarily:
  - Empowered to make decisions regarding the product capabilities on the firm's behalf.
  - Responsible for establishing the product vision, product discovery, and product roadmap.
  - Serves as the sole "content authority" for the product.
  - Responsible for defining and prioritizing the product backlog (a prioritized set of features) to deliver a whole, valuable product.
  - Participation in the vendor selection process
- Serve as product manager for multiple, related products as needed.
- Develop a deep understanding of business goals and processes to inform product priorities and improvement recommendations.
- Develop strong relationships and regularly communicate with state, county and tribal nation partners and customers to shape the product strategy, surface, and prioritize need and deliver on ISD objectives.
- Lead product strategy, planning, and life cycle management efforts.
- Monitor business, market, and technology trends to inform product strategy and proactively propose new solutions.
- Establish product vision, roadmaps and release plans that satisfy requirements and achieve business outcomes.
- Serves as the sole "content authority" for the product.
- Contribute to translating business requirements into actionable product and technical requirements.
  - Own the day-to-day backlog and delivery for ISD products, working with the product team to write user stories, acceptance criteria, and prioritize the backlog
  - Lead a multi-disciplinary team of design, research, and engineering to test and develop new solutions that improve the delivery of safety net benefits in several states.
  - Empowered and authorized to balance client needs with caseworker and business needs across the various programs
- Continuously monitor and evaluate product performance and proactively champion product improvements via key product performance indicators
- Determine internal and contract/external resources and skills required for the product team to deliver on the product roadmap.
- Guide the product engineering team to scope, plan and deliver work, applying established delivery methodologies and standards (e.g., agile methods) and best practices (e.g., reusability).
- Proactively identify and resolve blockers to achieve business objectives for the product, including technical and resourcing challenges.
- Ensure alignment and adherence to corporate, financial and IT standards (e.g., architecture, compliance, security).
- Increase adoption and consumption of product capabilities.
- Manage investment decision making and finances for the product, taking a return-on-investment approach to increasing the value while minimizing product costs.

Product Line Manager Profile

The product line manager is responsible for a group of related ISD products. The product manager for each of the products that comprise the product line report to the product line manager. The product line manager will work with internal stakeholders and external strategic partners to manage ISD product teams to ensure sustainable impact (financial, systemic, and technological) of the product line. This role will also contribute to the visibility, advocacy, and domain expertise of the ISD and is responsible for ensuring the product line product managers fully determine and oversee delivery of the strategy and roadmap for their products to achieve ISD business outcomes and financial objectives.

Key Responsibilities

- Primarily:
  - Establish and drive product release plans that satisfy requirements and priorities.
  - Assemble a team to deliver the project product, potentially including both internal and contract resources.
  - Apply development methodologies to ensure teams have the right skills and composition to deliver quickly and respond to emerging requirements.
  - Act as a champion of using common components, removing cultural or process barriers to the usage of common components and functionalities.
  - Factor in required architecture or engineering effort to use or build common components.
  - Identify potential new product solutions that the market will embrace.
  - Make or help with buy-versus-build decisions.
  - Identify, anticipate, and tackle technical issues, and remove blockers.
  - Participate in the vendor selection process
- Shape product line product strategy to achieve intended impacts, problem solve stakeholder engagement, and identify opportunities for deeper learning.
- Identify and establish state, federal, policy, and community partnerships to ensure that the ISD best practices and learnings can be scaled effectively and leads to sector-wide adoption and systems change.
- Collaborate extensively with product and engineering teams to inform product priorities, plan joint roadmaps with partners, quickly test and implement user needs, and determine product line product viability.
- Test, iterate, and scale the ISD strategy for working with government such that outcomes for clients are improved and government partners realize administrative efficiencies.
- Develop metrics and dashboards and bring visibility to product line achievements such as pipeline development, progress toward policy goals, operational changes, etc.
- Drive execution, identity and mitigate risks, and communicate clearly with internal and external stakeholders.
- Create and encourage a culture of initiative, flexibility, and responsiveness, mobilizing the product line product teams to respond swiftly to changing priorities
- Drive a diverse and collaborative working culture which encourages openness, approachability and is supportive of challenge, however uncomfortable.
- Collaborate with engineering leads to develop and evolve team processes that enable us to focus on the right things and execute efficiently.
- Participate in research and interactions with users: understanding what we're trying to learn and why and ensuring the right outcomes from research

Product Owner Profile

Product owners serve as the voice of the customer within the product office teams to guide each development team in building software capabilities and features with the highest business value and customer impact. They represent business needs and priorities, prioritize, and manage the product team backlog, and incorporate feedback from business stakeholders to guide continuous product improvement.

Key Responsibilities

- Primarily:
  - Summarize the customer needs and goals in clear and concise themes, epics, and user stories.
  - Divide the overall project initiative / Program Increment goals into prioritized deliverables for sequential and focused progress.
  - Support Product Manager in product visioning, product discovery, and product roadmap.
  - Resolve ambiguous business priority conflicts.
  - Maintain the integrity and guide the evolution of themes, epics, and user stories.
  - Prioritize user stories for sequential and focused team progress, clarifying the definition of “done” for each user story.
  - Adjust project priorities according to evolving business and project conditions.
  - Include technical debt reduction in all priority considerations.
  - Collect and respond to customer and stakeholder feedback, appropriately adjusting future scope, timing, and priority of deliverables.
  - Adjust the scope, priority, and timing of deliverables in collaboration with the agile team, product line management and other stakeholders.
  - Validate that working software is done according to the adopted definition of “done.”
  - Ensure new code conforms to established coding standards, design specification and performance goals.
- Act as the voice of the customer to guide all stages of software development, including user epic and story development, sprint planning, and prioritization of the product and team backlog.
- Understand business and end-user needs; identify and prioritize features to be delivered to meet those needs.
- Work with business and technical stakeholders to develop and document capabilities, features and user stories.
- Participate in sprint / iteration planning to determine the team’s objectives for the upcoming sprint.
- Prioritize and maintain the team backlog.
- Participate in agile ceremonies such as stand-ups, story refinements, and team retrospectives; ensure the team has a clear understanding of priorities and next steps.
- Lead the sprint review meeting to present the output from the sprint to key stakeholders.
- Analyze feedback from sprint reviews, and other data such as end user feedback and operational metrics, to identify and understand product needs.
- Work with the development team to create acceptance criteria and definitions of failures and done.
- Assist the team on the development of feature tests, test cases, and regression tests.
- Set expectations with business stakeholders for delivery of new capabilities, features, and functionalities.

Scrum Master Profile

The scrum master facilitates and champions the agile software development process by coaching and mentoring development teams, identifying and eliminating impediments, and promoting the use of standards and best practices. The scrum master ensures smooth operation of agile processes and activities, and is responsible for leading daily stand-ups, backlog prioritization meetings, and retrospectives.

Key Responsibilities

- Primarily:
  - Coach Scrum and Kanban teams to make progress, learn and function at the highest level.
  - Remove impediments to progress.
  - Train others in Scrum and Kanban frameworks.
  - Act as a buffer between the team and any distracting influences.
  - Work with product owners to ensure the product backlog is well-groomed and ready for the next sprint.
  - Facilitate meetings
- Organize and facilitate agile activities and ceremonies including daily stand-up meetings, sprint reviews, retrospectives, sprint and release planning, and product backlog refinement sessions.
- Ensure that all meetings are positive, productive, stay on topic, and are kept within the timebox.
- Collaborate closely with the product owner to manage the backlog.
- Effectively manage user story estimation and forecasting.
- Champion and facilitate adoption of agile standards, tools, and best practices.
- Coach team on established IT and corporate standards (e.g., security, quality, and architecture) to minimize operational and reputational risk.
- Proactively identify and resolve impediments to team progress.
- Communicate with leaders across the organization to ensure transparency into delivery progress, challenges, and risks.
- Utilize team feedback and metrics (e.g., quality, delivery, cadence, etc.) to identify areas of opportunity and work with team to continuously improve.
- Coach the team to improve collaboration and self-management, promoting healthy interactions both within the team and with external stakeholders.
- Represent the team at broader planning and coordination sessions (e.g., Scrum of Scrums).
- Support the team in using agile planning and development tools (e.g., JIRA, Confluence, Rally).
- Experiment with new practices and frameworks to improve team outcomes.
- Actively participate in learning opportunities such as communities of practice or conferences to improve skills and better support the team.
- Contribute to the advancement and improvement of agile practices within the organization.

Software (Full Stack) Engineer Profile

Software engineers design, develop, test, and maintain high-quality software to meet business and customer needs. Depending on the role, software engineers work on development initiatives that include:

- Developing features and capabilities for end users, either external customers or internal employees.
- Developing platforms such as data engineering, developer tooling, or machine learning.
- Configuring and customizing vendor-provided packaged software.

Key Responsibilities

- Primarily:
  - Able to take a concept and turn it into a finished feature.
  - Combine business knowledge, functional, technical, and testing skill sets.
  - Demonstrate expertise in one or more of those skill sets and the interest to develop others.
  - Continually improve products with automation, risk mitigation and other practices.
  - Required in most areas, while some areas will have equivalent roles.
- Write high-quality code that satisfies customer needs and strives for simplicity, clarity, and testability.
- Promote a collaborative team environment and work closely with colleagues to achieve business objectives.
- Collaborate with stakeholders (e.g., business stakeholders, product owners, project managers, and end users) to understand functional and non-functional requirements.
- Investigate and propose solutions to development and design problems.
- Participate in scope of work estimation and forecasting.
- Adhere to architecture, design, implementation, and security standards and best practices.
- Participate in code reviews or use collaborative programming techniques to promote high quality business outcomes.
- Conduct analysis to determine integration needs, and design and plan integrations.
- Implement unit and integration tests and conduct functional and performance testing where appropriate.
- Develop reusable software building blocks to enable faster delivery.
- Improve performance of existing software by diagnosing and resolving critical issues.
- Prepare technical documentation, including software design evaluation plans, test results, and technical manuals.
- Adhere to established development practices and processes.
- [Where applicable:] Analyze and create new configuration for packaged software.
- [Where applicable:] Review new releases of packaged software and identify new features that can be enabled for the business.
- [For senior-level software engineers:] Coach and mentor junior software engineers.

DevSecOps Engineer Profile

DevSecOps (short for development, security, and operations) engineers streamline the software development lifecycle to improve developer productivity, delivery speed, and code quality. They work closely with development, operations, and security teams to identify and resolve pain points and inefficiencies in delivery workflows. Key responsibilities include automating delivery processes and maintaining the continuous integration and continuous deployment (CI/CD) pipeline and the integration of security at every phase of the software development lifecycle, from initial design through integration, testing, deployment, and software delivery.

Key Responsibilities

- Primarily:
  - Develop use standards, user self-service designs and reporting on application KPIs.
  - Create reusable automation libraries that can be applied throughout the enterprise.
  - Design, develop and deliver scalable and automated services architecture.
  - Wire software delivery pipelines for various enterprise customers and services.
  - Determine high availability/disaster recovery (HA/DR), security, capacity, and compliance strategies for existing and new applications.
  - Collaborate to define best practices and standards around DevOps and service resilience.
- Streamline the software development lifecycle by identifying pain points and productivity barriers and determining ways to resolve them.
- Collaborate closely with development teams to understand their current build and release processes and make recommendations for improvement.
- Partner with cross-functional stakeholders, including development, operations, quality assurance and security, to streamline processes.
- Provide guidance to development teams to improve performance and operability of the solutions they develop.
- Build and maintain the CI/CD pipelines to improve developer productivity, agility, and code quality.
- Develop and continuously improve automation solutions to enable teams to build and deploy code efficiently and consistently.
- Determine and support working strategies for high availability/disaster recovery, security, capacity, and compliance across existing and new applications.
- Build automated testing to reduce manual effort and improve product quality.
- Ensure that systems meet business and customer needs for reliability and availability.
- Monitor and manage application performance and service quality, including initial troubleshooting, identification of root cases and issue resolution.
- Work closely with cross-functional stakeholders to analyze and troubleshoot complex production issues.
- Prepare and present design and implementation documentation to multiple stakeholders.
- Promote DevSecOps principles and culture across the software engineering organization.
- [For senior-level DevSecOps engineers:] Mentor and coach junior-level DevSecOps engineers.

Client Experience Designer Profile

The Client Experience Designer will take a holistic view of client interactions. This designer will work with people across the enterprise to define the experience design process, apply the concepts and methodology, develop design deliverables, outline an experience improvement plan, and ultimately see the improvements through to completion. The designer should be familiar with the employment of quantitative and qualitative research methods to perform their analysis. The expectation is that the ideal candidate will drive design all the way through to delivery of the recommendations; in other words, bring the experience to life.

Key Responsibilities

- Primarily:
  - Uncover user needs through discovery, engagement, and testing.
  - Lead design initiatives focused on understanding user needs and translating these into product strategies and experiences.
  - Mix user, business and technology needs to understand and simplify complex systems.
  - Organize, plan, and visualize how users should interact with a digital product(s) through the creation of journey maps, personas, workflows, wireframes, prototypes, and mockups.
- Ensure client experiences are designed to be useful, easy, and enjoyable for the client
- Obtain an in-depth understanding of client wants and needs of their benefits interactions and the current pain points they experience; then find ways to improve those interactions
- Lead or contribute to high-impact projects that are designed to improve a client's experience across a full interaction with all programs and workers
- Create design deliverables, develop a plan, and lead delivery of the changes. Specific deliverables vary by project and may include journey maps, personas, workflows, wireframes, prototypes, and mockups.
- As part of creating and implementing simplified client experiences, engage other employees, partners, and clients in co-creating the experience from a client-centric point-of-view
- Effectively communicate concepts, design rationale and findings to the organization
- Partner with key business units and partners to improve key processes that define client touchpoints
- Understand current performance metrics as they relate to the overall client experience
- Help the enterprise integrate client-centric design methods into its work

Quality Assurance / Test Engineer Profile

The QA/test engineer tests and ensures that products are produced reliably, predictably, and delivered in a reliable, usable format. The engineer develops repeatable processes and the automation strategy for testing and generates scripts to perform automated testing.

Key Responsibilities

- Primarily:
  - Implement and evolve risk-based testing in IT-business product lines.
  - Provide automation capabilities via testing tools.
  - Develop quality assurance strategies for infrastructure products.
- Enforces risk-based product testing and documentation protocols, and ensures that those results are documented, be it systems-level testing, functional testing, environmental testing, and whatever else is required for a particular product or software release
- Writes and executes test plans, designs, and develops test tools, debugs, and reports code bugs, and pushes quality upstream.
- Ensures bug fixes / upgrade packages are delivered, and work when installed
- Validates data integrity at various levels
- Tests various paths of the workflow and validates the auditing and error handling features of the products
- Provides corrective actions for product and process shortcomings that emerge
- Documents the ISD quality processes and strategies for infrastructure components.
- Defines processes and standards for implementing test automation, provides detailed documentation and training on automation tools and applications and develops automation framework and tools to aid testing, operations, and maintenance of the product environment
- Measures performance of various components (using simulated stress tests whenever needed) and reports any outliers/exceptions

ISD Solution Architect Profile

The solution architect proactively and holistically leads and supports EA activities that guide the development and management of the portfolio of ISD solutions. Solutions include projects, products, systems (including applications, technologies, processes, and information), shared infrastructure services and shared application services.

He or she has a deep understanding of business goals, objective and business outcomes, business capabilities, value-streams, and business processes. The solution architect provides the necessary leadership, analysis and design tasks related to support the development of technology solutions to ensure that solutions meet business needs and align with architectural governance and standards. He or she creates deliverables for managing the organization's portfolio of "to be" and "as is" solutions — including systems (applications, processes, and information), shared infrastructure services, and shared application services and components to enable and drive targeted business outcomes.

Key Responsibilities

- Primarily:
  - Develop the solution architecture vision and approach that can effectively deliver the product and the overall solution and promote the appropriate design and development practices with the various stakeholders and constituents, including other solution architects.
  - Own the technical decisions of the Product and of the broader solution domains but invite input through a collaborative and team-based approach, seeking consensus from ISD Product Management and Enterprise Architecture leadership team.
  - Stay abreast with technology trends, organizational decisions, standards, and solution designs of other domains to provide effective decision making.
  - Conduct technical evaluations of the third-party vendor applications and participate in the vendor selection process.
  - Perform a comprehensive security review of the vendor's application or platform.
  - Design or develop proof-of-concept solutions to validate a technical approach or a technology.
  - Validate the business briefs during discovery and/or planning phases of an initiative or Program Increment.
  - Assess architecture risks, product fit into the overall landscape and strategy, as well as size level of effort to ensure informed decision making.
  - Understand existing enterprise assets, such as frameworks, patterns, and subsystems, and ensuring that the teams use them where appropriate.
  - Publish, socialize, and evangelize the assets/subsystems developed as part of his/her own initiatives with the broader architecture community.
- Understands business drivers and business capabilities (future and current state) and determines corresponding enterprise system designs and change requirements to drive the ISD business outcomes.
- Understands emerging technology trends and disruptions and the practical application of existing, new, and emerging technologies to enable new and evolving business and operating models.
- Translates business and technical requirements into an architectural Blueprint to achieve business objectives and documents all solution architecture design and analysis work.
- Provides deliverables like standard definitions, reference models and architecture designs to help the Enterprise Chief Architect and the EAB assess the impact of new and ongoing technology investment on the business and IT estate.
- Leads evaluation, design, and analysis for the implementation of a solutions architecture across a group of specific business applications or technologies based on enterprise business strategy, business capabilities, value-streams, business requirements and enterprise standards and creates architecture designs.

Key Responsibilities

- Manages and develops the architecture for a broader scope of projects or products, working closely with application architects that manage and design architecture for a single project or product or initiative.
- Facilitates the evaluation and selection (sometimes creating proof-of-concept approaches) of software product standards and services, as well as the design of standard and custom software configurations.
- Supports product managers in end of life (EOL) product decisions to maintain, refresh or retire products, services, or systems (including applications, technologies, processes, and information).
- Develops a roadmap for the evolution of the enterprise application portfolio from future to current state (as defined by the solutions architecture).
- Monitors the current-state solution portfolio to identify deficiencies through aging of the technologies used by the application, or misalignment with business requirements.
- Works closely with the product owners and product managers to ensure a robust architectural runway that can support future business requirements throughout the product lifecycle.

Provides consulting support to application architects within agile teams to ensure the project or product is aligned with the overall enterprise architecture.

Vendor Manager Profile

The Vendor Manager is responsible for all technology and IT vendors for the Integrated Service Delivery (ISD) Product Office. He or she will be the primary resource responsible for a combination of IT vendor contracts, performance, relationship, and risk management. He or she owns and must understand contractual, commercial, and operational working relationships with vendors to ensure effective delivery of committed products, services, and solutions. This role is a senior leadership position, reporting directly to the Product Director. The role will collaborate with State and DHS procurement around policy and processes associated with the vendor management functions and includes collaboration with Program Area leadership and stakeholders who may be responsible for adherence to, or execution of, procurement policy and process

Key Responsibilities

Operational:

- Establish and promote internal and external policies, standards, and processes for vendor interaction.
- Manage the maintenance/enhancement of tools for use in vendor management, including vendor tracking, analytics, and performance management tools.
- Serve as the leadership-level point of contact between the vendors and internal customers consuming vendor services and solutions.
- Manage the collection, consolidation, and communication of reporting and data on vendor contracts, performance, risk, and relationships to key stakeholders and vendors.
- Coordinate with asset management team and resources to assist in the management and tracking of software/hardware assets and consumption of cloud-based entitlements.

Contract management:

- Oversee maintenance of vendor agreements in cooperation with procurement, legal, and key stakeholders to ensure that they are current/up-to-date and compliant with relevant laws and regulations.
- Manage/oversee the maintenance of a repository of vendors in a contract management database to track key engagement milestones (expirations, renewals).
- Segment and rationalize the vendor portfolio so that appropriate focus can be applied to the most strategically important vendor relationships/engagements.
- Maintain an inventory of vendor spend in collaboration with DHS procurement by category (software, hardware, telecom, staff augmentation, services), cost center, and region.

Relationship management:

- Manage vendor relationships as the key point of contact between specified vendors and the business.
- Serve as a point of escalation for vendor issues and disputes and drive those issues to resolution.
- Manage the communication process with vendors, including what information should be communicated, when and by whom, to ensure that appropriate leverage is preserved.

Performance management:

- Oversee the measurement and reporting of vendor performance, including the development of evaluation tools based on stakeholder needs, and the creation of scorecards and dashboards that will accurately present this data.
- Ensure that the metrics used to evaluate performance are properly tied to business outcomes and bias-free, and that the associated communications around these metrics are clear.
- Manage delivery of performance feedback to vendor organizations and oversee action plans and corrective measures which may arise from the performance management process.

Risk management:

- Maintain vendor risk assessments or risk registers in cooperation with risk, privacy, business continuity, and security teams.

Vendor Manager Profile

- Develop or participate in the development of risk frameworks accounting for sensitivity to and tolerance for identified vendor risk types (financial, regulatory, operational, reputational, etc.).
- Partner with other areas of the business (procurement, finance) to track and report on vendor financial viability, business continuity, and corporate and regulatory compliance.

Provide oversight to vendor audits where required; arrange and direct departmental activities and true-up/reconciliation schedules.

Stakeholder Governance Manager Profile

The stakeholder governance manager provides direction and guidance to the governance participants and stakeholders at the state, county, and tribal nation level to enable the development and timely deployment of the best information technology (IT) solutions that meet the business and customer needs and priorities. The position helps bridges the gap between business partners and technology solution providers and ensure a robust, consistent, and transparent decision-making process is enabled.

Key Responsibilities

- Builds and maintains strong relationships with business partners including DHS programs, counties, and Tribal Nations
- Manages and leads the administration and reporting of the ISD stakeholder engagement and governance processes
- Leads and supports the development of business cases requiring IT-based solutions
- Helps and acts as an advisor to business partners to shape their strategy regarding information and technology and ensure they are aware of IT service offerings and options
- Promotes business projects and communicates value to the business and IT leaders and community
- Communicates business needs and priorities and helps define and communicate new services to support business needs
- Ensure the governance process is fully engaged with the design and development of new and changing business and IT capabilities in a timely manner
- Supports all aspects of governance as it defines, prioritizes, and manages program and product initiatives
- Tracks OKRs and ROI for business initiatives including cost, benefits, and risk and assists in the development of metrics used to track value delivery
- Provides details on cost, value, and opportunity to optimize IT spend (initiatives and support services)
- Assists in definition and refinement of SLAs based on business need
- Maintains up-to-date awareness of industry and technology trends, and works with Enterprise and Solution Architects to make recommendations for implementation of new/upgraded systems and technologies
- Maintains knowledge of multiple business functions, capabilities, and initiatives to identify where conflicts / synergies exist between business functions for leverage of information technology and capabilities

Business Analyst / Subject Matter Expert

Business analysts provide a strong understanding the functional domain / program area and identify, define, and document business processes and software requirements to be developed as software. They serve as a liaison between business, product owner, system analysts and software engineers by facilitating communication and determining software objectives that align with stated and unstated business needs.

Key Responsibilities

- Obtain a deep understanding of relevant business area(s) to be able to recommend solutions and build high-quality requirements.
- Use a variety of techniques to understand business requirements, such as interviews, workshops, surveys, site visits, and storyboards.
- Shape business requirements by making recommendations and suggesting alternatives to proposed solutions.
- Understand technical options, limitations, costs, and risks. Communicate trade-offs to business partners and work with them to shape requirements accordingly.
- Translate conceptual user requirements into clear, detailed functional requirements.
- Work with business and delivery teams to prioritize requirements.
- Help resolve competing priorities between stakeholder groups by facilitating stakeholder discussions and escalate issues where appropriate.
- Manage requirements scoping throughout the delivery process.
- Create artifacts as appropriate, including business case documentation, scope documentation, and process flows.
- Support delivery teams as they develop, test, and deploy solutions.
- Review delivery team output to ensure requirements are correctly interpreted; define and execute test cases.
- Document current processes and models to understand inefficiencies or gaps.
- Identify and assist in prioritizing opportunities to streamline business processes.
- [For senior-level business analysts:] Promote a collaborative team environment and provide mentorship to junior-level analysts.

System Analyst

The system analyst serves as a primary contact for any questions related to how the system works from both a business and technical perspective. The system analyst partners with business analysts to translate business requirements into technical specifications and partners with software developers and QA analysts to develop logical technical processes. The system analyst also performs basic cost-benefit calculations, interdependency analysis, and prioritization exercises related to systems changes.

Key Responsibilities

- Partners with business analysts and technical teams to understand and define system goals and business requirements.
- Partners with business analysts to translate business requirements to technical system requirements.
- Creates technical specifications and processes using structured analysis and data modeling techniques (e.g., activity diagrams, entity-relationship diagrams).
- Partners with designers to build system functionality and quality attributes.
- Assists technical groups in revising logic for performance efficiency.
- Builds and leverages automation to decrease overall system deployment and support cycle time
- Participates in system and user acceptance testing efforts.
- Builds standards, processes and procedures, and guidelines for business analysts and software developers.
- Assists business analysts to evaluate cost-benefit and ROI analyses.
- Understands system interdependencies and collaborates with project teams accordingly.

Product Designer Profile

The product designer leads the design of ISD products and services and will work with people across the enterprise to define the product design process, apply the concepts and methodology, develop design deliverables, outline an experience improvement plan, and ultimately see the improvements through to completion. The designer should be familiar with the employment of quantitative and qualitative research methods to perform their analysis and will drive design all the way through to delivery of the recommendations.

Key Responsibilities

- Design high quality digital products and services.
- Collaborate with engineers and product managers on implementation.
- Find new ways to solve large and complex problems related to the integration and delivery of health and human services.
- Prototype in short, iterative feedback cycles, and refine concepts through to final design solutions.
- Set creative and strategic design direction for a team.
- Develop presentations and documentation that communicate strategy, progress, and solutions for external stakeholders as well as the rest of the team.
- Contribute to the community of design across the organization: sharing experience, expertise, and best practices.

Grants and Budget Manager Profile

The Budget and Grants Manager will manage multiple contracts from a variety of sponsoring agencies including but not limited to Federal Financial Participation (FFP). This position would comply with required quarterly, monthly, and biannual grant submissions. The Manager will need to possess strong communications skills to work with all budget makers to build their budgets and understand their impact on and align with organizational, financial, and program goals. Their ability to prepare fiscal year forecasts, based on budget to actual variances will enable management to make short- and long-term financial decisions.

Key Responsibilities

- Development of ISD Product Office Organizational Budgets and Forecasts — Work with the Solution Director and Finance staff to prepare annual budget, provide technical support, and prepare documents necessary to provide budgetary perspective.
- Build communication structure within the Product Office to provide monthly and quarterly forecasts or as needed.
- Development of budgets required to support all Product Management and Development work and Advance Planning Documents required to support obtaining Federal Financial Participation.
- Operational and Compliance Reporting for the management of all Product Management funding.
- Prepare and review monthly budget variance reports
- Build relationships with administrative and program staff to ensure the funding process is effective, accurate, and timely. Training and educational efforts are necessary to ensure transactional integrity of revenue and expenses.

Organizational Change and Communications Manager Profile

The organizational change and communications manager is a multifaceted role that interfaces with various stakeholders across the ISD enterprise. Incumbents are responsible for embedding organizational change management (OCM) practices into the organization's operations to achieve the desired business outcomes.

This role is responsible for leading, directing, coordinating, and providing visibility into the organization's change management efforts for ISD. The role creates change management strategies and develops change workstreams that maximize employees' change readiness and adoption of those strategies. The organizational change and communications manager role is focused on the activities required to help individual stakeholders understand, adjust to, and adopt the new practice, item, process, or tool that ISD products are implementing.

Key Responsibilities

- Promotes the business ISD vision with a benefit framework that links adoption of change to successful business outcomes.
- Employs a structured change management methodology to facilitate change and promote commitment to adapt to the change. Knows how to tailor this methodology to be culturally appropriate for the enterprise and program.
- Prepares for change by assessing the magnitude of change and the organization's change readiness.
- Identifies pitfalls and potential points of challenge or change aversion. Develops counterstrategies to mitigate or minimize potential issues.
- Conducts thorough methodological investigations to identify key stakeholders impacted by the change. Determines appropriate timing of that change. Conducts an environment scan to identify potential challenges for stakeholders, such as skills gaps, doubts, and uncertainties, to foster a positive acceptance of change. Tailors change management plans (training and orientation) to accommodate the needs of the different stakeholder groups impacted.
- Creates a communications strategy and plan to ensure all employees are fully aware of impending changes.
- Works with HR to create mechanisms to de-emphasize old behaviors and encourage new desired ones. This process may involve redesigning jobs and defining new behavioral competencies and performance metrics.
- Conducts an impact assessment for stakeholders affected by the change items. Regularly reviews the stakeholder community to assess potential change fatigue.
- Identifies and provides leadership for change agents and change advocates within the stakeholder community by involving trusted informal leaders to create employee understanding and influence successful organizational change.
- Promotes and provides ongoing coaching and mentoring about change management practices to senior leadership, stakeholder managers and project managers to increase their effectiveness in driving sustainable change.
- Performs quantitative assessment of change success and change adoption. Solicits feedback from stakeholders to determine the success of change management activities and ensure that behavioral changes align with strategic objectives.
- Educates executives and the organization about OCM.

Agile Coach Profile

The agile coach serves as an evangelist and accelerator for adoption of agile ways of working within the ISD product office and teams. They will provide training and coaching to build teams' maturity in agile approaches, measure progress to overcome obstacles and drive continuous improvement, and champion agile to stakeholders.

Key Responsibilities

- Develop, deliver, and/or coordinate with external providers to provision training and workshops on agile frameworks (e.g., Scrum, Kanban, Scaled Agile Framework) and practices (e.g., conducting daily stand-ups, retrospectives, backlog management).
- Assess and enhance team agility and maturity by developing coaching plans and conducting maturity assessments.
- Coach individuals and teams (including scrum masters and product owners) to facilitate adoption and improvement in agile methodologies and principles.
- Establish and ensure adoption of standards, ceremonies, and best practices for agile ways of working.
- Provide guidance and facilitate sprint and release planning sessions, and other agile ceremonies as needed.
- Challenge existing workflows and processes and remove impediments to agile teams' success.
- Facilitate the organization's transition to a continuous delivery model and adoption of an agile mindset across stakeholders.
- Monitor and communicate progress of agile teams' key metrics (e.g., key performance indicators) via the Product Office to ISD stakeholders.
- Track metrics to surface potential problems and assist teams in resolving them.
- Champion agile approaches, drive awareness of the agile transformation, and gain stakeholder buy-in to expand adoption and support agile approaches.
- Keep up to date with corporate policies, practices, and industry trends concerning agile.
- Participate in the identification, collection, and reporting of agile practice metrics and measurements to track progress.
- Assist with establishing communities of practice and developing a culture of continuous improvement across teams.
- Maintain an involvement in industry agile communities to continuously bring new methods and ideas to the organization.
- Participate with senior leadership to define outcomes and a roadmap for the organization's agile transformation.

Lead Software Engineer Profile

The lead software engineer is a senior-level role responsible for overseeing teams of software engineers, and providing leadership, vision, and direction for the software engineering organization. This position is responsible for recruiting, developing, and retaining talent, as well as ensuring the software engineering staff has the skills and capabilities to meet business needs. The lead software engineer also oversees the implementation of software engineering initiatives and is responsible for championing best practices and ensuring initiatives achieve business outcomes.

Key Responsibilities

Leadership and Strategy Responsibilities

- Lead the software engineering teams to successful delivery of business outcomes.
- Manage the software engineering team budget, with ongoing focus on personnel, vendor, and capital expenditures.
- Build strong working relationships with business leaders to ensure software engineering teams meet expectations and contribute to achievement of business goals.
- Collaborate with Product Management, IT, and business leaders to develop short- and long-term product plans and strategic roadmaps.
- Support and facilitate innovative and experimental software development work to test new ideas, within bounded cost and time frames.
- Provide leadership, vision, and direction for the software engineering team.
- Work with product management leadership to design, manage, and/or execute product roadmaps.

Talent Management Responsibilities

- Develop workforce strategy to meet the team's current and future software engineering needs through developing, hiring, and/or sourcing talent.
- Participate in resource allocation across teams to maximize business impact of resources and ensure each team has the skills and capabilities needed to achieve its objectives.
- Manage software engineering talent, playing a key role in performance management and compensation processes, role and competency definition, and diversity, equity, and inclusion initiatives.
- Partner with Human Resources to create learning and development opportunities aligned to the organization's skill and capability needs, and to provide rewarding career paths for software engineering staff.
- Recruit and hire talent to address new needs and skill gaps.
- Facilitate collaboration and partnership across software engineering teams and stakeholders.
- Build a culture that supports learning, collaboration, transparency, and inclusiveness.
- Manage employee engagement and promote a compelling employee value proposition to retain software engineering staff.

Oversight Responsibilities for Software Engineering Activities

- Champion best practices and modern software development methods and tools.
- Lead software engineering team and other stakeholders to set goals for improving code quality, maintainability, security, and scalability. Monitor progress against these goals.
- Implement and manage software development status reporting, metrics, and benchmarks.
- Manage collaboration with Infrastructure and Operations to ensure software performs well in production and meets SLAs.
- Work with the Chief Information Security Officer and designees to ensure software is effectively secured and that risks are mitigated.
- Oversee management of relationships with consultants, vendors, and contractors and support negotiation of statements of work and business terms with suppliers.
- In collaboration with Infrastructure and Operations leaders, oversee DevOps processes and practices, including automating the handoff of code releases from development to operations.

ISD Enterprise Architect Profile

The enterprise architect (EA) plays an integral role in building a holistic view and roadmap of the technology strategy, processes, and information technology roadmap. The ISD enterprise architect must partner with both business and technology groups to ensure that the proposed technical solutions not only align with the company's overall objectives, but also ensures that both groups enable and drive each other to meet the needs of the company's mission and vision.

Key Responsibilities

- Builds the long-term strategic roadmap for all related IT systems architecture
- Aligns IT strategy and planning with the company's business goals and objectives
- Seamlessly integrates business and service strategy into enterprise architecture roadmap
- Partners with business and technology subject-matter experts to elicit and translate business requirements into technological solutions
- Leads the design and modeling of tactical architectures for delivery, development, and support of projects
- Partners with other solution architects to provide a consensus based scalable and adaptable architectural solution
- Develops and maintains policies, standards, and guidelines to ensure that a consistent framework is applied across the enterprise
- Promotes the use of a shared infrastructure and application roadmap to reduce costs and improve how information flows
- Manages and facilitates a review board to evaluate project proposals for architectural fit
- Circulates roadmaps to align IT priorities with business partner needs

Integration Engineer Profile

The integration engineer develops a strategy and partners with delivery teams to design, develop and maintain efficient and high-quality integrations connecting data, applications and third parties that support business processes and customer needs. The integration engineer also monitors and analyzes existing integrations to improve their performance and efficiency.

Key Responsibilities

- Gather and analyze business, partner, and client requirements to identify and prioritize opportunities to improve efficiencies and processes through integration.
- Design and implement integration flows and enhancements, including APIs and/or file-based integrations.
- Partner with development and design teams to support and provide oversight in designing and developing integration solutions and prototypes.
- Determine, conduct, and automate integration tests, load tests, and performance tests, including facilitating set-up of test data and accounts.
- Prepare and manage technical documentation and self-service resources on integrations.
- Proactively monitor integration performance and troubleshoot, resolve, and report integration issues to impacted teams and stakeholders.
- Adhere to established development and integration processes, best practices, and standards.
- Use user and stakeholder feedback to guide the development of new products and integration enhancements.
- Participate in integration vendor and tool selection to meet business needs and support development team workflows.
- Promote a collaborative team environment and work closely with colleagues and stakeholders to achieve goals.
- [For senior-level integration engineers]: Provide coaching and mentorship to junior integration engineers.
- [For senior-level integration engineers]: Provide direction and leadership for a team(s) of integration engineers.

Attachment E — ISD Product Office Staffing Model Estimates

Product Office Staffing Model — Management and Administration

Position	Hours of Effort (Year 1)	FTE / PY (Year 1)	Cost Estimate
Product Director	2,000	1	$140 - $180K
Product Line Manager	1,000	0.5	$45 - $65K
Product Manager	2,000	1	$75 - $120K
Product Designer	2,000	1	$90 - $140K
*Agile Coach	2,000	1	$180 - $220K
^Enterprise Architect	2,000	1	$140 - $180K
^Solution Architect	2,000	1	$120 - $160K
Grants and Budget Manager	2,000	1	$80 - $120K
Stakeholder Governance Manager	2,000	1	$80 - $120K
Organizational Change and Communications Manager	2,000	1	$75 - $115K
ISD Go Forward Roadmap Team Leaders (12 Workstreams)	11,000	5.50	$450 - $650K
Total	**30,000**	**15**	**$1.48 - $2.07M**

- ***Candidate for use of external vendor expert resources.**
- **^The ISD Enterprise and Solution Architect report into the MNIT Office of Enterprise Architecture.**
- **Note: Cost estimates are based on average compensation ranges observed in the industry for the role.**

Product Office Staffing Model — Product Teams

Position	Hours of Effort (Year 1)	FTE / PY (Year 1)	Cost Estimate
Product Owner	2,000	1	$70 - $100K
Scrum Master	2,000	1	$80 - $110K
Business Analyst	2,000	1	$65 - $110K
Software Engineer / Lead Software Engineer	6,000	3	$340 - $460K
Client Experience Designer	2,000	1	$120 - $150K
Integration Engineer	500	0.25	$30 - $50K
Quality Assurance / Test Engineer	2,000	1	$75 - $110K
DevSecOps Engineer	500	0.25	$30 - $45K
Total	**17,000**	**8.50**	**$810 - $1,135K**
Total (Assuming 3 Product Teams at PO Launch)	**51,000**	**25.5**	**$2.43 – $3.41M**

Notes:
1. **Product Team's size will be between 5-12 FTEs based on software development increment's Story Point size estimate. An average size of 8.5 FTEs has been estimated here.**
2. **Number of Teams depends on overall scope of Product Development or modernization efforts. Three (3) Teams expected at PO launch.**
3. **Cost estimates are based on average compensation ranges observed in the industry for the role.**

Product Office Staffing Model (ISD Go Forward Roadmap Resources — 12 Workstreams)

ISD Go Forward Roadmap Workstreams		**PO / Team Hours of Effort (Year 1)	**PO / Teams PYs (Year 1)
D.	Develop Vision for Integrated Service Delivery	500 / 3500	0.25 / 1.75
E.	Define and Understand County and Tribal Nation Capacity to Support Integrated Service Delivery	100 / 500	0.05 / 0.2
H.	Define and Understand Client and User Needs	100 / 2900	0.05 / 1.45
I.	Define Business Capabilities Required for Integrated Service Delivery	100 / 2900	0.05 / 0.1
J.	Conduct Internal Market Scan of County and Tribal Technical Capabilities	500 / 500	0.25 / 0.25
K.	Develop Integrated Service Delivery Solution Architecture	100 / 2400	0.05 / 1.2
L.	Define Sourcing and Procurement Approach	400 / 600	0.2 / 0.3
M.	Enhance the Budgeting Process	100	0.05
N.	Define and Establish Multi-Vendor Services Integration and Management (MSIM) Role	100 / 700	0.05 / 0.35
O.	Procure the Solution	2000 / 6400	1 / 3.2
P.	Conduct Readiness Planning and Change Management for Implementation	5000	2.5
R.	Stabilize Legacy Systems	2000 / 80,000	1 / 39.33
Total		***11,000 / 105,500**	***5.50 / 50.68**

***Accounted for in ISD Product Office Management and Admin Staffing on page 25**
****Effort of PO leadership staff shown alongside effort from elsewhere in DHS (e.g., 500 / 3,500)**