WCB Modernization



2024-2028



Once upon a time...

today.



Two Major Areas of Approval:

Legislative Approval for Budget: 25-27 Session Approved for \$650,000 start up costs.

DAS EIS Approval for Purchase and Implementation: Assigned Oversight Level 3.



Project Portfolio Performance (P3)

Required Artifacts Form - Oversight Level 3

Agency Worker's Compensation Board

Project Name Litigation Case Management System

As a matter of formal project management best practices, it is expected that agencies will develop most or all of the following artifacts for a project under Level 3 oversight. Items denoted with a "X" must be provided for EIS P3 review and approval to demonstrate readiness for obtaining endorsement to proceed to the next stage.

EIS may request additional documents be reviewed or substituted at any time during the project lifecycle. Agile specific or equivalent artifacts are designated as such and listed in blue font. See the Project Oversight Guide for more detail on project artifacts.

Items with an asterisk (*) denote that draft versions should be provided via email for review and approval. Final versions should be uploaded to PPM. Additionally, artifacts listed under prior stages must be provided again if changes are made or required.

	Stage 1. Artifacts	Notes
Х	IT Investment Form	
Χ	Business Case	
Χ	Project Charter	
X	Initial Complexity Assessment	
	Procurement Documents/Contractor Statements of Work1 *	Provide if contracting for PM, BA or planning services
	(Agile) Project Agile Readiness Evaluation	

Stage 2. Artifacts	Notes
Project Status Reports	Monthly
Detailed Project Risk, Issue and Decision Logs	Monthly
Procurement Documents/Contractor Statements of Work! *	Provide if contracting for PM, BA, planning services of Independent Quality Management Services (IQMS)
IQMS final deliverables *	Provide if engaged with IQMS at this stage
Market Research	Provide if not included in business case
Solution Analysis	Provide if not included in business case
Current, Future, & Gap Analysis (Agile) User Research & Business Process Maps	Provide if not included in business case
Project Management Plan	High level approach and framework
Organizational Change Management Plan	
Stakeholder Registry	
RACI (Agile) Roles & Team Agreements	
Budget (± 50%)	
Schedule (± 50%) (Agile) Roadmap, Release Plan & Milestones	
Scope (± 50%) (Agile) Project Backlog	
Requirements	
System Security Plan	Engage with CSS Business Security Advisor
Cloud Workbook	Engage with CSS Business Security Advisor
(Agile) Project Agile Readiness Evaluation	Provide if not completed earlier

¹ Agencies should work with their procurement office to submit copies of Feasibility Determination, Cost Analysis and Department Report (see ORS 279B.033 and Oregon State Procurement Rule 125-247-0110)



Project Portfolio Performance (P3)

	Stage 1. Initiation Stage 2. Resource/ Solution Analysis Planning		
Ø	Stage 3. Artifacts	Notes	
Χ	Project Status Reports	Monthly	
Χ	Detailed Project Risk, Issue and Decision Logs	Monthly	
X.	IQMS final deliverables *	Provide if engaged with IQMS at this stage	
X	Procurement Documents/Contractor Statements of Work ¹ *	Provide if contracting for project management, business analysis, solution vendor, or IQMS	
X	Baseline Project Management Plan		
Χ	Benefits Management Plan		
Χ	Baseline Budget (± 10%)		
X	Baseline Schedule (± 10%) (Agile) Roadmap, Release Plan & Milestones		
Χ	Baseline Scope (± 10%) (Agile) Project Backlog		
X	Requirements Traceability Matrix (Agile) Project Backlog		
10	LFO Readiness Assessment	Engage with LFO	
	Cloud Workbook	Engage with CSS Business Security Advisor	

-	Stage 1. Initiation Stage 2. Resource/ Stage Planni	3. Implementation Stage 4. Execution
	Stage 4. Artifacts	Notes
Χ	Project Status Reports	Monthly
X	Detailed Project Risk, Issue and Decision Logs	Monthly
	Project Major IT Quarterly Reports	Engage with Statewide Quality Assurance
Χ	IQMS final deliverables *	Provide if engaged with IQMS
Χ	Executed Contracts & Amendments1 *	
Χ	Updated Project Management Plan	
X	Test Plan	Provide for review and approval prior to executing plan
Х	Baseline Budget (± 10%)	
Х	Baseline Schedule (* 10%) (Agile) Roadmap, Release Plan & Milestones	
Χ	Baseline Scope (± 10%) (Agile) Project Backlog	
	(Agile) Initial Delivery Release Plan	Before initial delivery
	(Agile) Initial Delivery Completion Report	After initial delivery
	(Agile) Sprint Completion Report	End of each sprint
Χ	Operations and Maintenance Plan	Provide for review and approval prior to initial delivery or go-live
81	System Security Plan	Engage with CSS Business Security Advisor
	Cloud Workbook	Engage with CSS Business Security Advisor
Х	Data Dictionary	Provide for review and approval prior to initial delivery or go-live
X	Disaster Recovery Plan	By project completion
X	Requirements Traceability Matrix	Provide for review and approval prior to initial delivery or go-live
X	Benefits Realization Report	By project completion
X	Lessons Learned/Project Close Out Reports	By project completion



[Agency Acronym] | [Project Name] Issued by: [First Name Last Name, Senior Oversight Analyst] - [month YYYY]

Page 1

Stage 3. Implementation Stage 4. Execution

Move to Operations

859

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MEMORANDUM

To: Terrence Woods, State Chief Information Officer (State CIO)

From: Katy Combest, Oversight Analyst

Date: April 10, 2025

Subject: Workers' Compensation Board (WCB) Litigation Case Management System

(LCMS) Level 3 Stage Gate 1 Conditional Approval

BACKGROUND

The Workers' Compensation Board (WCB) is an independent adjudicatory agency within the Department of Consumer and Business Services (DCBS), whose mission is to resolve disputes resulting from Oregon Workers' Compensation Law and the under the Oregon Safe Employment Act. To meet this intended mission, WCB has relied upon paper-based processes and a system that is unable to meet the agency's basic business needs. WCB has partnered with DCBS, IT and Research (IT&R), to develop and modify the existing WCB system as needed. Unfortunately, the mix of paper and automation and the architecture the legacy system cannot meet the changing needs of the business, nor the needs of Oregonians.

WCB is seeking to purchase a litigation case management system (LCMS) that is specifically designed to streamline and optimize the complexities of legal disputes. Purchasing a software as a service (SaaS) litigation case management system will enable WCB to more effectively provide services to the Oregonians who require our forum.

DISCUSSION

Passed Stage Gate 1:

April 10, 2025

	Detailed Project Risk, Issue and Decision Logs
	Procurement Documents/Contractor Statements of Work ¹ *
	IQMS final deliverables *
Current	Market Research
	Solution Analysis
Tasks	Current, Future, & Gap Analysis (Agile) User Research & Business Process Maps
Idono	Project Management Plan
Х	Organizati <mark>onal Change M</mark> anagement P <mark>lan</mark>
Х	Stakeholder Registry Stakeholder Registry
Х	RACI (Agi <mark>le) Roles & Tea</mark> m Agreements
Х	Budget (± 50%)
	Schedule (± 50%) (Agile) Roadmap, Release Plan & Milestones
	Scope (± 50%) (Agile) Project Backlog
	Requirements
	System Security Plan
	Cloud Workbook
	(Agile) Project Agile Readiness Evaluation

Workers' Compensation Board: Litigation Case Management System (LCMS) Project Structure

EIS (P3, Cyber
Security Services,
Statewide Quality
Assurance Program,
Office of the State
CIO)
IQMS
Legislative Fiscal
Office
DAS Chief
Financial Office
Oregon
Legislators

Executive Sponsor

WCB Steering Committee

IT Project Manager

Other

DCBS Directors Office

DCBS Central Services Division WCB Project Resources

DCBS IT&R Resources

WCB / DCBS Resources

WCB Organizational
Change Management
Analyst
WCB Statutes and Rules
Advisory Committee

Contracted Resources

IT Vendor Resources

Legislative / Budget

DCBS Legislative Coordinator

DCBS Financial Services

Procurement / Contracts

DCBS Procurement

DAS Procurement

DOJ

Inform / Outreach

External Stakeholders

Internal Stakeholders



Change Management Plan Components

The following activities inform and support the implementation of the change management plan for external stakeholders.

Identify and Assess Stakeholders

Conduct Change Impact Analysis Design Readiness
Assessment

Design Engagement & Communication

Finalize Change Management Plan

- Identify key stakeholders and relationships
- Assess the level of influence of key stakeholders
- Analyze assessment results to inform the stakeholder engagement strategy
- Identify roles and responsibilities for key stakeholders

Stakeholder Map

- Capture current state and identify future state processes
- Score and analyze level of impact (to people, process and technology) for stakeholders based on variances between current and future state
- Finalize change impact matrix across capability dimension and level of impact
- Change Impact Tracker

- Identify questions in alignment with ADKAR and key areas of project and change management
- Draft a timeline for assessment deployment
- Outline supporting communications for initial assessment

 Change Readiness Assessment

- Assess and map existing communications to ADKAR
- Develop a communications plan that outlines stakeholder, activities, key messages, channels, and timelines
- Develop a stakeholder engagement plan to identify activities throughout project
- Develop a communications matrix to track all activities and communications
- Communications Plan
- Stakeholder Engagement Plan

- Create a comprehensive plan for implementation to capture all research, data and information collected through workshops, surveys and client engagement
- Launch change
 management activities,
 tactics, engagement and
 communications to inform
 and provide support and
 guidance to stakeholders as
 they prepare for and adopt
 the new system
- Change Management Plan
- Resistance Plan
- Sustainment Plan

Approval Phase 7 months

Drafting RFP Phase 7-8 months

RFP Posting Phase 1.5 months

Evaluation Phase 2 - 3 months

Contract Negotiation Phase 4 - 5 months

Contract Approval Phase 1 month

Implementation Phase 1 months

The End