From: Cummings Bob
To: LAWSON CAROLYN
Subject: RE: Materials for this afternoon"s meeting
Date: Thursday, September 27, 2012 9:34:56 AM

I appreciate the docs. A couple of thoughts and concerns:

1. **The Maximus issue tracking doc** covers the QA's concerns and issues, but not necessarily the LFO's. There is overlap, but they are not always exactly the same. I see no tracking doc for the LFO's concerns (however, they could be rolled into the Maximus issue tracking doc to avoid having to have two trackers).

2. The **milestone schedule** is helping, but awfully general (i.e. Mar/Apr Dev complete, sept/oct dev complete, etc.). If this high-level milestone chart was based upon a clear roadmap from problem to solution, a detailed scope statement, a detailed project schedule (which it rolls-up from), then it would be a useful tool to help track/verify progress. However, when it isn't clear to the LFO or Maximus what the overall SDLC is that is based upon, when the full roadmap is not clear, then it loses much value for independent oversight to verify actual progress. While the foundation upon which this high-level milestone schedule is based upon may be clear to HIX IT management staff, it is not clear (and probably not fully documented) to the LFO, Maximus, etc. It's not a bad chart, but it's not enough by itself to satisfy me as a tool to track progress.

3. The **solution factory** does show that you are building software. However, separate from the **context** of the business system design, a clear picture of final exchange business-IT system (what will it look like, what will it do, how will it operate, etc.), all we really see is that software for a number of the lines of business are being built. How solid the requirements are upon which this software is based, how well the business that the software will operate is defined (and being built by the corp), etc. simply is not known by the viewer. When I look at the demos (which may not be the same as the actual working system), I see that you're building things, but have no idea how much has been built to date, what's left to build, etc. It shows that work is in progress. But as I used to tell Lindsay Ball when he told me he got three more sites up, was that three when it should have been 10 sites for the month?, or was that three when you only committed to do one site. Lindsay used to take us out to a totally finished single site to show us the progress that he was making, when little or no work was progressing on the other 300+ sites. We need to know what the development plan is (i.e. like a house starting from the foundation through the roof) and then when we see your demos (i.e. demo 1 is the foundation, demo-2 is the framing, demo—3 is the plumbing and electrics, demo-4 is the roof/trusses, demo-5 is the siding, demo-6 is the roofing, demo-7 is the interior, demo- 8 is the garage, demo-9 is the landscaping, etc. Without the context of the whole process from beginning of the exchange to the last key module of the exchange, looking at individual demos doesn't really tell us much. A roadmap and context for all of this is critical to outsider's ability to understand much of what your team shows us as status info. I've been saying this for 6-8 months, but no one seems to either hear or understand. I don't doubt that your team is taking the powerful "legos/services" from Oracle and pasting them together to make

software to meet individual exchange IT infrastructure needs. It's nice to see that work is being done, but without context it's just data.

4. **Scope statement** – in scanning your Maximus issue tracking document, I noticed that Amy was assigned the scope statement and that her solution focused on "use cases." She's missing the point here. Scope starts at the highest level (in and out) for both the corporation and DHS/OHA (what is the overall scope of work for Rocky and for you – then as you functionally decompose these higher-level work efforts/products, you could ultimately get to "use cases." However, you need to start at the high-level scope of work for each effort, and then if you choose, you functionally decompose and detail out work at a lower and more detailed level. If there is any doubt what does into a "scope" statement, there are many industry best practice standards that can be accessed to verify what should be included and the typical table of contents. OJD's QA, InfoSentry typically lists out dozens of industry standards prior to evaluating (QC'ing) any product. They list these standards at the beginning of each document where they evaluating the quality of an IT deliverable. I suggest that if there is a question as to what goes into a particular document that your staff be directed to these industry standards. Another version of a scope statement from Amy was more of a functional decomp of business functions (which depending upon where you're at in a project could be utilized in defining the scope of work that you were focusing on at that given moment). At the highest level a scope of work statement would be develop a healthcare exchange and support IT infrastructure (which would be way too general if that is all that was there, but going all the way down to 100's of use cases is not what is typically included in a project scope statement). The scope of work to be done in a particular iteration might be defined by the use cases (and/or business processes) that are to be addressed, but that is a different thing than a normal scope statement for a project.

Bob C.

From: Lawson Carolyn [mailto:carolyn.lawson@state.or.us]
Sent: Wednesday, September 26, 2012 3:30 PM
To: Cummings Bob
Subject: FW: Materials for this afternoon's meeting

I thought you would be interested in seeing what I presented to Bruce, especially the Oracle link.

From: Lawson Carolyn [mailto:carolyn.lawson@state.or.us]
Sent: Tuesday, September 25, 2012 2:03 PM
To: GOLDBERG Bruce
Cc: Lawson Carolyn
Subject: Materials for this afternoon's meeting

Attached are the documents we communicated about this morning. Dates are included. I will be bringing hard copies.

Also, to follow is the URL for the solution factory. The solution factory contains a recording of the HIX and Modernization iteration demos give for our stakeholders. This is the actual work of Oregon related to HIX and Modernization. It demonstrates what we have built to date. By watching this

every month you can monitor our progress in real time.
http://launch.oracle.com/?oregondhs

See you at 3:30

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