



SPIRIT UPDATE

November 2009

Beginning in 2002 . . .

13 Tribal WIC Programs convened to discuss development of a state-of-the-art WIC Software for program management and delivery of program services.

The Chickasaw Nation was asked to take the lead in this initiative.



SPIRIT Partners

- Chickasaw Nation
- Choctaw Nation
- Muscogee Creek Nation
- WCD
- ITC Oklahoma
- Otoe Missouria
- Osage Nation
- Pueblo of Zuni
- Five Sandoval
- Eight Northern
- ACL
- Santo Domingo
- San Felipe



Early Steps

- Partners developed an MOU for the SPIRIT Consortia
- Planning Contractor engaged – BCA
- 6 meetings with all 13 partners for defining initial Business Requirements
- Developed an RFP for national solicitation of a developer to transfer a web-based/enabled system
- We secured a QA contractor – again BCA
- Hired a SPIRIT Project Manager



Evaluation Process for 7 Proposals

- Establish evaluation criteria
- Developed evaluation tool
- Assembled an evaluation team of IT experts, program experts and contractors (advisors)





USDA FNS Introduces SAM

- STATE AGENCY MODEL System
- Work as multi-state consortia to procure systems
- Must be web-based
- Requires an application for SAM
- Agreement with USDA to participate



SPIRIT Selected as SAM

- Rescinded first RFP on the street
- Released new RFP soliciting proposals for a web-based system only
- Reviewed 6 proposals
- Conducted reference calls
- Requested “show & tell” for 4 systems

Awarded to Covansys (CSC)

- Signed contract in June 2004
- Began Joint Design Sessions with 13 partners
- 6 weeks straight/5 days/week in different cities
- Negotiated increases in scope of work
- Reviewed many versions of DFDD



Design Phase

Approximately 18 – 24 months

Contracted with CNI for Help
Desk support for rollout of all
13 Partner WIC Programs





Ordered for all 13 partners:

- Desktops, Laptops, Signature Pads, Scanners, Printers, Monitors
- Software
- Check stock
- UPS backups
- All equipment for Help Desk

Then planned the delivery schedule



User Acceptance Testing

- January - April 2007
- Host Test Lab – 25 computers for 12 mo
- 850 Scripts were tested in 5 different data bases!
- 3 Checking
- 1 Voucher
- 1 Direct Distribution





SPIRIT Pilot

Chickasaw, Creek and Zuni
rolled out pilot in May 2007-
operated for
3 months





SPIRIT Help Desk

- Learned that we could not continue with sole source
- Would have to put out an RFP
- Put the project at tremendous risk
- Chickasaw Nation volunteered to provide HD services
- January 1, 2008 transitioned from CNI to CN IT



Partner Rollouts

4 separate groups

Completed last rollout
December 15, 2007

Meanwhile . . .



SPIRIT PM retired in Jan 08

Chickasaw Nation staff –
continue Testing SPIRIT, day in and day
out throughout all of 2007 & 2008.

FNS Awards Funds for Transfer of SPIRIT to 3 States early 2008

- ARKANSAS
- MISSOURI
- MONTANA





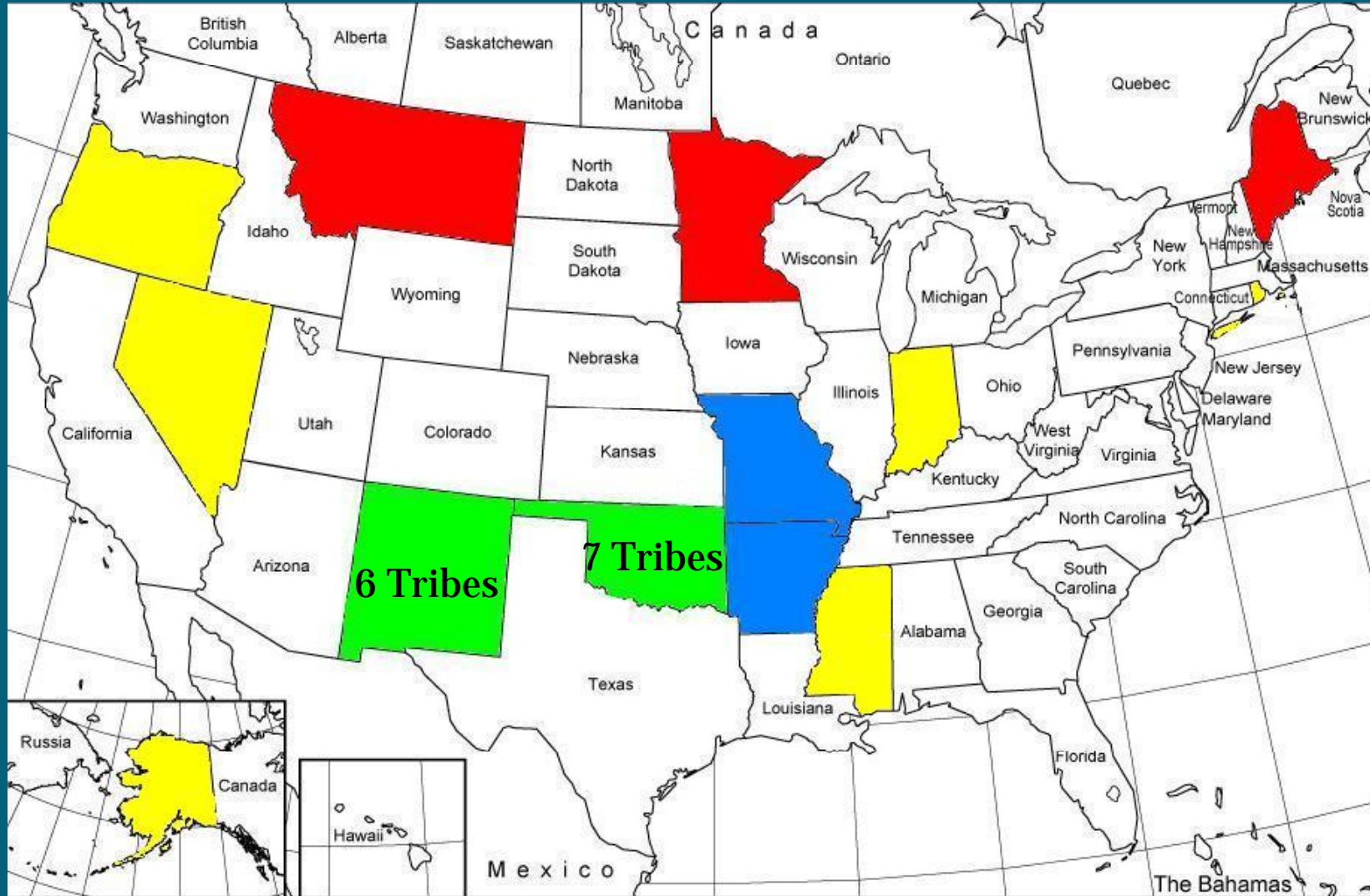
What about a SPIRIT Users Group?

States interested meet with FNS to discuss the future
role of a Users Group

Requested FNS contract with a Facilitator to assist the
group



SPIRIT spreads . . .





Chickasaw Nation staff conduct trainings for all partners



Financial Management
Reports

Vendor Module

Financial Management again
Food Package Implementation
798/Closeout Reporting



New WIC Food Package Regs

- Early 2008
- Design session with 16 state partners in June 2008
- Finalized design in August 2008
- Started testing first release in February 2009
- Rolled out new Food Pkg August 1, 2009



Meanwhile . . . 42 new releases of SPIRIT

JOY, DEBI, MELODY and JULIE continue Testing SPIRIT throughout all of 2009.

Joy is the “Conductor” of all changes to the SPIRIT system.



New Food
Package
Rollout

August
1

more
color
more
flavor
life
more

SPIRIT Activity Continues . . .

- Defined/designed/reviewed change orders for over 300 Enhancements to SPIRIT
- Identified system errors for correction
- Purchased \$\$ millions of dollars of change orders on behalf of other WIC Programs through our contract
- Routine calls with all user states to field questions/challenges
- Hosting states on site
- Negotiations with FNS for resources
- Prepare annual budget requests to FNS
- Annual APDU documentation/Quarterly APDU for FPI
- Quarterly reports/EVM reports
- Provide information for Management Evaluations to other states
- Answer questions for FNS about SPIRIT
- Administer contracts/warranty years with the Developer
- Conducted testing for 42+ releases
- Evaluate means of purchasing replacement equipment/need for license upgrades
- JADs for Food Package and for further development of Vendor Module
- Addressed need for Framework Upgrade
- Ongoing evaluation/definition/implementation of all change orders
- Requested USDA provide Central Product Manager for SUG





Met with CSC Upper Mgmt

- Discuss national picture for SPIRIT
- Requested Covansys CSC employee a SPIRIT Product Manager

Patrice Wolfla began in July 2009

- Encouraged creation of a centralized error/enhancement tracking system for SPIRIT Users Group



SPIRIT USERS GROUP Begins to Take Shape

- First SAM Users Group
- High Visibility
- 20 States and Growing
- Consultant Facilitator
- SPIRIT Users Group Charter



Product Management Office

- USDA is funding the PMO for 3 years
- USDA requested CN host the office initially
- Train PMO and gradually transfer knowledge and responsibilities



What's Next for SPIRIT?

The background is a solid teal color. At the top, there are several wavy, overlapping lines in shades of light blue and cyan, creating a decorative header effect.

Sharing lessons learned
with next 2 SAMs



ARRA . . .

Minnesota & Alaska
received funds to
transfer SPIRIT



EBT - Online

more

color

flavor

3485

8374

9832

8304

*the
Chickasaw
Nation*

WIC

life



SPIRIT is flexible . . .

Many
business rules

To better serve our Moms & Babies!



SPIRIT Users Group

1. Who we are
2. Our Objectives
3. How we achieve our objectives

SPIRIT Users Group

Who are we?

SPIRIT Users

Multiple WIC State Agencies

Using one WIC software/application

To serve our WIC clinic participants

SPIRIT User Group Foundation Principle

We operate from the premise there is only one version of the system code deployed to all User Group members.

The system code has configurable functionality, turned off/turned on, based on the unique requirements of each Agency.

SPIRIT

S

Y

S

T

E

M

- Clinic operations
 - checks, vouchers, direct distribution, EBT
- Reporting
 - Report Generator, 198 defined reports
- Appointment Scheduler
 - (Calendar/Email notifications)
- Vendor Operations
- Financial Operations

What are our objectives?

1. Maintain the integrity of SPIRIT
(Build it once, replicate it many times)
2. Work together to design new capabilities for SPIRIT
3. Equal representation for all State Agencies using SPIRIT
4. Support successful implementation of SPIRIT for each adopting Agency

SUG Membership Requirements

- Membership consists of representatives from all States who are using SPIRIT or have been approved to transfer to SPIRIT
- Members participate in regular User Group conference calls and meetings
 - Knowledge sharing (networking)
 - SPIRIT problem resolution
 - Collectively address new regulations
 - Identify & add new software features

SUG Governance Structure

- Formal Charter
- Formal Change Control Process
- Each State Agency has 1 vote; the final decision for a change is determined by majority vote

SUG Functional Teams

Executive Steering Committee

Change Control Work Group

Project Based Task Forces

Executive Steering Committee

- Overall governing arm of the SUG
- 7 member committee
- Elected for 3 year terms (staggered terms)
- Provide overall leadership/direction
- Responsible for identifying and gathering funding for the SUG
- Make final decision on system code changes and administrative matters

Change Control Work Group

- 6 to 8 elected members
- Overall change assessment body for the User Group
- Review system change requests
- Develop impact analysis for each change request
- Present their analysis to the ESC with procedural recommendations



SUG Membership Advantages for State Agencies

- Network with other users for SPIRIT problem solving
- Network with other users in JAD sessions to design future software capabilities
- Multi-Agency input in the creative design process results in better design functionality
- Teaming to fund new software capabilities results in fast tracking SPIRIT enhancements



SUG Membership Advantages for State Agencies

- Share testing responsibilities and results prior to installing a new release into production
- Provides training opportunities associated with new software capabilities
- Share a common error tracking software and enhancement tracking software

SUG Membership Other Advantages

- Presents a forum to contribute to SUG functions
- Fosters cooperative learning & multi-dimensional problem solving approaches
- Develops group thinking among individuals & fosters negotiation & interpersonal skills
- Opportunity to learn from other users' strengths & weaknesses and sharing experiences with SPIRIT
- Opportunity to teach other users

SUG Central Product Manager

- Facilitate communications with all stakeholders
- Facilitate User Group sharing & training opportunities
- Ensure that the interests of all User Group members are represented
- Serve as an advisory member of the SUG ESC and the CCWG
- Drive the implementation of approved changes
- Review technical deliverables, project phases and milestones before acceptance
- Primary point of contact and responsibility for all SUG issues

SPIRIT PMO Serving:

- Arkansas
- Missouri
- Montana
- Minnesota
- Maine
- Mississippi
- Chickasaw Nation
- Choctaw Nation
- Muscogee Creek Nation
- WCD
- Pueblo of Zuni
- Five Sandoval
- ACL
- Eight Northern
- Santo Domingo
- San Felipe
- Otoe Missouri
- Osage Nation
- ITC Oklahoma
- Alaska

SPIRIT Users Group

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