



NC DEPARTMENT OF **HEALTH AND HUMAN SERVICES**

Charter for the Ongoing Case Management (OCM) PATH NC Users and Business Partnership Groups

**North Carolina Department of Health and Human
Services (NC DHHS)**

Date TBD

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Purpose of the Charter

This Program Charter is an agreement between North Carolina Department of Health and Human Services (NC DHHS) leadership and the Child Welfare Leadership Team (CWLT) to formally authorize the initiation of the Ongoing PATH NC Users and Business Team Partnership Groups. The Charter is a living document and is subject to change. However, significant changes must be approved by the CWLT and NC DHHS leadership.

This Charter describes the Child Welfare (CW) future state system's vision, principles and need. Although it is limited to a high-level overview in its initial form, the charter provides sufficient detail to:

- Show alignment of the vision, principles and needs for the actions, coordination, management and accountability necessary to develop a best value path forward for investments in the future state CW system
- Define the Program's guiding principles and key initiatives
- Communicate program oversight, planning, coordination and accountability mechanisms to stakeholders for the Partnership Group

OCM PATH NC Users and Business Team Partnership

Purpose

The purpose of the OCM PATH NC Users and Business Partnership groups is to develop a coordinated approach to recommended improvements to PATH NC for the different program areas in Ongoing Case Management (OCM). The group includes key NC DHHS CW Program and Technology program area subject matter experts and NC County technology system users to include caseworkers, supervisors, program managers and other specialized areas (i.e. trainer/CQI) from across each region. The individual groups will be the following: In-Home Services, Licensing, Adoptions, Data, and Permanency Planning with possible smaller breakout groups for Foster Care 18-21, LINKS, ICPC, Eligibility, and Financials. OCM PATH NC Users and Business Partnership group will focus on:

Participation and Feedback

Any county agency may recommend improvements to PATH NC through submitting help desk tickets that will be logged as change requests. Change requests that are directly related to practice changes will be implemented based on the Child Welfare Section leadership team priorities. There are times feedback from users on how

these changes could be implemented in the system with a focus on usability is beneficial. Any change requests with a focus on usability may be brought before the OCM PATH NC Users and Business Partnership groups for discussion, evaluation and feedback of county suggestions for improvements to the system. These groups will consider the process flow of the OCM work and how the change request fits within the process flow and provide feedback on the impact on users and the acceptance criteria that would indicate successful improvements to the system. Feedback from these groups on the change results and improvements to the system will be shared with NC DHHS as the Product Manager and Child Welfare Leadership Team make the final decision to implement a change request.

Staff and Contractor Allocation

Ensuring, as much as possible, the efficient and effective use, management, coordination and accountability of State, County and contractors' resources through the recommendations of system improvements focused on prioritization that will have the greatest impact on usability.

Risk Mitigation

The duplication and redundancy of efforts and the need for future rework.

Communication and Organizational Change Management

Ensure transparency by enabling both State and County feedback and the support of all key stakeholders in implementation of improvements to the system. Accomplish this through frequent and open communications, regular conversations, and strategic organizational change management efforts.

OCM PATH NC Users and Business Team Partnership

Vision

A statewide Child Welfare Technology System, consistent with North Carolina's evolving model of child welfare practice, must drive positive outcomes for children, youth and families. This will be done by making timely and accurate information available to inform County and State decision-making, improving PATH NC that provides an efficient and intuitive OCM user experience for child welfare workers, supervisors, and leadership.

OCM PATH NC Users and Business Team Partnership Guiding Principles

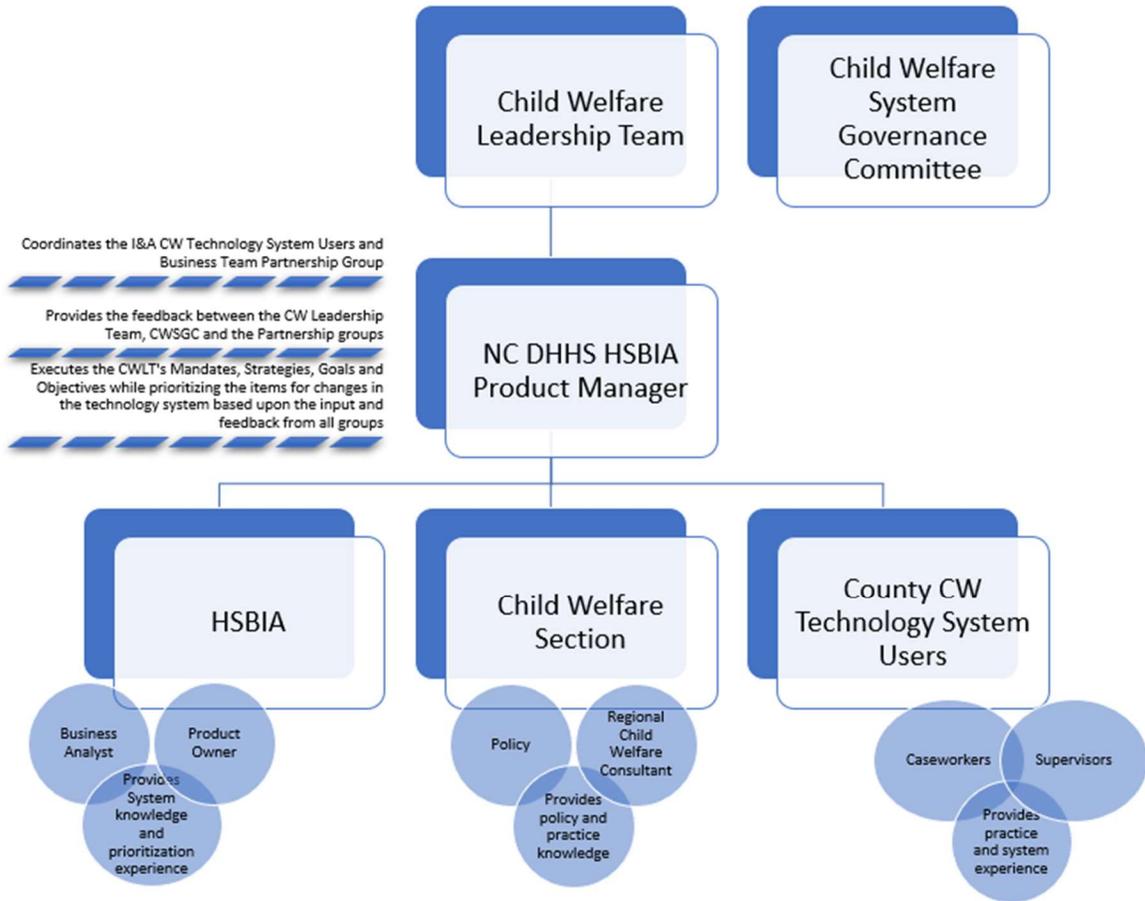
The vision for the group must be guided by the following guiding principles:

- The safety and well-being of children, families, and child welfare staff are of the greatest importance
- The recommended system improvements must be easy and intuitive to use, and efficiently manage data and documents
- Whenever possible, data should only be entered once and used many times
- Counties vary in size, complexity, and available resources. While any system will require some standardization, we must recommend improvements that work for all counties

OCM PATH NC Users and Business Team Partnership Structure, Membership and Responsibilities

The initial functional structure for the OCM PATH NC Users and Business Partnership groups is illustrated in Figure 1.

Figure 1. OCM PATH NC Users and Business Partnership groups structure



Human Services Business and Analytics (HSBIA) CW Team

Purpose and Scope

- The HSBIA Team Product Manager Reports directly to Director Human Services Business Information. The HSBIA Team & Analytics and the Senior Director of Child, Family and Adult Services are responsible for ensuring the strategy, priorities, and investment decisions are coordinated, integrated and executed effectively across the Program's initiatives and workstreams. The business analysts and business owners within this team report to the HSBIA Product Manager and are responsible for specific program areas.

HSBIA Section Representatives

- OCM Business Analysts
- OCM Business Owners for each group

Duties and Responsibilities

- Ensures fidelity to the Program's vision, principles and strategies for all in-scope initiatives, workstreams and decisions of the CWLT
- Provides guidance and recommendations to the CWLT, CWSGC, leadership of each of the Program's initiatives and, as needed, to the contractors supporting the Program's initiatives
- Reports to the CWLT on the overall Program scope and schedule
- Escalates risks and issues to the CWLT with information on how they are being addressed and/or providing recommendations to prevent or mitigate risks and issues
- Brings the agenda (with input from team members) and provides documentation timely in order for team members to review documents prior to meetings.
- Takes notes during the meetings and shares feedback with CWLT and/or PATH NC Team.

NC DHHS Child Welfare Section Team members

Purpose and Scope

- In North Carolina, the Child Welfare Section is the supervising entity with local county departments of social services leading the child welfare casework. The Child Welfare Section establishes the policies and expectations of child welfare agencies and staff within the child welfare section are key members to ensure practice is based upon policy and state expectations.

CW Section Representatives

- OCM Policy consultant(s) who are subject matter experts in each program area

- Safety Section team member(s) for In-Home Services
- Permanency Planning Section team members(s) for Permanency Planning Services
- Licensing Section team member(s) for Licensing Services
- Adoption Section team member(s) for Adoption Services
- Data Section team member(s) for Data Services

Duties and Responsibilities

- Review documents for discussion prior to meetings and obtain feedback from other team members within the Safety Section and engage with Section Chief as needed
- Provide feedback and engage during meetings, representing requirements according to policy/practice standards and any upcoming changes that may impact the system as they relate to the items being discussed.
- Provide suggestions as appropriate or design or considerations for system improvements

NC PATH NC OCM County User members

Purpose and Scope

- In order for PATH NC to be successful, the voices of those who do the work must be heard from agencies of all sizes from across the state. Additionally, no matter how well developed a system is, there must be buy in from end users. Having established opportunities to engage regular users at various points within PATH NC improvement process will allow for feedback from the users and opportunities to gain buy in to system improvements.

County Representatives:

- NC has 100 counties that NC DSS has divided among 7 regions. Beginning **Date TBD**, Groups -21 will be utilizing PATH NC with Groups 2-7 rolling out over the next year. Group 1 and Group 2 directors will approve up to 7 members. The directors from the remaining groups should submit up to 7 members to the regional directors to consist of either OCM Caseworkers, Supervisors, Program Managers or other specialized positions (i.e. CQI, trainers for OCM) who are regular PATH NC users. When there are multiple counties within a region, members of the group should include counties of a variety of sizes. The regional directors will approve the final list of participants for these groups . The group memberships will be updated as more counties adopt PATH NC for different OCM Groups.

New members will be a result of either

- New Counties entering PATH NC or

- A current member leaving (i.e. they leave their agency, no longer work in child welfare, or have other priorities). If a current member leaves a group, they should notify their Director and the Child Welfare Business Manager. The Director will have the opportunity to put forth a replacement to their regional director, and if they do not have a name to put forth, the Child Welfare Business Manager will work with the Directors of that region in an effort to find a replacement for the next cycle. The regional director will approve all new members.

New members will be invited to join the group in January or July and will be required to attend an onboarding session with the HSBIA team to onboard them in preparation for the group meetings.

Duties and Responsibilities

- Review documents for discussion prior to meetings and obtain feedback from other case workers/supervisors in a region
- Provide feedback and engage during meetings, representing feedback from a variety of case workers/supervisors in the region
- Provide suggestions as appropriate or design or considerations for system improvements based upon feedback from a variety of case workers/supervisors in the region
- Complete testing of all approved change requests and enhancements prior to being released into production.

OCM PATH NC Users and Business Team Partnership Operating Norms

The following are the operating norms for the OCM PATH NC Users and Business Team Partnership group:

- Team will meet approximately 8 times per year via Microsoft Teams for no more than 2 hours each meeting:
 - Once Prior to each PATH NC Program Integrity quarter to discuss potential priorities for the upcoming quarter/future quarters
 - Once in the middle of PATH NC quarter to obtain feedback from items completed the last quarter and discuss potential user story questions for the work currently being done.
- Each team meeting will begin with a reminder of the PATH NC Guiding Principles (Image 2 below) and recommendations made will incorporate these principles.

- Team members agree to respect the opinions of all members and ensure that all voices and opinions are heard and understood, with a goal of creating an environment that promotes and encourages safe and open communication
- Team members will actively participate in meetings and provide support, recommendations, and concerns to support planning and execution of the OCM County User and Business Team Partnership effort in achieving the vision and goals for improvements to PATH NC for the different OCM program areas.
- Team members will demonstrate commitment and accountability in fulfilling their defined responsibilities
- Team members will, in a timely manner, share challenges, risks and issues they face in fulfilling their responsibilities when there is a possibility that they will not meet timelines or outcomes/outputs that are expected
- Team members will give advance notice if they will be unable to attend. A team member will be designated to follow up after meetings with any members who were absent as may be needed

Child Welfare Leadership Team (CWLT)

Purpose and Scope

- The CWLT provides program oversight and is responsible for ensuring that the investments in the Child Welfare Practice and Technology Program's in-scope initiatives and workstreams are successful in achieving the vision, strategic goals and objectives for the future state Child Welfare System. The CWLT includes key NC DHHS CW Program and Technology leadership and CW Section Chiefs and other key Program and Technology staff.

Duties and Responsibilities

- Review, prioritize and oversee the CW Practice and Technology Program's in-scope initiatives and workstreams
- Coordinate efforts with the Child Welfare System Governance Committee (CWSGC) and the Unified Leadership Team (ULT)
- Provide for robust County involvement in the planning and execution of the Program's initiatives and workstreams
- Establish the Program's mandates
- Make disciplined and wise investment decisions (People, Time, Technology and Dollars)
- Approve any Program changes (e.g., schedule, scope and resources) to previously approved Program initiatives and workstreams
- Resolve escalated risks, issues and conflicts across Program initiatives

- Meeting Logistics: At least biweekly standing meetings, no quorum required

Additional teams for NC DHHS within the CWLT include (but are not limited to):

Child Welfare Executive Leadership Team:

The Child Welfare Executive Leadership Team consists of the four section chiefs that are responsible for service provision and Child and Family Services Plan and Child and Family Well-Being Coordinators. This team is responsible for organizing and planning delivery of child welfare services in North Carolina. This is a weekly meeting that focuses on strategic appropriation of staff time and the integration between sections.

Duties and Responsibilities

- Coordinate efforts between sections on shared outcomes
- Establish the Program's mandates
- Coordinate communications and shared assignments
- Set agenda for Unified Leadership Team and Child Welfare Full Leadership Team
- Resolve escalated risks, issues and conflicts across sections
- Meeting Logistics: Weekly standing meetings, no quorum required.

Child Welfare Full Leadership Team:

The Child Welfare Full Leadership Team consists of all leaders in child welfare, policy consultants and program coordinator. This includes the Child Welfare Data Analytics Manager and the Child Welfare Business Manager. The purpose of the team is to provide up to date information to state child welfare staff and allow critical feedback to guide decision making.

Duties and Responsibilities

- Coordinate efforts between sections on shared outcomes
- Coordinate communications and shared assignments
- Meeting Logistics: Weekly standing meetings, no quorum required.

Child Welfare System Governance Committee (CWSGC)

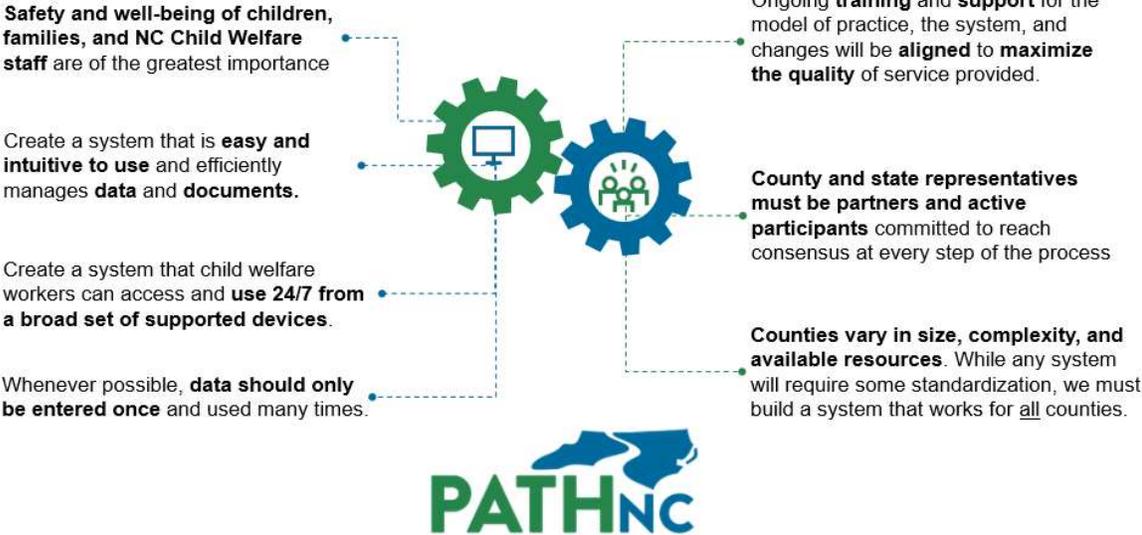
Purpose and Scope

- The CWSGC is to bring State and County leaders together in partnership to recommend how best to enhance and augment the current North Carolina Families

Access Services through Technology (NCFAST) operating system for child welfare services and operations consistent with the adopted vision and guiding principles. The CWSGC developed the Guiding Principles which are to keep us focused on the goals for the future state Child Welfare Technology System.

Figure 2. Guiding Principles

PATH NC Guiding Principles



Duties and Responsibilities

- Ensure fidelity to the future state vision for the future state's CW Technology System and Guiding Principles
- Review the CWP&T Blueprint (Product) Roadmap and propose revisions to the roadmap going forward. Endorse or request revisions to the roadmap and associated plans
- Prioritize investments in system enhancements and augmentations
- Hold the CWP&T effort accountable for sufficient and effective stakeholder (State, County and field) participation
- Monitor the effective and cost-efficient application of information technologies, related personnel resources and funding
- Review escalated issues involving child welfare technology and related business decisions
- Communicate decisions and recommendations regularly to the CWLT
- Meeting Logistics: As defined by the CWSGC