

Agenda: California Systems Integration and Interoperability Symposium

May 21-23, 2013 • Sacramento, California



Tuesday | May 21

10:30 a.m. – 12:00 p.m. **Registration and Networking**

(Lunch on your own prior to start of symposium)

12:00 – 12:30 p.m.

Welcome and Introduction

Shell Culp, Chief Deputy Director, California Health and Human Services Agency, Office of Systems Integration; Project Sponsor, State Systems Integration and Interoperability Project (SSIIIP)

To kick off the first symposium, the sponsor of the California State Systems Integration and Interoperability Project will outline the purpose and intended outcomes of the first Interoperability Symposium, as a precursor to the important work at hand – creating a roadmap for information sharing, interoperability and service improvements among HHS agencies throughout California. Presenters at this session will also brief participants on the overarching goals of the State of California's Interoperability Grant, one of seven state grants funded by the U.S. Department of Health and Human Services Administration for Children and Families.

12:30 – 1:00 p.m.

Overview of the Agenda, Approach and Prior Learning

Facilitator: Daniel Stein, Managing Partner/Cofounder, Stewards of Change Consulting

In this session, the presenter will delve deeper into the agenda and the desired takeaways from each section and also provide an orientation to the key concepts, approaches, and tools that will be used during the symposium to increase awareness and understanding of overall goals, opportunities, challenges and potential solutions for increasing information sharing and enhancing interoperability. Further, the presentation will examine relevant elements and lessons learned drawn from prior Symposia and put sharper focus on the concepts encompassed in SOC's Human Services 2.0 methodology guiding this initiative.

1:00 – 2:45 p.m.

Interactive Session - Transforming Policy, Structure and Practice to Achieve Interoperability

Daniel Stein and Stewards of Change Consulting Team

During this first Interactive session we will begin to identify the key policy, structure and practice considerations that participants believe the State of California and California counties need to address to reach their longer-term interoperability goals. Through a peer-interview process participants will focus on the most significant opportunities and barriers to health and human service transformation that will impact interoperability and information sharing over the coming months and years. Key findings, observations, questions, and hypotheses from these conversations will be recorded using a graphic mapping process. We will use these artifacts to build our roadmap throughout the Symposium. These materials, along with videos and other presentation content, will comprise a summary at the completion of the Symposium.

2:45 – 3:15 p.m. **Break**

3:15 – 4:15 p.m.

Making The Case for Improving Information Sharing and Interoperability in California

Moderator: Rick Friedman, (Former) Director of State Systems, Center for Medicaid & State Operations

PRESENTERS

Will Lightbourne, Director, California Department of Social Services

Justice Richard Huffman, California Fourth District Court of Appeals

Richard Gold, Senior Consultant, Stewards of Change Consulting

Speakers at this session will offer their perspectives on the value and urgency of pursuing horizontal and vertical information sharing among California's health and human service programs and service providers. By accomplishing this goal, it will benefit systems outside of these programs, including the courts, correctional systems and educational institutions. The presenters will articulate the value proposition and intended outcomes from connecting health and human service systems to improve the effectiveness of service delivery and enhance efficiency of operations.

In addition, they will provide an overview of a unique 'Proof of Concept' model being developed which will demonstrate the value of information sharing to automate a series of processes, which are conducted manually today, and are required for authorizing the use of psychotropic medications for children in foster care. The session is designed to stimulate participants' thinking and begin the process of identifying high-impact technologically enabled initiatives that can be rapidly expanded, transferred and implemented broadly across the State and counties. An overnight assignment using the Psychotropic Medication Proof of Concept will be introduced.

4:15 – 5:00 p.m.

Interoperability From One County's Perspective: *Live Well San Diego*

Nick Macchione, Director, Health and Human Services Agency, County of San Diego

In this session, the Director of the County of San Diego County Health and Human Services Agency will present an overview of *Live Well San Diego* – a nationally recognized innovative model for delivering holistic health and human services. Mr. Macchione will discuss San Diego County's overall strategic approach, key objectives and early results. He will also focus on the opportunities, challenges and development plans that are core to successful delivery of effective and efficient services to customers across the county.

5:30 – 7:00 p.m. **Reception**

Sheraton Grand Sacramento Hotel (Cash Bar/Dinner on your own)

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Wednesday | May 22

7:30 – 8:30 a.m. **Coffee and Networking**

8:30 – 8:45 a.m.

Overnight Thoughts and Reflections

8:45 – 9:00 a.m.

A View From the Bench

The Honorable Vance Raye, Presiding Justice, California Third District Court of Appeal will draw upon his career in the California Judiciary to present his perspective about efforts to create systems that are better connected and share complete and timely information about the population they serve.

9:00 – 9:45 a.m.

Using the Psychotropic Drug Proof of Concept to Examine Organizational Redundancy

PRESENTERS

Michael Nash, Presiding Judge of Juvenile Court, Los Angeles County

Richard Gold, Senior Consultant, Stewards of Change Consulting

During this session the presenters will review the Proof of Concept in more detail and conduct a discussion about the intended outcomes from exploring this specific use case. Symposium participants will be guided through an exercise to explore and elicit information about other redundant and/or manual processes that could benefit from automation and enhanced information sharing.

9:45 – 10:15 a.m. **Break**

10:15 – 12:00 p.m.

California's "As-Is" Interoperability Landscape Roundtable Discussion

Moderator: Carlos Ramos, Secretary, California Technology Agency

PANEL PARTICIPANTS

Shell Culp, Chief Deputy Director and Agency Information Officer, Office of Systems Integration

Dr. Linette Scott, Chief Medical Information Officer, California Dept. of Health Care Services

Chris Cruz, Deputy Director and Chief Information Officer, California Dept. of Health Care Services

As the basis for developing a roadmap for the future of information sharing and interoperability California's Information Technology leaders will discuss essential elements and attributes of California's "As-Is" Health and Human Service Information Technology environment. Through a Roundtable format presenters will discuss legacy and emerging IT systems as well as the constraints and opportunities faced by agencies and programs across the state. Table discussions will be conducted to capture participant feedback on parts of the "As-Is" landscape.

12:00 – 1:00 p.m. **Lunch (provided)**

1:00 - 3:00 p.m.

Interactive: Preparing the Foundation for California's Interoperability Roadmap

Daniel Stein, Managing Partner, Stewards of Change Consulting

This session will provide a structured and highly interactive opportunity for participants to begin outlining the foundational ideas and goals for California's HHS Interoperability Roadmap. To spur fresh thinking, the session will utilize the "Back to the Future" visioning exercise – an engaging way for groups to create a tangible future vision regarding California's HHS programs, services and systems

3:00 – 3:30 p.m. **Break**

3:30 – 4:15 p.m.

Leading Change in Large Organizations: The U.S. Department of Veterans Affairs

Dr. Kizer, MD, MPH, Director of the Institute for Population Health Improvement, UC Davis Health System, and Distinguished Professor, UC Davis School of Medicine (Department of Emergency Medicine) and the Betty Irene Moore School of Nursing

Dr. Kizer has lived through and met the challenges of leading large-scale organizational change and service delivery transformations. He will share from his experiences as Under Secretary for Health, for the U.S. Department of Veterans Affairs (VA), where he served as Under Secretary for Health from 1994 to 1999. As the highest ranking physician in the federal government and chief executive of the nation's largest healthcare system - with a \$22B budget, 200,000-plus employees and more than 1100 care delivery sites across the U.S. - Dr. Kizer is widely credited with architecting and driving the greatest transformation of VA healthcare since the system was created in 1946. He led the largest electronic health record implementation in U.S. history and pioneered several major IT innovations during his VA tenure.

4:15 – 5:15 p.m.

Interactive Session: *Are We Ready for Change?*

Rick Schleusener, Senior Consultant, Stewards of Change Consulting

Every change initiative generates hope and cynicism, excitement and dread, anticipation and fear. For California's interoperability efforts to succeed, we must plan for and address the inevitable challenges of organizational and personal disruption, uncertainty, and anxiety. We will introduce key concepts of organizational change and facilitate an experience to elicit the concerns, hopes and other issues that are top of mind when planning for and implementing change. Session participants will be exposed to a comprehensive organizational change management process that will support the desired changes and outcomes. We will use this session to create a high-level baseline of the group's readiness for change.

5:15 – 5:30 p.m.

Overnight Assignment

6:00 p.m. **Informal Reception**

Chops Sacramento, 1117 11th Street (Cash Bar/Dinner on your own)

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Thursday | May 23

7:30 – 8:30 a.m. **Coffee and Networking**

8:30 – 8:45 a.m.

Welcome

Introduction: *Debbie Rose, Director, California Health and Human Services Agency; Office of Systems Integration*

Secretary Diana Dooley will provide a call to action for Symposium participants and share her vision and goals for transforming California's Health and Human Services Agency.

8:45 – 10:00 a.m.

California's "To-Be" Information Sharing and Interoperability Landscape

Introductory Comments: *Pamela Lane, MS, RHIA, CPHIMS, Deputy Secretary, Health Information Exchange, CA Health and Human Services*

Moderator: *Dr. Linette Scott, Chief Medical Information Officer, California Department of Health Care Services*

PRESENTERS

Valerie Barnes, Senior Technical Consultant, Stewards of Change

Adam Dondro, Assistant Director, Horizontal Integration, California Department of Social Services

Gretchen Hernandez, California Health and Human Services Deputy Agency Information Officer/Office of Systems Integration Chief Information Officer

This session will provide an overview of the State's HHS "To-Be" information technology environment that is in development and also being designed as part of the State's Federal Interoperability Grant. Presentations will include an orientation to new national standards that are being developed to facilitate interoperability among programs. Presentations from some of the state's most forward-thinking interoperability experts will explain these standards including the Medicaid Information Technology Architecture (MITA), the new National Human Services Interoperability Architecture (NHSIA) and the National Information Exchange Model (NIEM). Learning from this session is intended to support our upcoming "To-Be" roadmap design session.

10:00 – 10:30 a.m. **Break**

10:30 – 12:00 p.m.

Getting to Yes!

Moderator, *Larry Bolton, Counsel to the Department of Social Services and Office of Systems Integration*

PANEL PARTICIPANTS

Richard Gold, Senior Project Manager, Stewards of Change Consulting

Suzanne Giorgi, Senior Counsel, California Office of Health Information Integrity

Kristina Robb, Deputy County Counsel, San Bernardino County

Rebecca Gudeman, Senior Attorney, National Center For Youth Law

Presentations and discussions will focus on innovative practices and projects from California that are enabling information sharing, while respecting confidentiality and privacy rights, and securing the information once it is shared. The focus of this session is "getting to yes" rather than discussing the barriers to information sharing. Panelists will share recent efforts, successes, and ongoing projects in the areas of health, public assistance, child welfare and courts. The panel will present promising approaches and technologies that can manage access, ensure security and protect privacy within interoperable environments.

Following the presentations, table discussions will focus on the impact of expanding data sharing including the process for accessing data from another agency/program, determining the current process for obtaining that specific data, and outlining the confidentiality and other policy barriers to sharing the data. These discussions will examine questions about the impact of interoperability initiatives including Health Information Exchange, Electronic Health Records and changes due to the Affordable Care Act.

12:00 – 1:00 p.m. **Lunch**

1:00 – 3:00 p.m.

Interactive Workshop: Designing California's Interoperability Roadmap

Stewards of Change Consulting Team

In this final workshop, participants will bring together and synthesize the key learning that emerged throughout the Symposium to create a draft Interoperability Roadmap. This Roadmap will be used to inform and complete the State's interoperability planning over the summer and will incorporate the core themes, major findings, key strategies for implementation, primary opportunities and hurdles, and consensus on next steps that emerged from the symposium. We will focus on four important areas including governance, confidentiality, technology and change management.

The Roadmap will also serve as a tool, along with the other artifacts from the symposium, for communicating about the most salient topics over the coming months. Symposium participants can use these materials to disseminate these ideas within their own organizations and also continue collaborating with symposium colleagues and the research and design team in preparation of the Roadmap and the next symposium.

3:00 – 3:30 p.m. **Break**

3:30 – 4:30 p.m.

Going Forward and Next Steps

Debbie Rose, Director, California Health and Human Services Agency; Office of Systems Integration

Daniel Stein, Managing Partner, Stewards of Change Consulting

The closing session will be devoted to identifying specific ways that participants can stay engaged, enhance their knowledge, participate in building the State's Interoperability Roadmap, and help plan the second Interoperability Symposium later this summer. We will review the web-based collaboration site and social media groups which can facilitate ongoing dialogue, idea sharing, targeted workgroup activities, and networking among participants.