JIS Policy Board Meeting

New Case Management System (CMS)

November 6, 2008

Sharon R. Bock
Clerk & Comptroller
Palm Beach County
Agenda New CMS System

• Introductions, CMS Vision & Mission  Clerk Sharon Bock
• Project Timeline, Governance & Communications  Alice Djubin
• Requirements Gathering  Jim Douglas
• Requirements Analysis Overview  Waterhole Software
• Next Steps  Alice Djubin
• Questions & Answers  Alice Djubin
Vision: To serve as a model platform, meeting the evolving needs of the user community.

Mission: Focusing on the public’s right to access court records, the CMS Project employs industry best practices to implement and maintain a secure, reliable, accurate and cost-effective justice information system that enables the effective sharing of data between justice system partners.
New Case Management System

Mission Possible
Leadership Team
(Clerk Chief Officers, Court Administrator & Clerk Directors)

Steering Committee
(Stakeholder Chairs, Clerk Court Director)

Stakeholder Relations Committees
C&C | SA | PD | Courts | Sheriff

Users Groups
(Bar Assoc, Media, ISS, PBC League of Cities, CJC, Bail Bond Assoc, DVC)

And

Community Groups

Mission Possible
CMS Preliminary Timeline

- Preliminary Site Visits
- Clerk Workflow
- Select Req’mnts Vendor
- Launch Governance
- Partner & Clerk Req’mnts
- Release CMS ITN
- Select CMS Vendor Finalist
- Fit/gap Analysis with Vendor Finalist
- Finalize Implementation Contract
- Information Exchange Development
- Criminal Training / Conversion / Implementation
- Civil, UFC Training / Conversion / Implementation

Mission Possible
Project Best Practices

- Build on successful ERP project model
- Establish framework for governance and communications
- Engage partners & stakeholders
- Incorporate lessons learned
- Dedicated subject matter experts

Mission Possible
CMS Timeline

- Preliminary Site Visits
- Clerk Workflow
- Select Req’mnts Vendor
- Launch Governance
- Partner & Clerk Req’mnts
- Release CMS ITN
- Select CMS Vendor Finalist
- Fit/gap Analysis with Vendor Finalist
- Finalize Implementation Contract
- Information Exchange Development
- Criminal Training / Conversion / Implementation
- Civil, UFC Training / Conversion / Implementation

Mission Possible
Gathered Key Workflows in Clerk’s Office (200+ pages)

- Criminal
- Civil
- Unified Family Court
- Accounting
- Information Technology

Mission Possible
Requirements Gathering
- CMS Site Visits -

- Bay County
- Collier County
- Duval County
- Lee County
- Polk County
- Sarasota County
- Numerous calls & discussions with other Clerks Offices (Orange, Hillsborough, Pinellas...)
- Court Technology Conference

Mission Possible
Clear Requirements are the Foundation for Successful Results

- Conducted a national search
- Strong knowledge of Florida courts
- Follow Best Practices in requirements gathering
- Partner with strong skills in Court Operations & Justice Information Exchange Technology
Waterhole Software

Aaron Gorrell
President

Moira Rowley
Principal Consultant

Mission Possible
Waterhole Software Methodology

- Lessons Learned
- Standards & Best Practices
- Analysis Methodology & Process
- Moving Forward

Mission Possible
Requirements Schedule

- Needs Analysis Meetings (11/05/08 – 11/21/08)
  - 12 Clerk meetings
  - 12 Stakeholder meetings
- Consolidate Requirements (11/24/08 – 11/28/08)
- Confirm Requirements (12/01/08 – 12/12/08)
  - Stakeholders
  - Clerk
- Deliver ITN Requirements (12/17/08)

Mission Possible
CMS Next Steps

- Conclude requirements analysis within Clerk’s office
- Conduct requirements analysis with Stakeholder Groups
- Consolidate requirements and validate
- Develop ITN from requirements
- Release ITN in December 2008
- Your Support & Commitment
Questions & Answers

Mission Possible

Thank You!
Adjourn

Thank You

Mission Possible