



*Dedicated to the Health
Of the Whole Community*

Mental Health Department

Mental Health Services Act Capital Facilities and Technological Needs

Consumer Learning Centers Project Enclosure 3

April 15, 2009

**Mental Health Services Act
Capital Facilities and Technological Needs**

Consumer Learning Centers - Enclosure 3

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Consumer Learning Centers (CLC) – Executive Summary

Project Type:	Consumer Empowerment
Purpose:	To provide additional support for consumers in MHSA recovery programs and living in the community by setting up supervised computer labs and basic PC skills training in established Wellness Centers across the County.
Overview:	<ul style="list-style-type: none"> • This project will establish computer labs in up to four Wellness Centers for consumer use. • Each lab will have up to 10 PCs available for consumer use and training seminars. • The labs will offer consumers: <ul style="list-style-type: none"> • Broadband Internet access; • Basic training in PC skills and MS-Office applications; • Assistance with job search techniques; • Assistance with resume building; • Training in Internet search techniques for health, housing and other resource information; and • Training in online business transactions such as banking and bill paying.
Need:	The need for this project was identified during meetings with consumers and staff. There is currently one consumer PC lab located in one facility. That lab has outdated equipment and is not staffed appropriately. Consumers and staff see great potential in a well-planned and modernized lab environment.
Project Management:	<p>This project will be accomplished in phases. A prototype Learning Center will be built in one Wellness Center. User feed-back and experience will be solicited to determine usefulness and effectiveness of the project. Once a solid model is established, other labs will be opened.</p> <p>An advisory group of staff and consumers will be formed to plan the model Learning Center and review its effectiveness post-implementation.</p>

<p>Resources:</p>	<p><u>Staff:</u> SCVHHS existing resources will lead the project and form the project team. The labs will be staffed with a mix of full-time consumer staff and County staff. The labs will require staff to supervise and monitor activity and conduct training classes. Staff should be able to handle basic troubleshooting of PCs and printers and be able to change the toner / printer cartridges when necessary. They will also keep up with ordering supplies. Technical support will be provided by existing County resources.</p> <p><u>Equipment:</u> New PCs, printers, scanners, supplies and workstation furniture will be required.</p> <p><u>Software:</u> Any software needed will conform to County Standards. No custom development of software is envisioned. Additional licenses for existing software may be required.</p>
<p>Technical Considerations:</p>	<p>High speed internet access will be provided through the County's network. Existing County security standards will be enforced in the centers. All hardware and software will conform to County Standards and be maintained by existing County staff.</p>
<p>Timeline:</p>	<p>March 2010 – March 2011</p>
<p>Estimated Cost:</p>	<p>\$ 572,000</p>

Enclosure 3
Exhibit 3

Technological Needs Project Proposal Description

County Name: Santa Clara Date: March 6, 2009

Project Name: Consumer Learning Centers

Check at Least One Box from Each Group that Describes this MHSA Technological Needs Project

- New System.
- Extend the Number of Users of an Existing System.
- Extend the Functionality of an Existing System.
- Supports Goal of Modernization / Transformation.
- Support Goal of Client and Family Empowerment.

Indicate the Type of MHSA Technological Needs Project

> Electronic Health Record (EHR) System Projects (Check All that Apply)

- Infrastructure, Security, Privacy.
- Practice Management.
- Clinical Data Management.
- Computerized Provider Order Entry.
- Full Electronic Health Record (EHR) with Interoperability Components (Example: Standard Data Exchanges with Other Counties, Contract Providers, Labs, Pharmacies).

> Client and Family Empowerment Projects

- Client/Family Access to Computing Resources Projects.
- Personal Health Record (PHR) System Projects
- Online Information Resource Projects (Expansion / Leveraging Information-Sharing Services)

> Other Technological Needs Projects that support MHSA Operations

- Telemedicine and Other Rural / Underserved Service Access Methods.
- Pilot Projects to Monitor New Programs and Service Outcome Improvement.
- Data Warehousing Projects | Decision Support.
- Imaging / Paper Conversion Projects.
- Other.

> **Indicate the Technological Needs Project Implementation Approach**

Custom Application

Name of Consultant or Vendor (if applicable):

Not applicable for this project.

Commercial Off-The -Shelf (COTS) System

Name of Vendor:

Not applicable for this project.

Product Installation

Name of Consultant or Vendor (if applicable):

Not applicable for this project.

Software Installation

Name of Vendor:

MS-Office and other utilities, such as anti- virus, COTS software will be installed on the Consumer Learning Center work stations.

Consumer Learning Centers (CLC)

• Introduction to Santa Clara County Organization and Its Acronyms

The Santa Clara Valley Health and Hospital System (SCVHHS) is the Santa Clara County organization that manages, operates and directs all healthcare services within the County. It is an umbrella organization comprised of the following organizations:

- The Valley Medical Center (VMC)
- Public Health Department (PH)
- Department of Alcohol and Drug Services (DADS)
- Mental Health Department (MHD)
- Children's Shelter and Custody Health Services (CSCHS)
- Valley Health Plan (VHP)
- Community Outreach Programs
 - School-Linked Services System (SLS)
 - Valley Children's Health Initiative (Valley CHI)
 - Community Health Services (CHS)

SCVHHS has a centralized Information Systems Department (SCVHHS IS) that supports its organizations. In addition, Santa Clara County has a centralized Information Systems Department (ISD) that provides network and computing services to all County agencies.

Project Management Overview

The County currently maintains a Consumer Learning Center in one wellness center and will upgrade the current lab and expand labs to other centers and venues assuring accessibility from all areas of the County. Because of the existing model for this project and the low cost, this is considered a low risk project.

This project will:

- Begin by upgrading the existing lab to serve as a prototype for others. During the planning and design phases, consumer and family feedback will be solicited to identify their needs and innovative ideas on how to improve the current installation.
- Develop training materials and provide staff to train consumers in basic computer skills, such as, internet access, effective searches for employment, developing resumes, housing resources, financial activities, bill paying and use of Microsoft Office software.
- Require IS staffing to maintain the labs and the procurement of hardware, software and

upgrades.

- Once the prototype has been implemented and in use for a period of time, the County will review and evaluate its effectiveness. The prototype model will be adapted as needed based on feedback and experience. As facilities and funds become available the County will sequentially roll-out the model and establish Consumer Learning Centers in up to 3 other sites.

Project Costs

The cost estimates for development of the Consumer Learning centers are documented in the *Budget Summary* included in Exhibit 3. The supplemental resource needs for development and ongoing maintenance are also included in the *Budget Summary*.

Nature of the Project

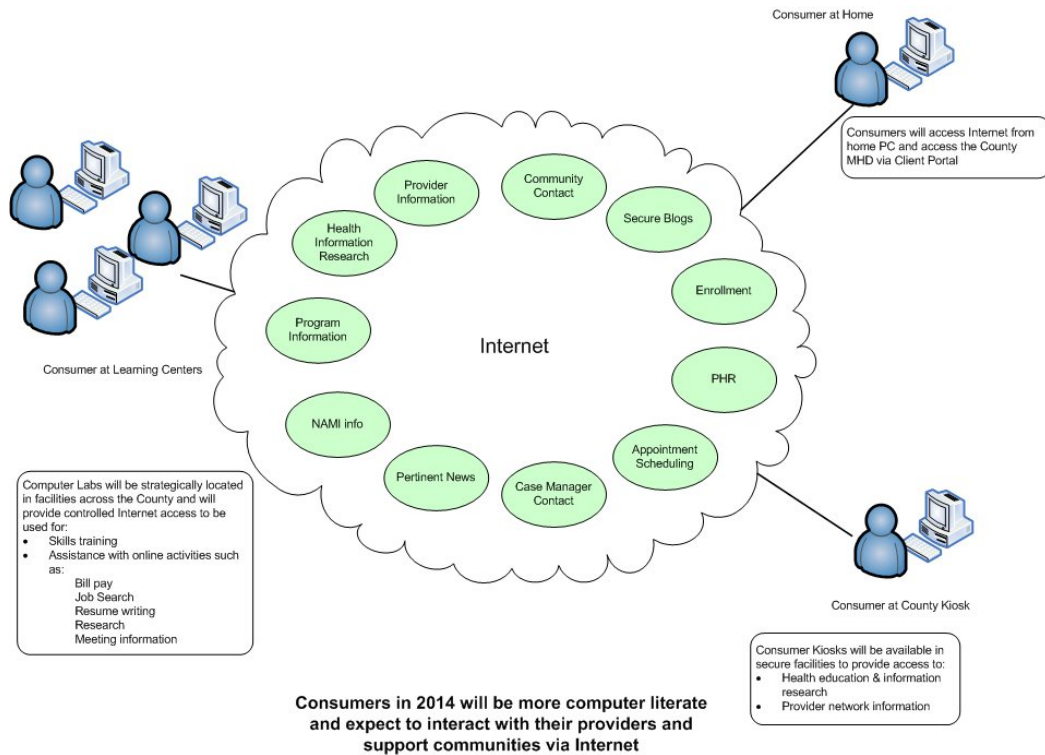
- The extent to which the Project is critical to the accomplishment of the County, MHSA, and DMH goals and objectives.

The County is committed to activities that empower consumers and their families and we believe that access to Consumer Learning Centers (CLC) is important for supporting consumer independent living goals. The CLC reinforces the County commitment to offering consumers and their families the means to empowerment with expanded access to sophisticated computers, printers, scanners, MS Office software, secure Internet access and skills training.

These labs will become an integral part of their recovery and support. The staffing plan includes employing qualified consumer aids to monitor the labs and respond to basic inquiries. The objectives of the project are to:

- Provide skills training to initiate or enhance consumer skills in the use of technology
- Provide assistance with various online activities that may assist consumers, such as:
 - Job searches
 - Financial transactions – examples include, bill paying, banking
 - Employment opportunities
 - Communication about meetings, service resources, social events and other pertinent news
 - Effective Internet resource searches, and
 - Development of blogs and chat room opportunities.
- Provide training and support for the use of MS Office software tools for activities, such as:
 - Resume writing
 - School related work
 - Other consumer identified needs.

A graphical depiction of the Consumer Learning Centers through 2014 is provided below:



• The degree of centralization or decentralization required for this activity.

The Consumer Learning Centers will be distributed strategically, at or near, Wellness Centers. Currently the County maintains three geographically distributed Wellness Centers. The intent is to make Consumer Learning Centers access available across the County. As currently planned, up to 4 sites may be developed to include Computer Learning Centers.

Maintenance of the computer network and Internet access will be centralized and part of the SCVHHS system.

Development of training materials and coordination of classes will be a centralized activity.

• The data communication requirements associated with the activity.

The consumer labs will be maintained locally and will have access to the County’s high speed Internet. The intent of the consumer lab access is provide internet, MS Office and home user-type software that would advance consumer access and opportunities for peer supported computer usage. Security and confidentiality will be supported using the standards currently followed within the County systems.

- The characteristics of the data to be collected and processed, i.e., source, volume, volatility, distribution, and security or confidentiality.

This area of discussion is not relevant to Consumer Learning Centers.

- The degree to which the technology can be integrated with other parts of a system in achieving the Integrated Information Systems Infrastructure.

This area of discussion is not relevant to Consumer Learning Centers.

Hardware Considerations

- Compatibility with existing hardware, including telecommunications equipment.

SCVHHS, of which the Mental Health Department (MHD) is a part, has a broad set of well defined technology standards in place today.

The hardware to be used in the Consumer Learning Centers will consist of standard hardware and will utilize existing software and telecommunication standards.

A 'standard desktop build' will be defined to meet requirements developed for Consumer Learning Centers user needs. Existing vendor relationships will be utilized for purchasing needed hardware and software.

A copy of SCVHHS Technology Standards and Network Management policies are included in Appendix B of Exhibit 2.

- Physical space requirements necessary for proper operation of the equipment.

Consumer Learning Center equipment will be housed in areas designated within existing SCVHHS facilities. SCVHHS will ensure that adequate space is made available in each selected facility and that space requirements take into account all applicable data security and privacy requirements.

- Hardware maintenance.

All hardware maintenance will be performed by existing SCVHHS staff.

A copy of the Network Management and the Table of Contents for a confidential policy related to Business Continuity Plan are included in Appendix B of Exhibit 2.

- Backup processing capability.

Due to the nature of the activities performed by clients in the Consumer Learning Center facilities, no backup processing capability will be required. No data will be saved to local hard drives and computers will regularly be 'cleaned' of any user-generated files or content.

In order to facilitate the 'standard build' concept of deployment, a 'standard image' will be created that will allow IS staff to efficiently and consistently build and/or rebuild computer images as necessary to support the 'cleaning process' and deployment of new computers.

- Existing capability, immediate required capacity and future capacity.

Currently one Consumer Learning Center site is maintained by the County. The site offers 10 computer terminals with MS Office and broadband Internet access with black and white only printer availability. Currently limited training is available at the site. The project is intended to enhance the offerings at this site and expand the availability of computer labs across the County

Immediate required capacity includes up to 20 more computers, monitors, peripheral devices, black and white and colored printers with scanning capacity, networking components and software licenses to support the initial deployment. In addition, cost allocations will be required for paper, toner and other costs associated with maintenance of the labs.

Following the initial deployment, utilization will be analyzed and, based on needs, additional capacity will be allocated (e.g., adding more computers, where high utilization is evident). While it is impossible to precisely estimate future capacity needs, a reasonable estimate of 20 additional terminals has been made and is included as part of the attached budget narrative.

SCVHHS has a well defined Technology Standards policy that defines hardware and platform requirements. The Technology Standards policy is included in Appendix B of Exhibit 2.

Software Considerations

- Compatibility of computer languages with existing and planned activities.

The computers and other technology used in the Consumer Learning Centers will utilize Commercial Off the Shelf (COTS), such as, MS Office applications and anti-virus and spyware software that are already part of the MHD software standard portfolio. No incompatible software or other applications will be needed or part of the Consumer Learning Centers task rollout and implementation activities. Procurement of software and hardware will be secured through current vendor contracts.

The Technology Standards policy for software is included in Appendix B of Exhibit 2.

- Maintenance of the proposed software, e.g. vendor-supplied.

The Consumer Learning Centers initiative will utilize Commercially-Off-the-Shelf (COTS) components currently in use and supported by SCVHHS staff, such as, MS Office applications, anti-virus and spyware software that are already part of the MHD software standard portfolio. No incompatible software or other applications will be needed or part of the Consumer Learning Centers task rollout and implementation activities.

Procurement of software and hardware will be secured through current vendor contracts and will be upgraded and maintained by existing or future SCVHHS staff. Staff and consumers will have access to the SCVHHS Help Desk when necessary. Vendor support and licensing agreements will be applied to the Consumer Learning Center Project.

- Availability of complete documentation of software capabilities.

The Consumer Learning Center Project will use existing vendor provided documentation to assist end-users with computer and application usage.

Training materials will be developed as needed and onsite resources will be available to end-users to assist with questions and other software and application capability questions.

- Availability of necessary security features as defined in DMH standards noted in Appendix B.

While DMH standards for security apply to production IT systems, all applicable client computing requirements will be met or exceeded in the Consumer Learning Centers environment. The CLC will have access to the County Internet resource, but no access to transaction systems or other protected data.

Security for Consumer Learning Center hardware and software will consist of a matrixed approach including physical facility and equipment security (e.g., locks, etc.), software-based security (usernames/passwords), and onsite monitoring. In addition to these measures, virus scanning software and content management software will be used to protect against virus threats and restrict access to websites and other external locations that would contain offensive, threatening, or other restricted content.

Security features, including virus updates and content management filter maintenance will be managed by existing and future SCVHHS staff.

- Ability of the software to meet current technology standards or be modified to meet them in the future.

Consumer Learning Center hardware and software will be deployed using a 'standard build' and will be upgraded in accordance with the current existing and future upgrade cycle.

SCVHHS has a defined and mature set of current technology standards. These standards were designed with the goal of future growth and in anticipation of technological changes over time. Further, to support these standards, the County has established relationships with a number of vendors and has negotiated pricing and upgrade terms to reflect future growth and change.

The Technology Standards are defined in a County policy included in Appendix B of Exhibit 2.

Interagency Considerations

- Describe the County's interfaces with contract service providers and state and local agencies. Consideration must be given to compatibility of communications and sharing of data. The information technology needs of contract service providers must be considered in the local planning process.

This area is not relevant to the Consumer Learning Center project.

Training and Implementation

- Describe the current status of workflow and the proposed process for assessment, implementation and training of new technology being considered.

For the Consumer Learning Centers the process of implementation and training does not involve workflow analysis and process assessment. Training for consumers is a component of the project and included in the project plan.

The County benefits from the fact that implementation of some aspects of the envisioned Consumer Learning Centers have already been established in one consumer wellness site. The County has interviewed consumers and family members, as well as the paid consumer staff, and obtained important information on what consumers want and what works and does not work. The County will continue to work with consumers and their families as the implementation of Consumer Learning Centers are expanded.

- ❖ Implementation of the Consumer Learning Centers will require:
 - The expansion of the hardware, software and facility set-up to other sites is largely a matter of:
 - Facility assessment to determine appropriate Consumer Learning space availability
 - Assessment of cabling/network related requirements
 - Installation of desks, terminals, cabling
 - Installation of COTS software
 - Installation of printers, scanners and other ancillary hardware
 - Verification/testing of each terminal
 - Implementation of required security, user sign-on, access rules
 - Development of any procedures needed to manage the sites.
- ❖ Training for consumers will encompass the following:
 - Continuing discussion with consumers on their training needs
 - Development of appropriate training materials, video tutorials or other methods to provide training for consumers
 - Scheduling of training that aligns with consumer needs
 - Load of video tutorials to the web, if developed
 - Identification of long term updates and maintenance of training information and on-going training processes.

The training plan will be defined in the project plan.

Security Strategy

- Describe the County's policies and procedures related to Privacy and Security for the Project as they may differ from general Privacy and Security processes.

While we do not anticipate any policies and procedures related to Privacy and Security for the CLC hardware and software to differ from general Privacy and Security processes, all applicable requirements and regulations will be met or exceeded in the CLC environment.

Security for CLC hardware and software will consist of a matrixed approach including physical facility and equipment security (e.g., locks, etc.), software-based security (usernames/passwords), and onsite monitoring. In addition to these measures, virus scanning software and content management software will be used to protect against virus threats and restrict access to websites and other external locations that would contain offensive, threatening, or other restricted content.

Security features, including virus updates and content management filter maintenance will be managed by existing and future staff.

The SCVHHS IT Security policy in an abbreviated form is included in Appendix B of Exhibit 2.

- Protecting data security and privacy.

Data will not be stored on CLC devices but from time to time, CLC clients may transmit data subject to data security and privacy regulations.

To protect 'data in transit', encryption and/or other mechanisms currently utilized by existing and/or future applications being accessed in CLC facilities will be utilized. Because MHD is subject to a variety of data security and privacy regulations all MHD systems being accessed in CLC facilities will already have appropriate security mechanisms.

To ensure that no data is stored on CLC computers, a limited user profile will be created for CLC clients that will prohibit saving files. As an added measure, CLC computers will regularly be 'rebuilt' from a standard image to ensure a consistent and safe computing environment.

As referenced throughout this document, standard virus protection will be employed, systems will be subject to SCVHHS network monitoring, and content filters will be deployed to further minimize the risks of malicious software or user activities.

The SCVHHS IT Security policy in an abbreviated form is included in Appendix B of Exhibit 2.

- Operational Recovery Planning.

Recovery planning will consist of a complete 'rebuild' of any systems requiring recovery from a 'standard build' as determined in the planning process.

Aside from asset tracking activities (for replacement in the event of a disaster), no other recovery planning is envisioned for CLC hardware or software.

- **Business Continuity Planning.**

CLC systems are not a critical component in Business Continuity Planning (BCP) and, as such, are not anticipated to be a part of future BCP or tests. Exclusion of these systems from BCP is not projected to have a material impact on consumer care and/or provision of essential services and exclusion will conserve already scarce IS resources and capacity for more critical disaster recovery activities.

- **Emergency Response Planning.**

CLC systems are not a critical component in Emergency Response Planning (ERP) and, as such, are not anticipated to be a part of future BCP or tests. Exclusion of these systems from ERP is not projected to have a material impact on consumer care and/or provision of essential services and exclusion will conserve already scarce IS resources and capacity for more critical emergency response activities.

- **HIPAA Compliance.**

The access of Protected Health Information and other data in the CLC facilities will require MHD to ensure compliance with some aspects of the Health Insurance Portability and Accountability Act (HIPAA).

Further, we anticipate the HIPAA will be one of many sets of regulatory compliance that will require planning and operational practice over time. Where possible, the CLC facilities, systems, and other hardware and software will leverage existing security mechanisms employed by SCVHHS.

Compliance with HIPAA and other relevant security requirements will be evaluated on a yearly basis by County ISD as part of a larger annual HIPAA assessment conducted across MHD and referenced throughout the larger MHSa application and in other task areas.

- **State and Federal laws and regulations.**

In addition to HIPAA and DMH security requirements there will be a number of State and Federal laws and regulations that will require additional security mechanisms to be considered, implemented, and practiced. Where possible, the CLC facility systems and applications will leverage existing security mechanisms employed by other MHD or County systems. Ultimate responsibility for compliance with State and Federal laws and regulations will lie with the MHD CIO.

Compliance with State, Federal, and other relevant security requirements will be evaluated on a yearly basis by County ISD.

Project Sponsor(s)

Commitments

Sponsor(s) Name(s) and Title(s)

- Identify the Project Sponsor name and title. If multiple Sponsors, identify each separately.

Deane Wiley, Ph.D., SCVHHS Mental Health Department Learning Partnership Director

Commitment

- Describe each sponsor(s) commitment to the success of the Project, identifying resource and management commitment.

The Project Sponsor agrees to provide direction and leadership for this Project and will:

- Provide Executive leadership and bidirectional communication on the project
- Accepts visible departmental ownership for the project
- Set strategic direction and goals for projects
- Has final approval on all project deliverables
- Serves as the ultimate decision-maker on issues that cannot be resolved at a lower level
- Is accountable for the Project's success and will hold all team members responsible for their contributions and assignments to the project.

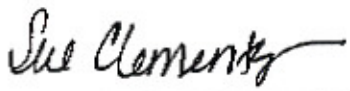
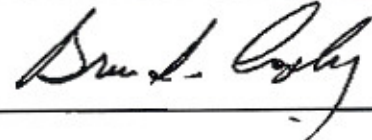

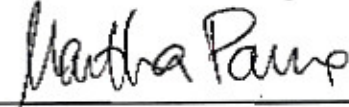
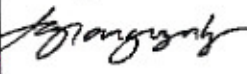

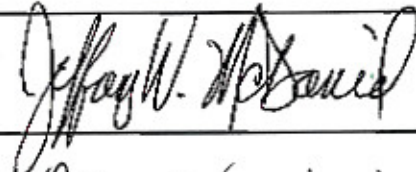

Approvals/Contacts

- Please include separate signoff sheet with the names, titles, phone, e-mail, signatures and dates for: Individual(s) responsible for preparation of this Exhibit, such as the Project Lead or Project Sponsor(s).

Approval / Contact sign-off sheet is attached.

MHSA Enclosure 3 - Project Approvals and Contacts

Signoff sheet with the names, titles, phone, e-mail, signatures and dates for individual(s) responsible for the preparation of this Exhibit

Name	Title	Email	Phone	Signature	Date
Sue Clements (Primary Contact)	SCVHHS MHSA Technological Needs Project Manager	Sue.Clements@hhs.sccgov.org	408-885-7082		5-11-09
Bruce Copley	SCVHHS MHD Deputy Director	Bruce.Copley@hhs.sccgov.org	408-885-5773		5-11-09
Deane Wiley, Ph.D.	SCVHHS MHD Learning Partnership Division Director	Deane.Wiley@hhs.sccgov.org	408-792-3901		5-11-09
Martha Paine	SCVHHS Director of General Fund Financial Services	Martha.Paine@hhs.sccgov.org	408-885-6860		5-11-09
Ky Le	SCVHHS MHD MHSA Project Manager	Ky.Le@hhs.sccgov.org	408-885-7543		5/11/09
Cheri Silveira	SCVHHS IS Manager	Cheri.Silveira@hhs.sccgov.org	408-885-6490		5/11/09
Jeff McDaniel	SCVHHS IS Project Leadership	Jeff.McDaniel@hhs.sccgov.org	408-885-4036		5/14/09
Diane Vrenios	Sr. Consultant Outlook Associates, LLC	DVrenios@outlook-associates.com	888-432-0261		5/15/09

APPENDIX A - PROJECT RISK ASSESSMENT

Consumer Learning Centers

Category	Factor	Rating	Score	
Estimated Cost of Project	Over \$5 million	6	2	
	Over \$ 3 million	4		
	Over \$500,000	2		
	Under \$500,000	1		
Project Manager Experience				
Like Projects completed in a "key staff" role	None	3	1	
	One	2		
	Two or more	1		
Team Experience				
Like Projects completed by at least 75% of Key Staff	None	3	2	
	One	2		
	Two or more	1		
Elements of Project Type				
Hardware	New Install	Local Desktop /Server	1	1
		Distributed/Enterprise Server	3	
	Update/Upgrade	Local Desktop /Server	1	1
		Distributed/Enterprise Server	2	
	Infrastructure	Local Network/Cabling	1	1
		Distributed Network	2	
Data Center/Network Operations Center		3		
Software	Custom Development -		5	1
	Application Service Provider		1	
	COTS* Installation	"Off-the-Shelf"	1	
		Modified COTS	3	2
	Number of Users	Over 1,000	5	
		Over 100	3	
		Over 20	2	
		Under 20	1	
	Architecture	Browser/thin client based	1	1
		Two- Tier (client / server	2	
Multi-tier (client & web, database, application, etc. servers)		3		
*Commercial Off The Shelf Software				

Total Score	12
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Total Score	Project Risk Rating
25 - 31	High
16 - 24	Medium
8 - 15	Low

CLC-Milestones-DRAFTv1

ID	Task Name	Duration	Start	Finish	Predecessors
1	Consumer Learning Centers	266 days	Mon 3/1/10	Mon 3/7/11	
2	1.0 Project Planning & Initiation	60 days	Mon 3/1/10	Fri 5/21/10	
3	Organize Project	44 days	Mon 3/1/10	Thu 4/29/10	
4	Create Project Charter	44 days	Mon 3/1/10	Thu 4/29/10	
5	Create Project Organization Plan	44 days	Mon 3/1/10	Thu 4/29/10	4SS
6	Develop staffing plan, determine job descriptions, etc.	44 days	Mon 3/1/10	Thu 4/29/10	5SS
7	Create Issue Management Plan	44 days	Mon 3/1/10	Thu 4/29/10	6SS
8	Create Risk Management Plan	44 days	Mon 3/1/10	Thu 4/29/10	7SS
9	Create Communication Plan	44 days	Mon 3/1/10	Thu 4/29/10	8SS
10	Complete project plan	44 days	Mon 3/1/10	Thu 4/29/10	9SS
11	Develop Project Budget	60 days	Mon 3/1/10	Fri 5/21/10	
12	Identify Projects	30 days	Mon 3/1/10	Fri 4/9/10	4SS
13	Prioritize Projects	30 days	Mon 3/1/10	Fri 4/9/10	12SS
14	Request MHSA IT Funds	10 days	Mon 4/12/10	Fri 4/23/10	13
15	Amend MHSA IT TN Plan	10 days	Mon 4/12/10	Fri 4/23/10	14SS
16	Finalize project budget	30 days	Mon 4/12/10	Fri 5/21/10	12
17	Convene Project Team(s) and Workgroups	15 days	Fri 4/30/10	Thu 5/20/10	
18	Identify Stakeholders	5 days	Fri 4/30/10	Thu 5/6/10	5
19	Establish governance structure and create project team	15 days	Fri 4/30/10	Thu 5/20/10	18SS
20	Conduct Project Kick-off Meeting	1 day	Fri 5/21/10	Fri 5/21/10	19
21	2.0: Requirements Definition	90 days	Mon 5/24/10	Fri 9/24/10	20
22	Gather Requirements and Analysis	90 days	Mon 5/24/10	Fri 9/24/10	
23	Identify Use Cases for PCs in Learning Center	90 days	Mon 5/24/10	Fri 9/24/10	
24	Catalog Use Cases	30 days	Mon 5/24/10	Fri 7/2/10	
25	Catalog Required Software	60 days	Mon 7/5/10	Fri 9/24/10	
26	Identify software required to support use cases	60 days	Mon 7/5/10	Fri 9/24/10	24
27	Catalog Required Hardware	30 days	Mon 7/5/10	Fri 8/13/10	
28	Identify hardware required to support use cases	30 days	Mon 7/5/10	Fri 8/13/10	26SS
29	Identify Operations Requirements	30 days	Mon 5/24/10	Fri 7/2/10	
30	Identify staffing requirements	30 days	Mon 5/24/10	Fri 7/2/10	
31	Identify hours of operation requirements	5 days	Mon 5/24/10	Fri 5/28/10	
32	Identify space and ergonomic requirements	30 days	Mon 5/24/10	Fri 7/2/10	
33	Identify Security Requirements	90 days	Mon 5/24/10	Fri 9/24/10	
34	Identify security and privacy requirements	90 days	Mon 5/24/10	Fri 9/24/10	
35	3.0 Design	45 days	Mon 9/27/10	Fri 11/26/10	21
36	Training	30 days	Mon 9/27/10	Fri 11/5/10	
37	Develop training materials for consumers, helpdesk, CLC staff, and system admin	30 days	Mon 9/27/10	Fri 11/5/10	
38	Design the training schedule and frequency plan for go-live and on-going	30 days	Mon 9/27/10	Fri 11/5/10	
39	Backup and Recovery	15 days	Mon 9/27/10	Fri 10/15/10	
40	Design backup and recovery plans	15 days	Mon 9/27/10	Fri 10/15/10	
41	Facility space	30 days	Mon 9/27/10	Fri 11/5/10	
42	Architectural and other space design	30 days	Mon 9/27/10	Fri 11/5/10	
43	Network	15 days	Mon 11/8/10	Fri 11/26/10	41
44	Design network infrastructure	15 days	Mon 11/8/10	Fri 11/26/10	
45	4.0 Implement	70 days	Mon 11/29/10	Fri 3/4/11	35
46	Procure Hardware	30 days	Mon 11/29/10	Fri 1/7/11	

CLC-Milestones-DRAFTv1

ID	Task Name	Duration	Start	Finish	Predecessors
47	Purchase required hardware	30 days	Mon 11/29/10	Fri 1/7/11	
48	Procure Software	30 days	Mon 11/29/10	Fri 1/7/11	
49	Purchase required software	30 days	Mon 11/29/10	Fri 1/7/11	47SS
50	Procure facility materials	30 days	Mon 11/29/10	Fri 1/7/11	
51	Purchase required facility items (desks, chairs, etc.)	30 days	Mon 11/29/10	Fri 1/7/11	47SS
52	Configure Hardware	15 days	Mon 1/10/11	Fri 1/28/11	
53	Configure PCs and other hardware for deployment	15 days	Mon 1/10/11	Fri 1/28/11	47
54	Configure Software	15 days	Mon 1/10/11	Fri 1/28/11	
55	Configure Operating Systems, applications, and other software for deployment	15 days	Mon 1/10/11	Fri 1/28/11	49
56	Configure CLC facilities	15 days	Mon 1/10/11	Fri 1/28/11	
57	Final setup for deployment of hardware	15 days	Mon 1/10/11	Fri 1/28/11	51
58	Deploy hardware	15 days	Mon 1/31/11	Fri 2/18/11	
59	Install PCs and other hardware in facility	15 days	Mon 1/31/11	Fri 2/18/11	57
60	Train Staff	10 days	Mon 2/21/11	Fri 3/4/11	
61	Conduct training for CLC staff and Help Desk	10 days	Mon 2/21/11	Fri 3/4/11	59
62	5.0 Testing	1 day	Mon 3/7/11	Mon 3/7/11	45
63	Perform onsite testing	1 day	Mon 3/7/11	Mon 3/7/11	
64	Test use cases developed in Phase 2	1 day	Mon 3/7/11	Mon 3/7/11	
65	6.0 Go Live	0 days	Mon 3/7/11	Mon 3/7/11	64
66	Open CLC facilities to consumers	0 days	Mon 3/7/11	Mon 3/7/11	
67	Repeat process as iteration for new sites -revise dates, as needed.	0 days	Mon 3/7/11	Mon 3/7/11	

Enclosure 3
Exhibit 4

Budget Summary

For Technological Needs Project Proposal

County Name: Santa Clara

Project Name:

Consumer Learning Centers

(List Dollars in Thousands)

Category	(1) 08/09	(2) 09/10	(3) 10/11	(4) Future Years	(5) Total One-time Costs (1+2+3+4)	(6) Estimated Annual Ongoing Costs*
Personnel		34	138		172	138
Total Staff (Salaries and Benefits)		34	138		138	138
Hardware		15	190		205	2
From Exhibit 2						
Total Hardware		15	190		205	2
Software		20	20		40	2
From Exhibit 2						
Total Software		20	20		40	2
Contract Services (list services to be provided)		50	50		100	0
NOTE: See below for description						
Total Contract Services		50	50		100	0
Administrative Overhead		15	15		30	2
Other Expenses (Describe)		13	12		25	1
NOTE: See below for description						
Total Costs (A)		147	425		572	145
Total Offsetting Revenues (B) **						
MHSA Funding Requirements (A-B)		147	425		572	145

* Annual Costs are the ongoing costs required to maintain the technology infrastructure after the one-time implementation.

** For Projects providing services to Multiple-Program Clients (e.g., Mental Health and Alcohol and Drug Program clients), Attach a Description of Estimated Benefits and Project Costs allocated to Each Program.

Notes:

Personnel costs include a Project Coordinator / Consumer Skills Coach and Consumer Peer Support staff to oversee the operations of the labs.

Contract Services will be utilized to set-up the labs, training materials, curriculum and documentation. Once established, existing staff will operate and maintain the labs.

Other expenses, as defined in this document, include an allowance for training, documentation, and expenses otherwise not categorized elsewhere.

**Enclosure 3
Exhibit 5**

**Stakeholder Participation
For Technological Needs Project Proposal**

County Name: Santa Clara

Project Name: Consumer Learning Centers

Counties are to provide a short summary of their Community Planning Process (for Projects), to include identifying stakeholder entities involved and the nature of the planning process; for example, description of the use of focus groups, planning meetings, teleconferences, electronic communication, and/or use of regional partnerships.

Stakeholder Type (e.g. Contract Provider, Client, Family Member, Clinician)	Meeting Type (e.g. Public Teleconferences)	Meeting Date
MHSA IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	4/08/2008
MHSA IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	6/10/2008
MH Staff / Mangers	Comprehensive, structured interviews with IT staff to discuss structure, vision, priorities and needs.	6/17/2008
All County and Contractor CFTN Stakeholders	Kick-Off meeting and Presentation of IT Assessment Plan by Outlook Associates	6/18/2008
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSA governing body (SLC)	6/20/2008
MH Staff/Managers/Clinicians	Comprehensive, structured interviews with staff/managers and clinicians from various service areas. Interviews included: Adult Services, Clerical, Older Adult Services, Eligibility and Benefits, Unicare Coordination.	7/08/2008
MHSA IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	7/8/2008
MH Staff/Managers/Clinicians	Comprehensive, structured interviews with Learning Partnership/Decision Support, Contracted providers, General Planning regarding MHSA and Housing needs and a Mental Health Clinic.	7/09/2008

Stakeholder Type (e.g. Contract Provider, Client, Family Member, Clinician)	Meeting Type (e.g. Public Teleconferences)	Meeting Date
Staff/Managers/Clinicians/Other Agencies	Comprehensive, structured interviews with a Mental Health Clinic and another supporting agency - SSA.	7/15/2008
Staff/Managers/Clinicians/Other Agencies	Comprehensive, structured interviews with Finance, Billing and Claims, MHSA Programs, Quality Improvement and Drug and Alcohol Services (DADS).	7/16/2008
Staff/Managers/Clinicians/Contracted Provider Billing Service and Consumers and Families	Comprehensive, structured interviews with contracted provider business solution (ABS), Managed Care Program and Consumer and Family interview at a County sponsored Peer Support Program.	7/17/2008
Staff/Managers/Contracted Providers Group/Clinicians	Comprehensive, structured interviews with Contracted Providers, Contract Services, Clinical, Physician and Pharmacy Services.	7/18/2008
MH Executives/Clinicians	Discussion on vision and contractor strategy.	07/21/2008
Staff/Managers/Contracted Provider	Comprehensive, structured conference call interview regarding the Call Center, Claims and Authorization services and Contracted provider (e.g.Symed).	7/24/2008
Consumer Advocate	Telephone conference call with NAMI representative.	7/28/2008
MHSA IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	8/12/2008
Staff/Managers/Consumer Affairs/Clinicians	Comprehensive, structure interviews with Consumer Affairs, Custody and Court Services and Family and Children Services.	8/13/2008
Staff/Managers/Other Agencies	Comprehensive, structured interviews with the Public Guardian agency, Decision Support and MH IT.	8/14/2008
Country Interdepartmental Stakeholders	Capital Facilities and Technology Needs Steering Committee (Became CFTN Leadership Committee)	8/15/2008
MH and IT Management and Core Team	Presentation Mental Health Services Act CFTN Component IT Visions and Project List	9/9/2008
MH and IT Management and Core	Presentation of assessment of "Current State of	9/18/2008

Stakeholder Type (e.g. Contract Provider, Client, Family Member, Clinician)	Meeting Type (e.g. Public Teleconferences)	Meeting Date
Team	SCC County Mental IT" by Outlook Associates	
MHSА IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	9/23/2008
Consumers & Family	Consumer Focus Groups	9/26/2008
Contract Service Providers	Technology Needs Town Hall Meeting	9/26/2008
MHSА Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSА governing body (SLC)	9/26/2008
MHSА IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	10/14/2008
MHSА Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSА governing body (SLC)	10/17/2008
Ethnic Communities (ECCAC) Task Force	MHSА CFTN presentation and receiving input from ethnic group representatives on MHSА CFTN	10/22/2008
Older Adults Services Focus Group	Presentation and receiving input from Older Adults Committee representative on MHSА CFTN	10/28/2008
CFTN Leadership Committee	Mental Health Managers and Contractor Leadership group to review combined Capital, Facilities and Technology Needs plans prior to submitting to SLC	11/13/2008
MHSА IT Fund Planning Meeting	Multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do initial CFTN Needs Assessment Planning	11/14/2008
MHSА IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	11/14/2008
MHSА Stakeholder and Leadership Committee Meeting (SLC)	CFTN Component Proposal Approval by overall MHSА governing body (SLC)	11/17/2008
Special session for Mental Health, IS and Contractor key stakeholders.	Californian Behavioral Health IT System Market Analysis by Outlook Associates	11/24/2008
Health And Hospital Committee (HHC) of Board of Supervisors	Status Report on Mental Health Services Act (Proposition 63) Component Proposals	12/10/2008

Stakeholder Type (e.g. Contract Provider, Client, Family Member, Clinician)	Meeting Type (e.g. Public Teleconferences)	Meeting Date
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSA governing body (SLC)	12/19/2008
Public Hearing on CFTN Component Proposal	Mental Health Board (Reports to Board of Supervisors)	1/6/2009
MH and IT Management and Core Team	Presentation by Outlook Associates of "Gap Analysis and Future State of IT for SCC Mental Health"	1/7/2009
MHSA IT Fund Planning Meeting for Administrative, Technology and Clinical Stakeholders	Original multidisciplinary Committee of MH Staff, IT staff and contractor IT staff to do CFTN Needs Assessment Planning	1/13/2009
Mental Health Internal Clinical Stakeholder event	View the Clinical Features and Functions of Pro-Fler EHR product from Unicare	1/14/2009
Mental Health and IT staff Site Visit to Kern County	Visited Kern County Mental Health System of Care to learn about their EHR implementation experience.	1/21/2009
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSA governing body	1/23/2009
Mental Health Dept. Ops Meeting	MHSA Technical Needs Strategy and Decision Making	2/4/2009
Town Hall Meeting for north Santa Clara County residents	Open Session for all stakeholders during Public Comment Period on CFTN Project Proposal	2/11/2009
Mental Health and IS Internal Stakeholder Review	Presentation of Proposal for Enterprise Data Warehouse Project (Enclosure 3)	2/12/2009
Town Hall Meeting – for central Santa Clara County residents	Open Session for all stakeholders during Public Comment Period on CFTN Project Proposal	2/12/2009
MH Executives / Clinicians / IS staff	Presentation, discussion & review of project.	2/13/2009
Mental Health and IS Internal Stakeholder Review	Presentation of Proposal for Electronic Health Record System Project (Enclosure 3)	2/13/2009
Town Hall Meeting – for south Santa Clara County residents	Open Session for all stakeholders during Public Comment Period on CFTN Project Proposal	2/14/2009
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSA governing body (SLC)	2/20/2009

Stakeholder Type (e.g. Contract Provider, Client, Family Member, Clinician)	Meeting Type (e.g. Public Teleconferences)	Meeting Date
Users Group Meeting attended by MH and IT staff	Guests at California AVATAR Spring 2009 User Group Meeting to learn about EHR product functions and features	3/3/2009
MHSA Comparison Study of EHR products	Special session of MHSA Coordination Meeting	3/9/2009
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Official update on CFTN activities to overall MHSA governing body (SLC)	3/20/2009
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Technology Needs Project Proposal Approval by overall MHSA governing body (SLC)	4/17/2009
Contract Service Providers Stakeholders	Special Session to discuss Contractor Strategy for use of EHR system use by Contract Agencies	5/14/2009
Public Hearing on CFTN Enclosure 3 Project Proposals	Mental Health Board (Reports to Board of Supervisors)	5/18/2009
MHSA Stakeholder and Leadership Committee Meeting (SLC)	Technology Needs Project Proposal Budget Approval by overall MHSA governing body (SLC)	5/21/2009