

Deputy Ministers' Committee on Transformation and Technology

Integrated Case Management (ICM) Update

*ICM – A partnership between the Ministries of Social Development & Social Innovation, Children and Family Development and
Technology, Innovation & Citizens' Services*

Background

- The Ministries of Social Development and Social Innovation, and Children and Family Development spend \$3.8 billion annually on key social programs, such as income assistance, employment, child welfare, child care, and services for children with special needs.
- More than 200,000 individuals and families access these services every year.
- These services are delivered by approx. 4,000 front-line workers and more than 12,000 contracted service providers (including foster parents) and delegated aboriginal agencies.

Background

- Pre-planning started in 2006.
- Siebel software procured in 2008 through year long process. Deloitte selected as Systems Integrator in 2009.
- ICM project commenced in January 2010 and targeted to complete by end of 2014.
- A 5 year transformational project to provide better tools and information to support staff in providing services to their clients.
- Project in final phase, on track, on budget and moving towards completion.
 - *Phase 1 implemented November, 2010 (SDSI 1500 users, MCFD 300 users)*
 - *Phase 2 implemented April, 2012 (SDSI 4500 users, MCFD 4100 users)*
 - *Phase 3 implemented March, 2013*
 - *Phase 4, the final phase, is currently underway*

Current Status

- ICM currently supports:

SDSI (almost all programs)

Income Assistance
Employment Program of BC
Bus Pass Program
Senior's Supplement

MCFD

Child Welfare
Children & Youth Special Needs
Child Care Subsidy
Medical Benefits
Autism Funding

- eligibility determination (*rules built into system rather than relying on policy manuals*)
- electronic document management (*allows access to information independent of geography*)
- ongoing case management
- reporting
- streamlined administration for service providers
- ~8600 users (*staff, service providers, delegated aboriginal agencies*)

Current Status

- Overall, the project has met expectations in SDSI and the transactional areas of MCFD, and remained within its budget and timelines.
- Issues in Child Welfare have significantly over-shadowed the project.
- Phases 4 and 5 consolidated into a single final phase.
- Final phase - adjusted scope to stay within capital budget and address Child Welfare as highest priority.

Project Approach

What worked well:

- MTICS lead for planning, procurement and champion for corporate solution (“broker” role with two ministries), ongoing involvement
- extensive upfront planning, detailed business case
- approval at outset - full capital budget of \$182m over 5 phases with firm dates
- phasing provided flexibility to adjust scope based on business priorities
- separate procurements (*software first, then systems integrator*)

Challenges:

- aggressive schedule – capacity for ministries’ to participate while maintaining service delivery
- maintaining momentum / continuity over long term project.
- unpredictability of the Child Welfare context

Governance

What worked well:

- strong executive sponsorship / commitment – Project Board
- executive commitment from vendors (Deloitte, Oracle)
- governance change for implementation: single business ministry accountable for overall implementation
- positioning ICM as a business project
- principles / desired practice shifts established at outset

Challenges:

- leadership changes
- SDSI and MCFD at different levels of readiness / awareness of what was required for success
- defining a common solution for different programs and culture
- gaps in expertise / familiarity with large project methodologies

Project Management

What worked well:

- good planning, strong execution
- established separate project management office
- vendor's methodology and project management best practices
- rigorous deliverable acceptance and change request processes
- weekly status reporting, monitoring of issues/risks
- strong team and clear accountabilities of roles/responsibilities on project team
- continuity of resources – long term commitment

Challenges:

- administration of project documentation
- planning for permanent support organization

Contract Structure

What worked well:

- overall contract, with analysis/design and build/implement contracts at each phase
 - manageable phases to reduce overall delivery risk
 - each phase is negotiated and inserts market discipline – transparency into resource and effort estimates
 - Systems integrator is motivated to continue to deliver with the prospect of future work
 - remedies in place to prevent the removal of key resources
 - support contract fixed price with service levels, warranties
 - project can cancel anytime, contract has ‘off ramps’ and change process in order to give the Province options throughout the project and ensure that market discipline continues to apply

Challenges:

- workload associated with repeated contract negotiations
- maintaining necessary internal expertise for contract negotiations/management

Budget

What worked well:

- full capital budget at outset (required TB request to access by phase)
- project contingencies built into each phase

Challenges:

s.13, s.17

s.17

Technology

What worked well:

- use of commercial off the shelf software
- strong vendor / partner relationships
- strong support/relationship with SSBC (dedicated on-site resource)
- significant upfront technical planning

Challenges:

- configuration vs customization of commercial product
- timing / commitment with software vendor's patches / upgrades
- timing / integration with other corporate initiatives
- unanticipated infrastructure and software costs
- systems performance / usability
- corporate solution is functional but not optimal for non transactional business areas

Business Readiness

What worked well:

- SDSI
 - business re-design preceded technology implementation (detail to business process level)
 - strong, visible executive support throughout
 - organizational culture aligned with typical change management approaches
 - long term resources committed to project (i.e. subject matter experts)
 - multi-level change leadership and active management of staff and service providers
- MCFD
 - narrowing scope to align with business readiness
 - taking time to confirm desired practice model
 - assignment of business ADM to lead implementation

Business Readiness

Challenges:

- pace of project – decision-making in program areas
- translation of strategic vision to system design (keeping ahead of implementation)
- ability to bring staff along with the changes understood by the core project team
- risk of core team perceived as not connected to front line as time passes
- MCFD
 - practice model undergoing major change while ICM was being designed
 - significant turnover at leadership level – level of involvement inconsistent
 - capacity to take on concurrent changes
 - translation of project methodology and software terminology

Change Management / Training

What went well:

- full-time change management leads in each ministry, dedicated work stream
- decentralized network of change champions / super users
- change readiness assessments / leadership action plans
- multiple training delivery modes - mobile training labs
- post-implementation refresher training and user supports

Challenges:

- ensuring consistent application of change leadership
- scheduling staff for training / impact on front line
- SDSI
 - readiness of employment service providers to deliver training
 - more face-to-face required
- MCFD
 - integration of practice and systems training
 - amount, style of training and audience (face-to-face required)
 - level of comfort with technology in general

Privacy

What worked well:

- dedicated Privacy Lead on project
- MTICS/OIPC – early and regular consultation
- Privacy Impact Assessments made public

Challenges:

- ability to achieve desired information sharing between ministries
- public perception

Overall

- large, complex project – must lead with the business
- strong governance – flexibility to adapt to changing needs / dynamics
- strong vendor / partner relationships
- strong change management leadership
- significant investment in training
- commitment of resources - subject matter experts etc.
- clear business vision and desired outcomes before defining technology solution

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