

# Integrated Case Management (ICM) Overview

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# Agenda

- BC Context
- Project background
- Vision and objectives
- Project overview
- Questions and contact information

## Social Sector Context

### Who we serve:

- People who are homeless
- People who are unemployed
- Persons with disabilities
- People with special needs
- People with mental-health challenges
- People suffering from substance addiction
- Children in need of protection (MCFD \*)
- Foster and adopted children (MCFD)

### The services we provide:

- Income Assistance
- Employment Program of BC
- Bus Pass and Seniors Supplement
- Family Maintenance
- Child Protection and Family Development (MCFD)
- Adoption and Foster Care (MCFD)
- Early Childhood Development and Child Care (MCFD)
- Child and Youth Mental Health Services (MCFD)
- Youth Justice and Youth Services (MCFD)
- Services for Children and Youth with Special Needs (MCFD)

\* Ministry of Children and Family Development

## Context

- The Ministries of Social Development & Social Innovation and Children and Family Development spend \$3.8 billion annually on key social programs such as child welfare, child care, services for children with special needs, income assistance, and employment programs.
- These services are delivered by 4,000 front line workers and over 12,000 contracted service providers (including foster parents) and Delegated Aboriginal Agencies with a combined total of over 25,000 employees. More than 200,000 individuals and families access these services every year.
- The goal of the ICM system is to replace outdated and inflexible information systems used to deliver these critical social programs.

## Why did we undertake ICM?

### Client Perspective

- Clients have to give the same information multiple times
- Clients may not be receiving the services that are most appropriate for them
- Service delivery was based on Ministry specific programs and services rather than being focused on individual needs
- Clients want more choice about how, when, and where they can access services

### Worker Perspective

- Staff spend too much of their time on administrative activities rather than on direct service delivery
- Staff do not have access to all the appropriate information they need about the client
- Approximately 50 systems used to carry out work
- Staff can take up to a year to fully learn existing systems
- A new generation of workers expect modern tools to do their job

## Background

### The Integrated Case Management Project is ...

- A partnership between three ministries – *Social Development & Social Innovation, Children & Family Development, and Technology, Innovation & Citizens' Services*
- A five-year business/information technology transformation project to provide better tools and information to support staff in providing services to their clients
- Key priority for government - ICM responds to the repeated calls over the years to improve information sharing across government to ensure that vulnerable citizens don't fall through the cracks

## 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
- 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*

## Vision and Key Objectives

The *right information to the right people at the right time*, in a secure manner that *protects privacy*, to *improve outcomes for citizens* through the *cohesive delivery of social services*.

- **Better Outcomes for Citizens** – *through improved access to effective services and coordinated planning*
- **Business Transformation** – *provide the technology required to meet the Ministries' business requirements, innovation and the future workplace*
- **Service Integration** – *provide integrated service delivery between programs and with contracted service providers*
- **Tools for Staff** – *provide better tools and simplified business processes to enable staff to spend more time in direct delivery of services to clients*
- **Appropriate Information Sharing** – *appropriate information sharing with all levels of government to provide better integration of services; client access to their own data*
- **Privacy protection** – *improve information controls, consistent application of policy and better security to enhance the privacy of personal data*



## Project Principles

- Is individual citizen centered
- Is a user-friendly tool that helps staff & service providers to better serve BC citizens in a secure environment
- Uses standard processes to improve individual outcomes for citizens
- Is independent of organizational structure
- Embodies the “to be” vision of social sector service delivery
- Facilitates and optimizes appropriate information sharing within the boundaries of privacy requirements
- Provides for evidenced-informed decision making at all levels
- Provides the user at the earliest opportunity with essential and critical information about the citizen
- Contains no customization (configure, don't customize) – focuses on key requirements (not one-off exceptions, and minimal legacy data migration)
- Requires no re-input of information – enter once, use multiple times

# Project Approach

## What worked well:

- Extensive upfront planning, detailed business case
- Approval at outset - full capital budget 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 participation while maintaining service delivery
- Maintaining momentum / continuity over long term project

# Governance

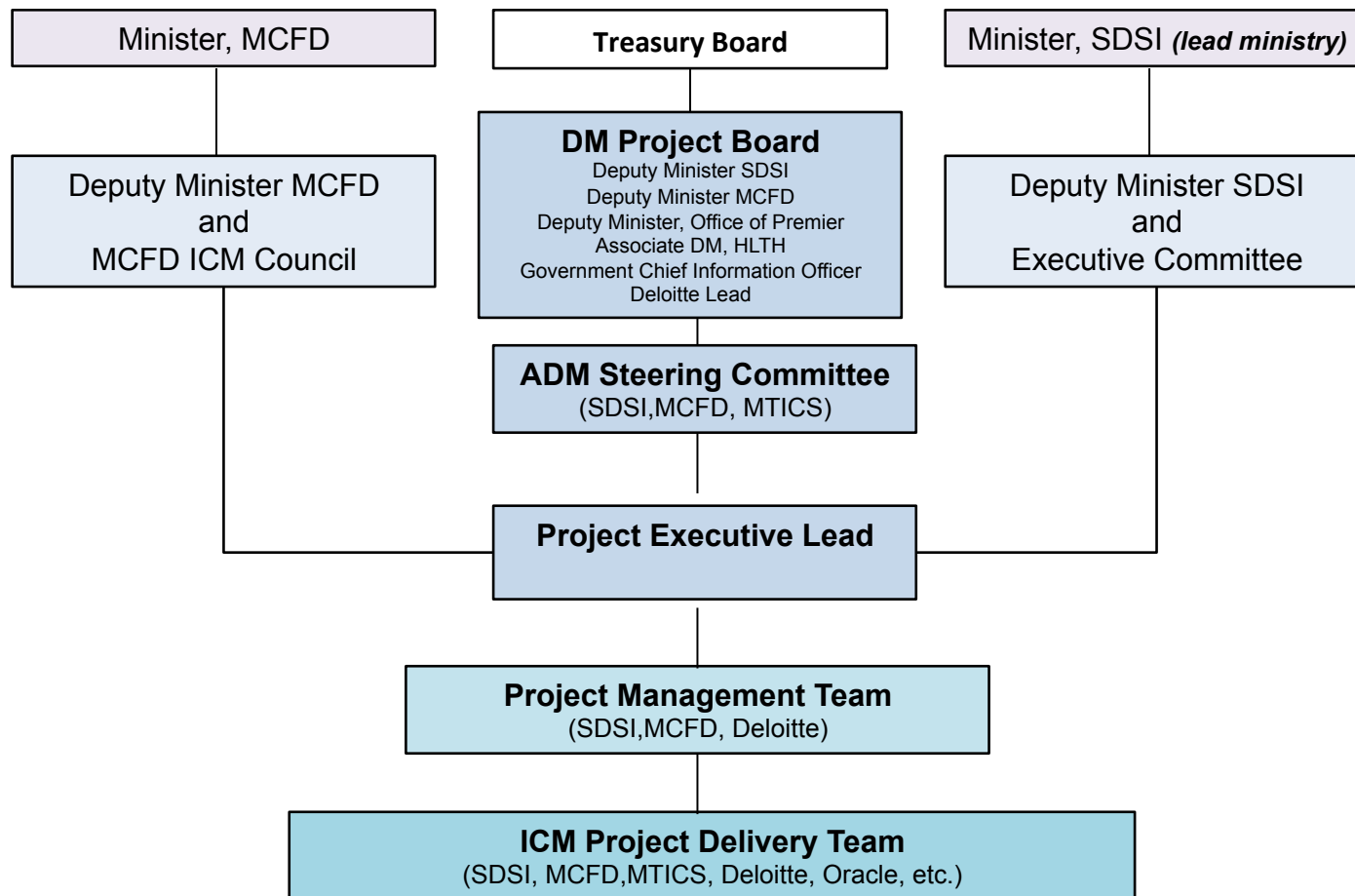
## What worked well:

- Strong Executive sponsorship / commitment
- Positioning ICM as a business project
- Principles / desired practice shifts established at outset

## Challenges:

- 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

# Governance



## 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
- Remedies in place to prevent the removal of key resources
- Support contract fixed price with service levels, warranties
- Contract has ‘off ramps’ and change process in order to give the Province options

### Challenges:

- Workload associated with repeated contract negotiations
- Maintaining necessary internal expertise for contract negotiations/management

# Project Management

## What worked well:

- 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

## Challenges:

- Administration of project documentation
- Planning for permanent support organization

# Privacy

## **What worked well:**

- Dedicated Privacy Lead on project
- Early and regular consultation with Privacy Commissioner's office
- Privacy Impact Assessments made public

## **Challenges:**

- Ability to achieve desired information sharing between ministries
- Public perception

# Technology

## What worked well:

- Use of commercial off the shelf software
- Strong vendor / partner relationships
- 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



## Business Readiness

### What worked well:

- 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

### Challenges:

- Pace of project – decision-making in program areas
- 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

# 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
- Level of comfort with technology in general

## Current Status

ICM currently supports:

- 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*)

Programs:

### **SDSI**

BC Employment & 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

## Summary – What's Needed

- 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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