Ministry of Community and Social
Services

Ministère des Services
Sociaux et Communautaires

**Children, Youth and Social
Services I&IT Cluster**

**Social Services Solutions
Modernization**
5255 Yonge Street, 5th Floor
Toronto, ON M2N 6P4
Telephone: 416-212-2500
Fax: 416-212-2501

**Social Policy Development
Division**

Ontario Works Branch
880 Bay St., 4th Floor, Rm 434
Toronto, Ontario, M7A 2B6
Tel (416) 326-8205
Fax (416) 326-9777

February 19, 2010

Memorandum To: Ontario Works Administrators
　　　　　　　　　　　-   Municipalities and DSSABs

From: Antonietta DiNiro
　　　　　Project Director, Business
　　　　　Social Services Solutions Modernization

　　　　　Erin Hannah
　　　　　Director, Ontario Works

RE: **Social Services Solutions Modernization Project
　　　　(SSSMP): Municipal Resources**

As you are aware, the ministry is proceeding with a multi-year project to modernize the Service Delivery Model Technology (SDMT). On January 22, 2010, the ministry announced the selection of Cúram Software – a commercial-off-the-shelf (COTS) solution that meets the approved government standard for case management products.

Over the next few months, we will be working collaboratively on the development of the overall project plan, identification of business policy and technical requirements and definition of high-level design.

Currently, the ministry is recruiting staff for the SSSMP team who have in-depth knowledge of social assistance programs, policies, business processes and technology systems. Our recruitment plan includes the participation of municipal staff to provide regional perspectives and expertise to the project.

At our last Director-Administrator Reference Group (DARG) meeting, members were provided with an overview of the project and the municipal-resources framework which included a summary of the resource positions and initial thoughts on how municipal staff might be identified for participation in the project**.** Attached is the slide deck that was presented to DARG members on January 21, 2010.

Two streams for recruitment have been identified:
1. Six municipal resources to support the Business Team
2. Ten municipal resources to serve as Local Change and Implementation Co-ordinators.

Please note, the purpose of this communication is for the recruitment of six municipal resources for the Business Team. This team will be responsible for activities such as business requirements, business rules, business processes etc. In addition to the six resources for immediate consideration, we will establish a pool we may draw from as required through the life of the project.

We will be seeking your assistance to recruit staff for the change management positions at a later date, as these positions will not start until September 2010.

Interested individuals for the business positions should be aware of the following:
- Start date is April 2010
- Duration of the project is three years
- Project team will be located at 5700 Yonge Street, North York, Ontario, M2M 4K2
- Six positions at the APA 19 level ($66,589 - $85,066) *note individuals included as part of the "pool" for future consideration are also at the APA 19 level.

Please refer to the attached slide presentation which details the specific qualifications required for these positions.

Given the current fiscal environment, we are unable to provide additional funding to cover moving costs of staff to the GTA. We recognize that this will be a significant factor in determining whether potential candidates will be interested in joining the project team. The arrangements of each successful candidate will be assessed on a case by case basis, and where it is determined that commuting or temporary living arrangements are practical and economical, the ministry **may** reimburse reasonable costs associated with these arrangements in accordance with corporate policies, directives and guidelines**,** up to a pre-determined amount. Further information will follow under separate cover.

The ministry is committed to providing additional opportunities for our delivery partners to provide input throughout the design and implementation of the new solution. This will include the participation of municipal staff in key working groups that will be convened to support the project.

At this time, we require your assistance in providing your DARG representative with the names of staff who are interested and qualified to work on this exciting project. Your DARG representative will be contacting you in the near future to discuss a locally agreed upon process for identifying and recommending candidates to the ministry. DARG members will be responsible for submitting the names of these candidates to the ministry, after which the ministry will create a short list of candidates that will be contacted for interviews. Please note the ministry is targeting to have project team members identified by mid March 2010.

Once again, thank you for your continued support and commitment as we move forward with this exciting project.

Original signed by   *Original signed by*

Antonietta DiNiro   Erin Hannah

Attachments (1)

c.   Director-Administrator Reference Group (DARG) Members
        Maxine Daley, Director, Social Assistance and Municipal Operations Branch
        Norm Helfand, Director, Ontario Disability Support Program Branch
        Renee Laforet, Project Director, Technical, Social Services Solutions
        Modernization
        Regional Directors

Social Services Solutions Modernization Project

Presentation to

Director Administrator Reference Group

January 21, 2010

Purpose

- To provide an overview of the Social Services Solutions Modernization Project
    - Context
    - Implementation Approach
    - Project Plan
    - Resources – Roles and Responsibilities

- To discuss next steps

Context

- The goal of the Social Services Solutions Modernization Project (SSSMP) is to replace the existing technology and related business processes for social assistance with a Commercial Off-the-Shelf (COTS) solution.

- COTS is a commercially available specialized software designed for specific functions, such as case management, that can be configured to meet an organization's unique business and technology needs.

- In 2008, the Ontario government established a case management business model to promote standard client service delivery, and improved coordination and continuity of service to meet the needs of clients who access government services. The *OPS Case Management Reference Model* follows the life cycle of a client from first point of contact, assessment of need, identification of service, delivery of service, and completion of case.

- To support the *OPS Case Management Reference Model,* the government executed enterprise-wide agreements for COTS solutions in 2009.

- As a standard, COTS solutions must typically allow for the following:
  - Incorporate rules for eligibility assessment;
  - Provide integrated service delivery;
  - Manage case information; and,
  - Create plans and goals related to meeting the desired outcome of the clients with a mechanism to monitor and evaluate planned outcomes.
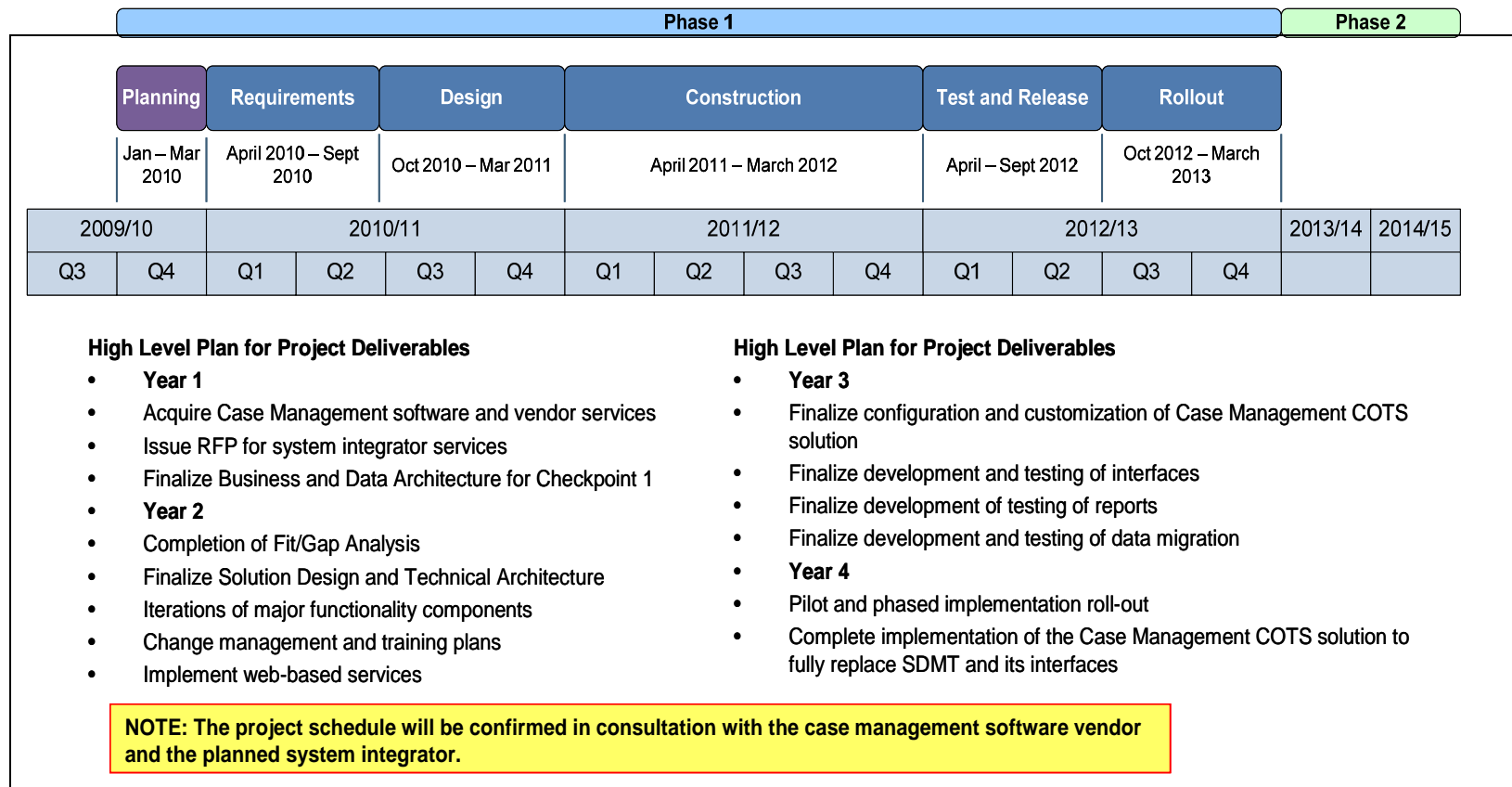
Context (cont)

- Replacing the Service Delivery Model Technology (SDMT) with a COTS solution will allow us to:
  - Simplify business processes and provide self service channels to benefit clients
  - More quickly and easily implement changes in accordance with ministry/government priorities
  - Improve service delivery and customer service
  - Improve case file processing
  - Reduce the need to utilize parallel systems
  - Enhance administrative and operational efficiency through a flexible technology that responds to caseload and operational trends
  - Provide the opportunity to further enhance service quality, program integrity and accountability

Implementation Approach

- SSSMP will be completed in two phases. **At this point, the ministry has approval to proceed with phase 1 only**.

- Phase 1 will include the implementation of a standard COTS solution which will enable the prioritized business function areas, such as case management, financial management, relationship management, and basic document management and scheduling.

- In addition, as part of Phase 1 the SSSM Project will explore the possibility of providing early functionality and benefits (e.g., web based services)

- At the completion of Phase 1, the Ministry will have implemented a self-sustaining solution which includes the complete replacement of SDMT functionality.

- Phase 2 is pending government approval. If approved, it could include:
  - additional social service/social assistance function areas
  - modernization of other peripheral legacy systems
  - implementation of Information Management processes and solutions

Project Plan Phase 1

- The following diagram summarizes the high level plan for Phase 1 of the SSSM Project.

			Phase 1			Phase 2
Planning	**Requirements**	**Design**	**Construction**	**Test and Release**	**Rollout**	
Jan – Mar 2010	April 2010 – Sept 2010	Oct 2010 – Mar 2011	April 2011 – March 2012	April – Sept 2012	Oct 2012 – March 2013	

2009/10		2010/11				2011/12				2012/13				2013/14	2014/15
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		

High Level Plan for Project Deliverables

- **Year 1**
- Acquire Case Management software and vendor services
- Issue RFP for system integrator services
- Finalize Business and Data Architecture for Checkpoint 1
- **Year 2**
- Completion of Fit/Gap Analysis
- Finalize Solution Design and Technical Architecture
- Iterations of major functionality components
- Change management and training plans
- Implement web-based services

High Level Plan for Project Deliverables

- **Year 3**
- Finalize configuration and customization of Case Management COTS solution
- Finalize development and testing of interfaces
- Finalize development of testing of reports
- Finalize development and testing of data migration
- **Year 4**
- Pilot and phased implementation roll-out
- Complete implementation of the Case Management COTS solution to fully replace SDMT and its interfaces

NOTE: The project schedule will be confirmed in consultation with the case management software vendor and the planned system integrator.

Seconded Project Staff

- A key component to the success of this initiative is to ensure that the project team is staffed with representatives who demonstrate an in-depth knowledge of social assistance programs, policies, business processes and technology systems.

- Project approval includes funding to enable municipal staff to participate on the project for a specific duration of time. This funding includes the costs associated with the secondments including salary and wage dollars.

- Municipal secondees will be responsible for work relating to two key components of the project - **business** and **change management** activities. Overall, the incumbents require:
    - strong: policy, analytical, financial and research skills; innovation, problem-solving, negotiation and consultation skills
    - presentation, communication and writing skills
    - planning and project management skills
    - ability to work both independently and as part of a highly functioning team
    - good understanding of implementation and communications issues and strategies
    - independent judgment in the coordination and development of products, dealing with ministry staff, other line ministries, and external stakeholders on sensitive matters
    - an awareness of the sensitive and confidential nature of the material with which he/she works.

Business Team – Roles and Responsibilities

- Under the direction of the Senior Business Manager and/or the Application Business Lead, the project requires 6 external secondees at 19APA level (program/policy analyst) to support business activities including business requirements, business rule simplification, business process, application configuration, business process design, user acceptance testing, business continuity planning and program performance management.
    - Undertake business process impact analysis and opportunity assessment
    - Analyze and validate requirements for changes to, and design of new business processes
    - Conduct usability analysis and design
    - Work with stakeholders to understand requirements and features for the new solution
    - Develop new and revised business processes flows and related information for incorporation into training and change management activities
    - Undertake business process testing
    - Conduct research and provide general support to team
    - Assist in business process testing
    - Analyze and validate impacts to existing policy resulting from system and business process changes

- Secondees will be co-located with the project team in the Greater Toronto Area.

- The start date for these positions is April 2010.

Change Management- Roles and Responsibilities

- Under the direction of the Manager, Change Management and the Regional Change Lead, the project requires 10 external municipal secondees at 17APA level (program /policy analyst) as Local Change and Implementation Co-ordinators to support change management activities including communications, training transition/roll-out, and post implementation support.

  - Communicate and deliver change at the local level
  - Liaise with Change Management Team to identify, document and understand change impacts and risks to Ontario Works business and solution users
  - Deliver ongoing implementation activities and communications that are regional in scope
  - In cooperation with Regional Change Lead coordinate the implementation of business process changes at the local office level
  - Provide input to the development of communications and training content that address regional change needs
  - Act as the link between service delivery agents and the project

- Municipal secondees will work from local sites and will be required to travel to the Greater Toronto Area for meetings.

- Start date is September 2010.

Project Staff Recruitment

- We need your assistance to recommend staff who would be a good fit and are interested in working on the project team **business** and **change management** activities.

- Please submit the names of recommended staff for both the business and change management activities to Netta DiNiro at Antonietta.DiNiro@ontario.ca by February 25, 2010. We expect to have the project team members identified by March, 2010.

- Please note that activities related to the business stream will begin in April 2010 and change management activities will begin in September 2010.

Next Steps

- Establish core project team including field secondees by April 2010.

- In the coming months the Ministry proposes to engage the Case Management vendor and Fee-for-Service consultants with expertise in implementing the Case Management product to assist in confirming the preliminary scoping vision and building a detailed implementation plan.

- In parallel with detailed implementation planning activities, a Request for Proposal (RFP) will be prepared in order to expedite procurement of a Systems Integrator (SI). The SI will be engaged to support data conversion, change management, training, and implementation.

- A small core team of business and IT staff will work with the Case Management vendor, SI and the Architecture Team to further refine business and functional requirements.

Appendix 1 – Functional Diagram

- The following diagram depicts the functional work stream structure for the SSSM Project: