

# Human Services: A Rapidly Changing World

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**ISM**

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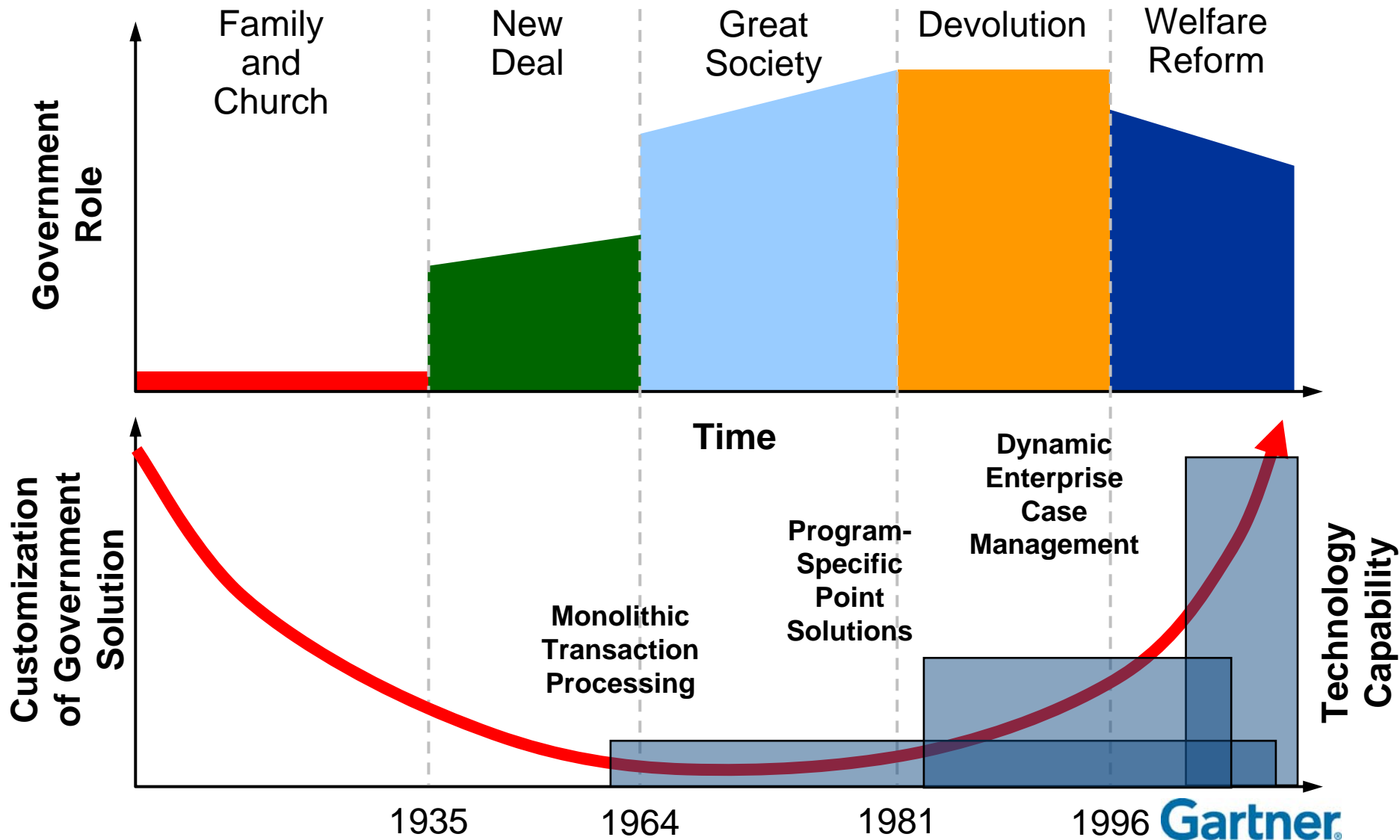
IT Solutions Management for Human Services

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an affiliate of the American Public Human Services Association

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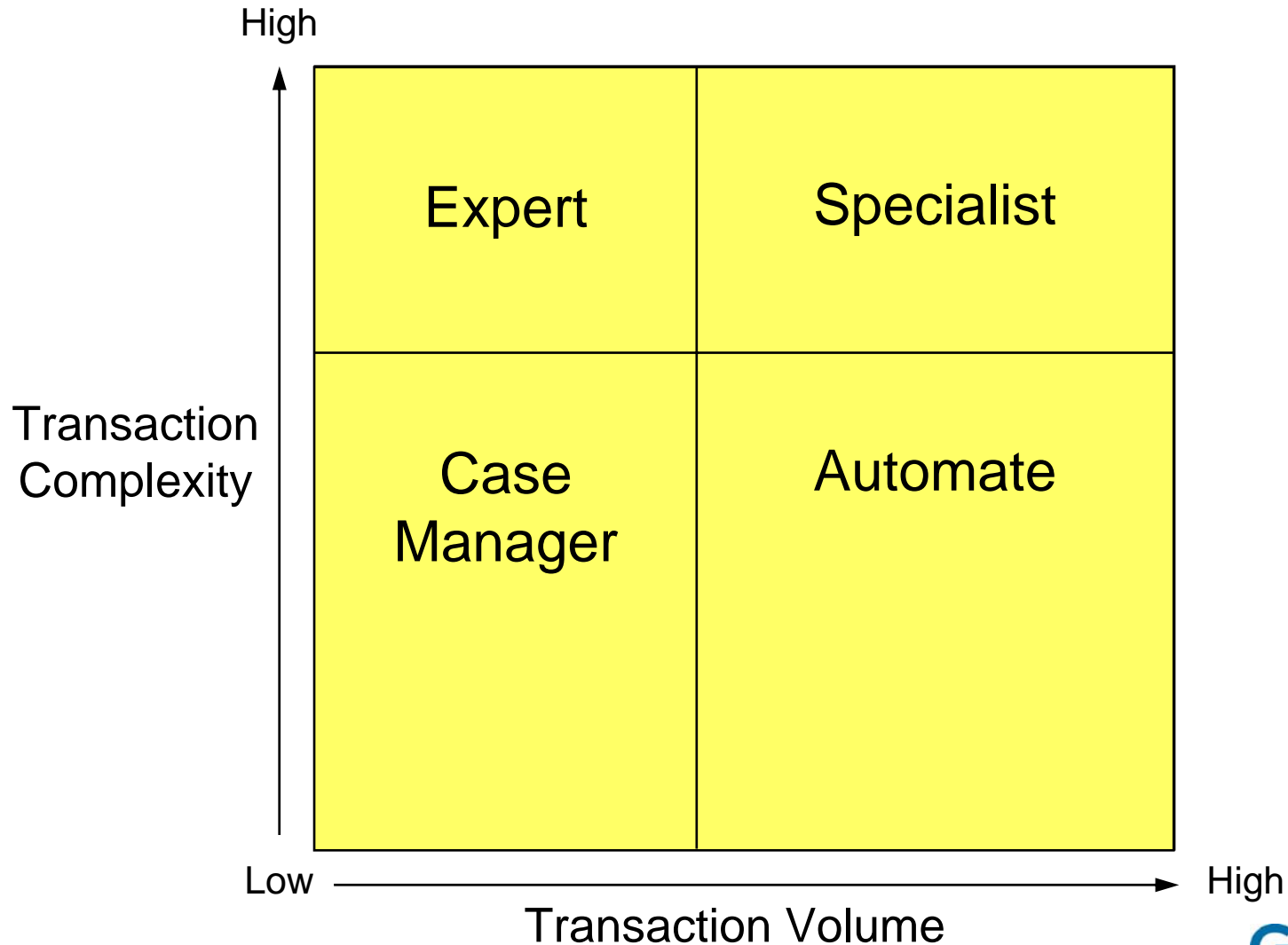
# The Convergence of Public Policy, Technology and Societal Need



# Key Issues

1. How should government agencies take advantage of the technology that is available to meet citizen complex needs?
2. What should government expect from product and services vendors?
3. How does government overcome the barriers to success?

# Citizen Service Triage



# Human Services Foundation

- Human judgment
- Decision making beyond policy
- Professional expertise
- Real time rule-making
- Build knowledge into system

- Gatekeeper
- Basic program information
- Broad, but shallow service
- Agent-scripting
- SRs to specialists or experts
- Service scheduling (SCM)

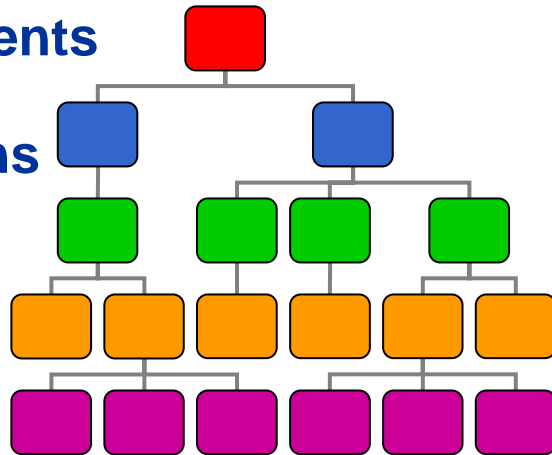
- Specialized, but repetitive services
- Service from multiple sources
- Services within bounds of policy

- Information
- Self-service
- FAQs
- Registration
- On-line applications
- Referrals

# Knowledge Workers

Departments

Divisions

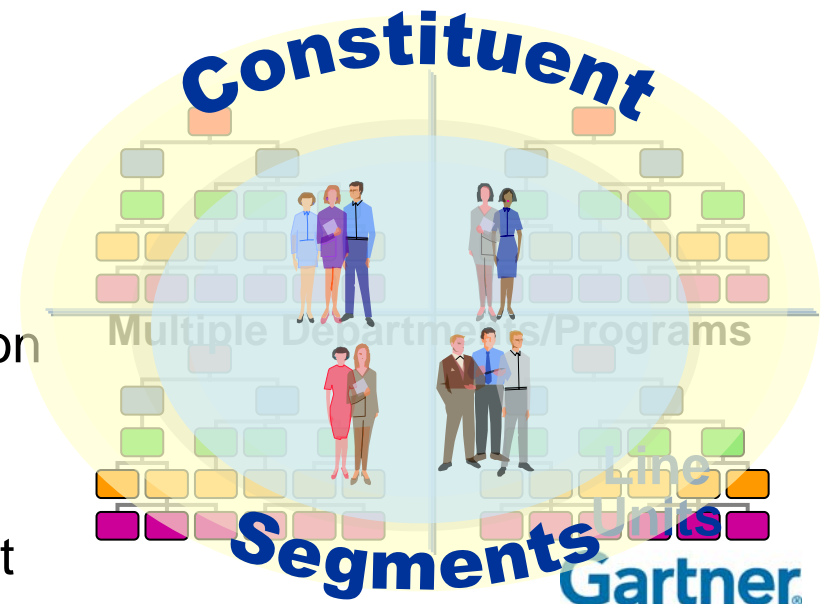


## Traditional Hierarchical Organization

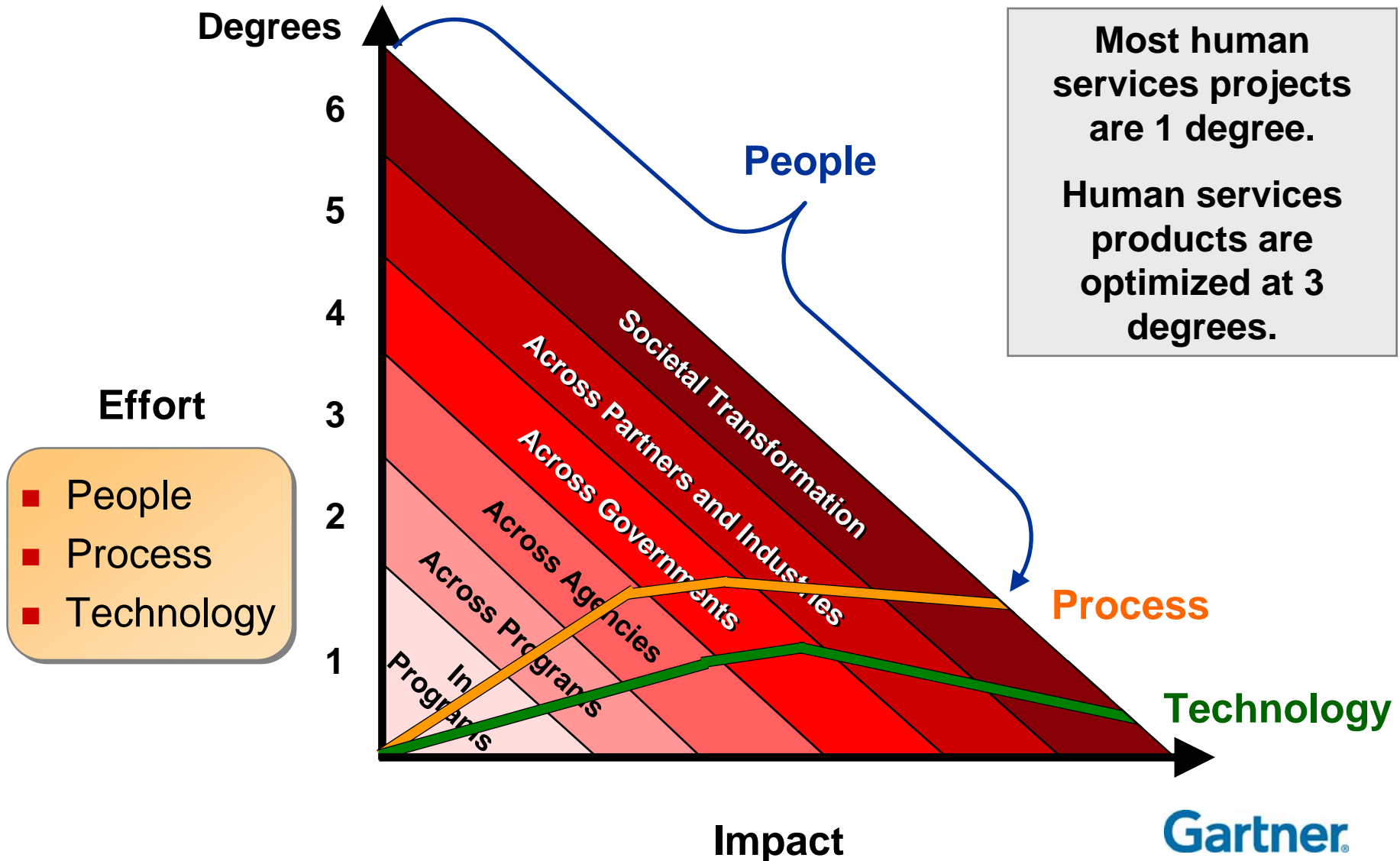
- Program-centricity
- Many handoffs (high error rates)
- Systematic work and little discretion
- Assembly line mentality
- Constituent falls through gaps

## Who's caring for your clients? Broad and diverse teams:

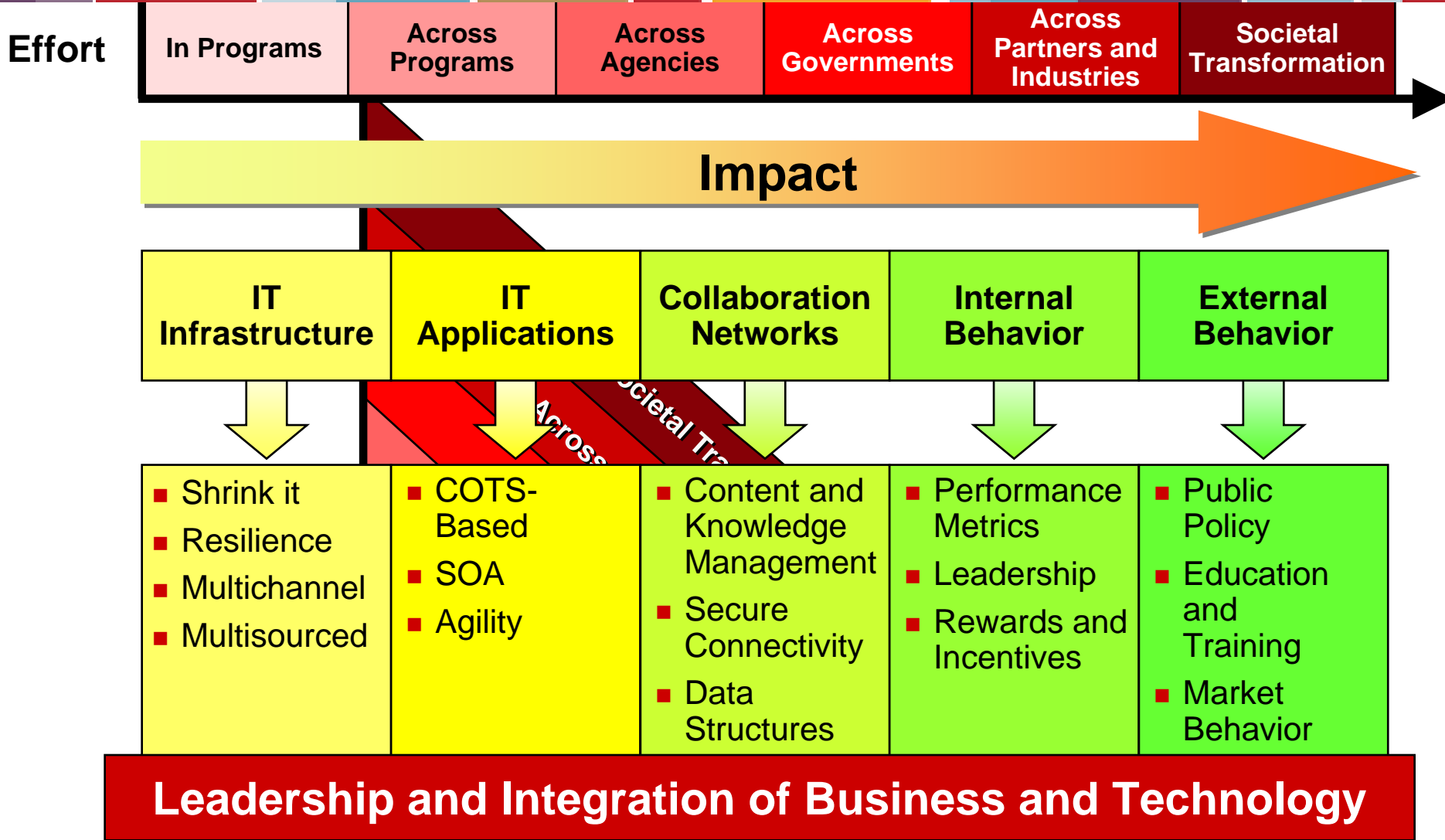
- Client-centricity
- Interdependence
- Unstructured work and high discretion
- Distributed decision making
- Automated service management
- Focus on outcomes rather than input



# Degrees of Innovation in Government

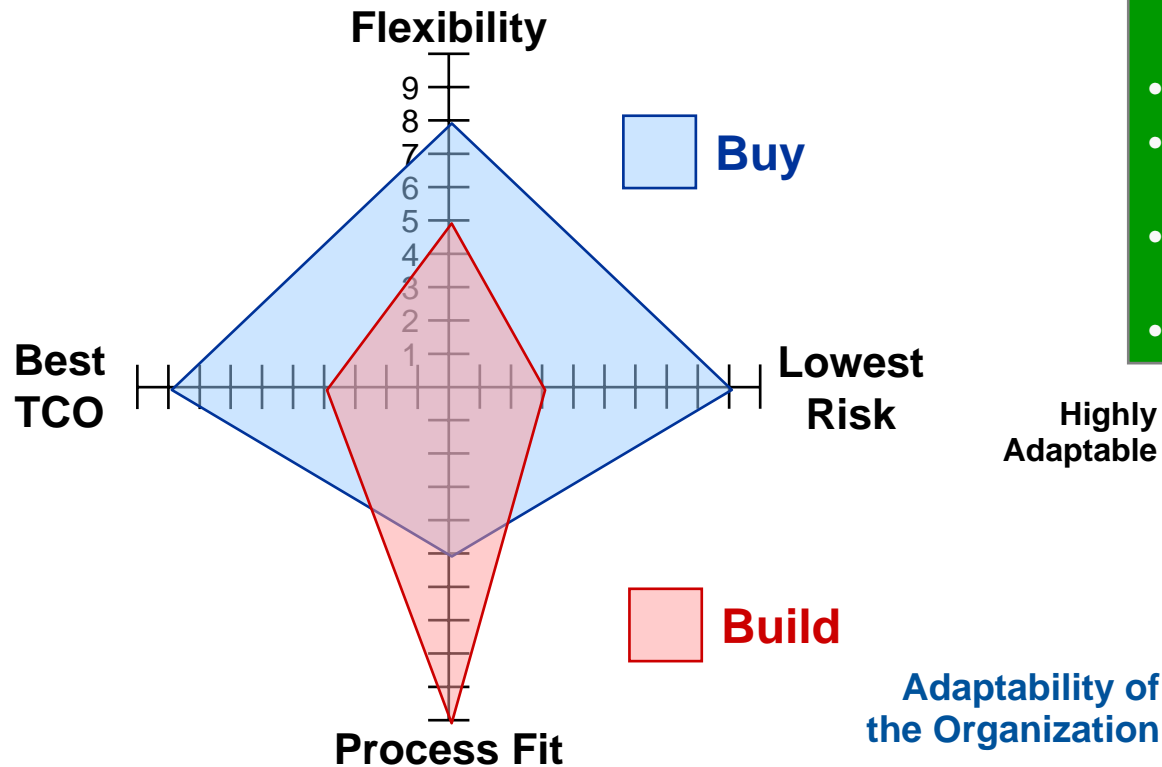


# Maximize Impact With the Right Focus



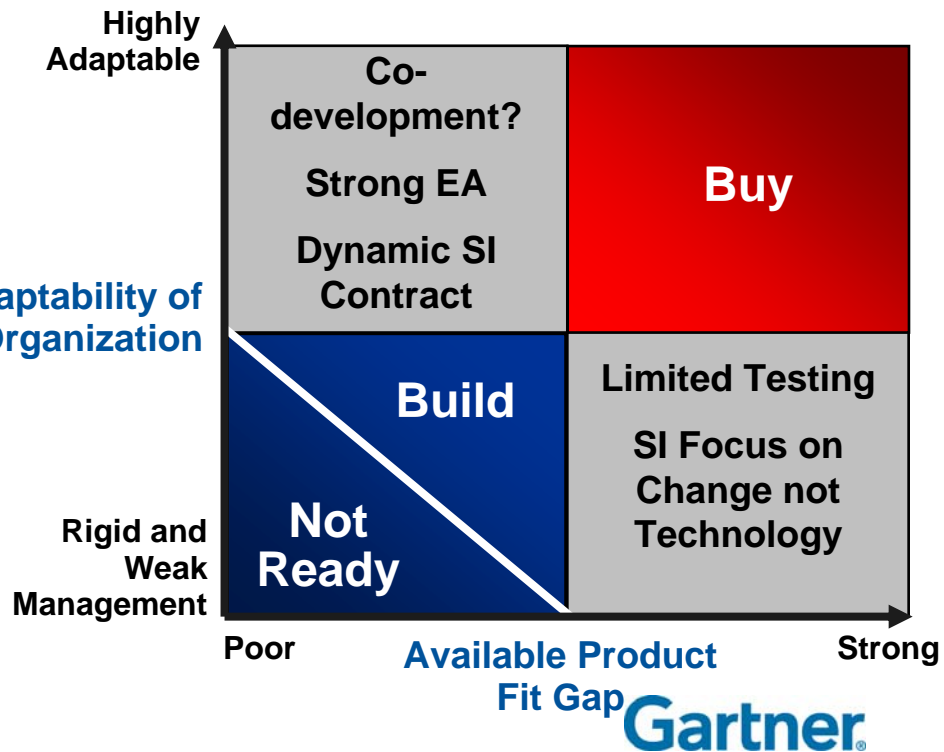
Impact

# The Buy-vs.-Build Dilemma

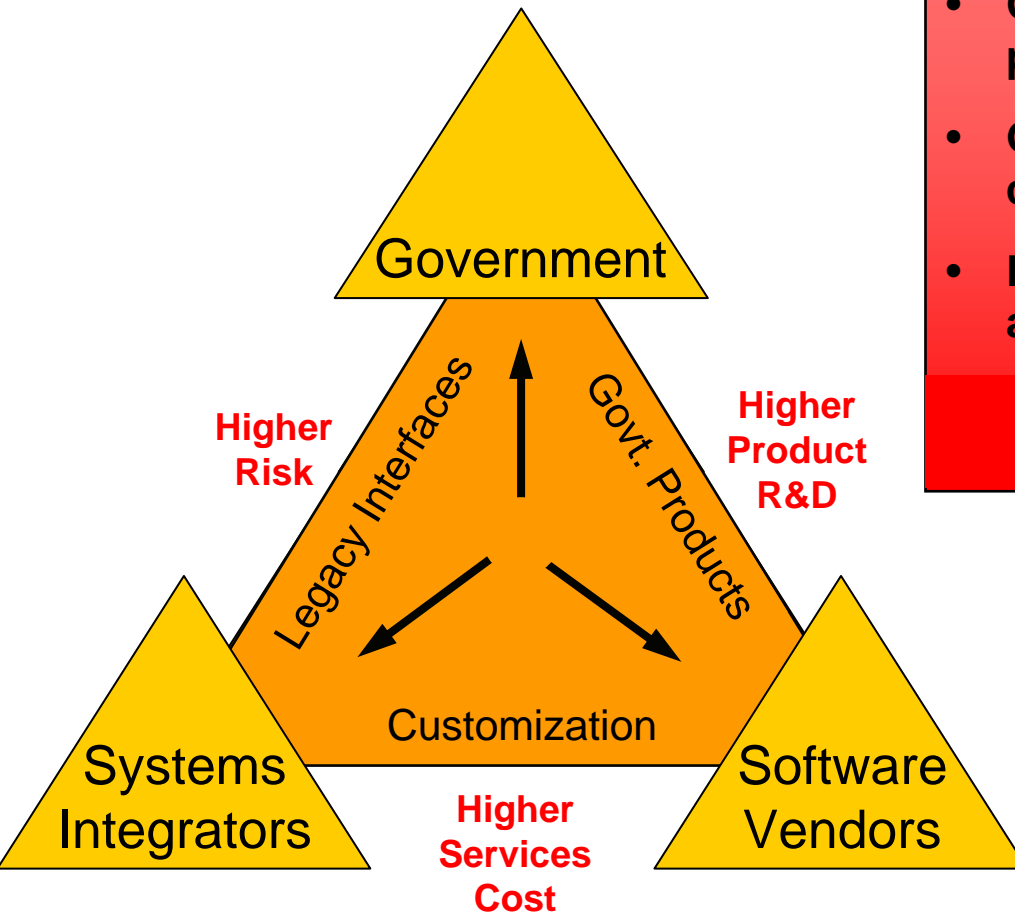


- Critical Issues in Buy-vs.-Build:**
- Is there a product to buy?
  - What is the aptitude of your management to lead the change?
  - How time-sensitive is your need for technology?
  - Will your procurement approach work?

- For some, the answer is neither buy nor build — you aren't ready for either!**
- You lack the internal capacity to manage a complex project.
  - Your management isn't ready to engage in the necessary leadership.
  - The internal technical skills are too out-of-date.



# Implementing Solutions: Inherently Conflicting Goals



## Problem

- Government can't/won't change business processes to fit products.
- Government pays integrators a lot to customize.
- Products become expensive to maintain and difficult to upgrade.

## The Way Forward

- Use consultancies to focus on organizational change, rather than code customization.
- Get broader organizational acceptance to step outside narrow programmatic groups (within three degrees of Innovation).

# Strategic Technology Map: Balance Productivity and Client Experience

## Government Productivity

- Reduces internal labor hours
- Coordinates handoffs
- Reduces errors/fraud
- Reduces Complexity

## Challenge of Achieving ROI

- Multiple program dependencies
- Multiple agency/jurisdiction dependencies
- Ease of measuring benefits
- Cultural change required
- Time to deploy
- Investment required
- Perceived risk of technology
- Payback time

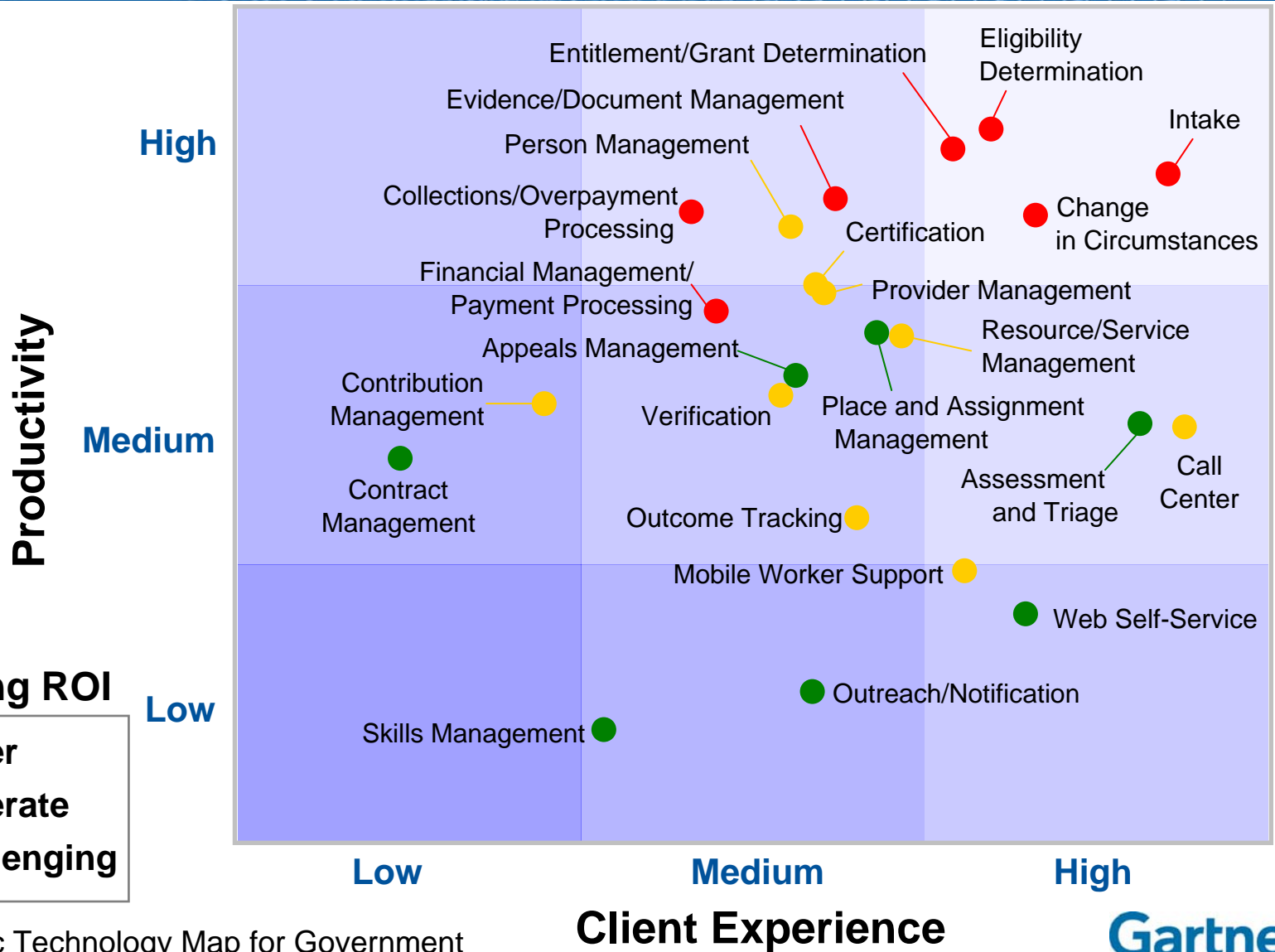
- **Easier**
- **Moderate**
- **Challenging**



## Client Experience

- Shorter decision cycle
- Easier to find solutions
- Easier documentation
- Ease of status checking
- Accuracy
- Scheduling ease
- Clarity of options

# Human Services Functionality

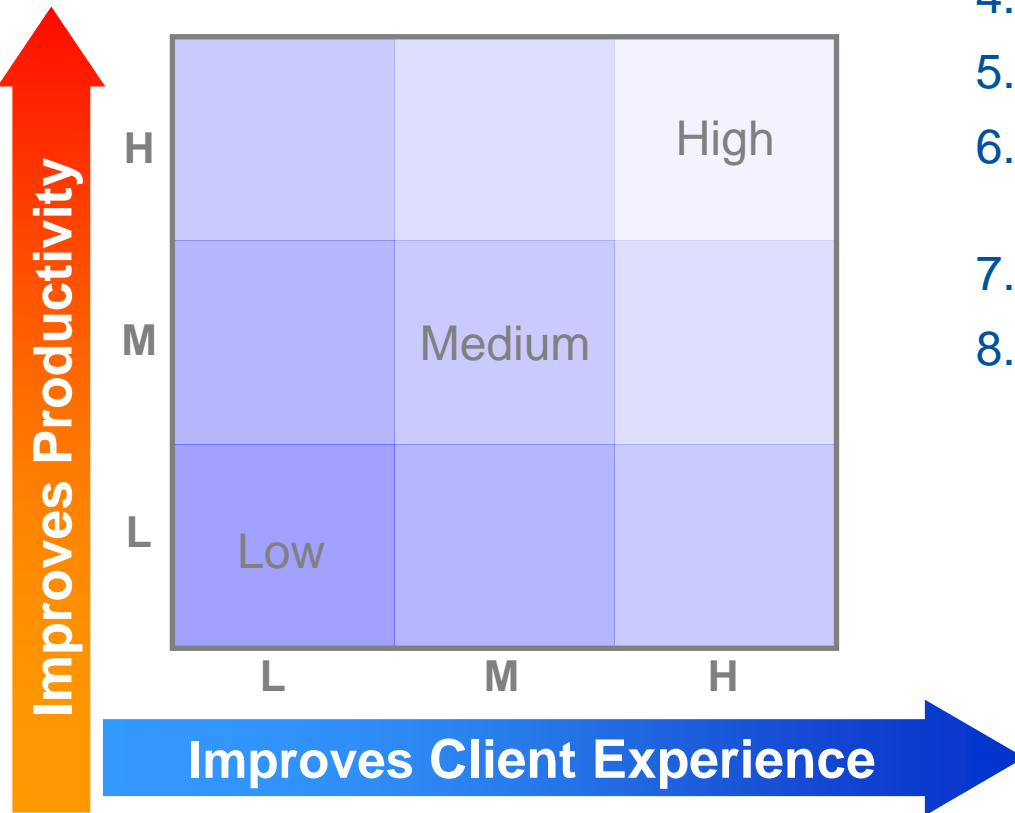


# Using the Road Map Approach

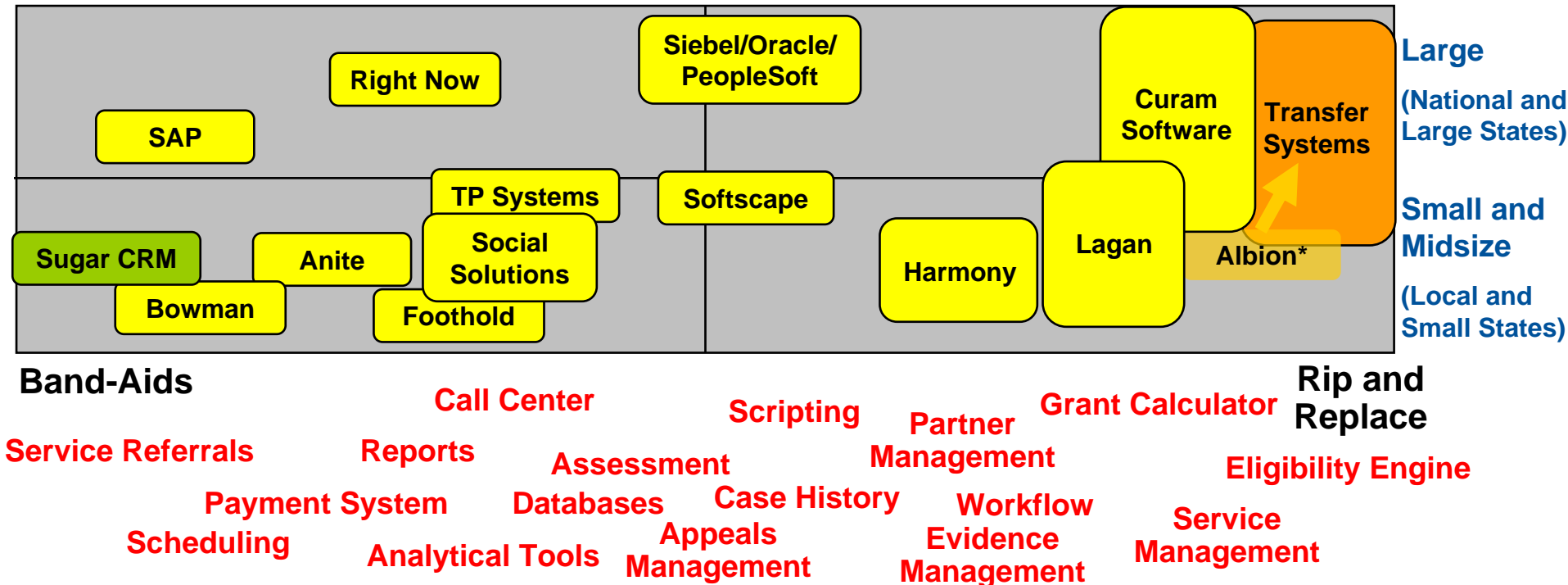
The model will not look the same for every agency. What is most important to do will depend on political drivers and where your systems are currently weak.

## Internal Road Mapping Steps

1. Identify compelling need
2. Identify the business problem
3. Rank system shortcomings
4. Scan the market
5. Conduct ROI and fit-gap analysis
6. Develop portfolio management strategy
7. Build the business case
8. Conduct the procurement



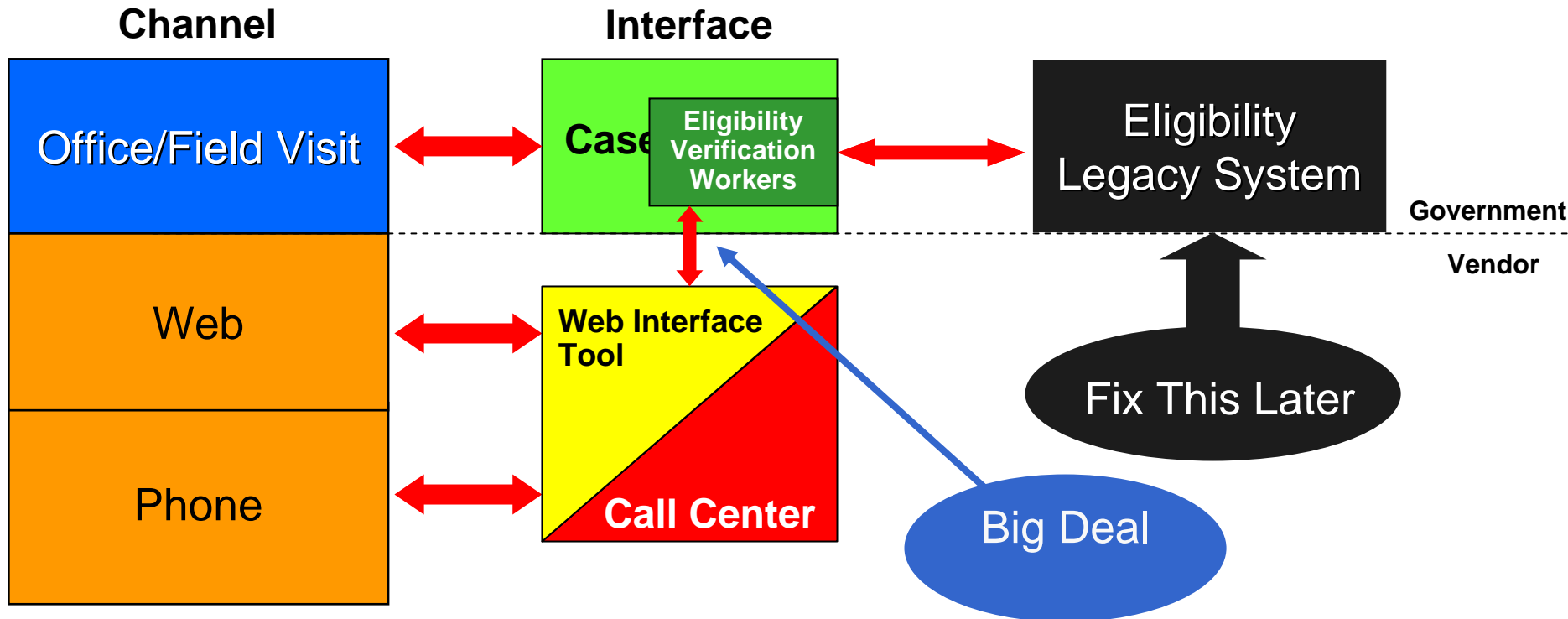
# Shifting Market of Solutions



## Notes:

- Fewer players in the traditional transfer system market
- Most governments creating RFPs that enable transfer to product, but more shifting toward product
- M&A activity picking up (Oracle, Lagan and ACS\*)
- Interesting partnerships (Harmony/Microsoft and Curam/SAP)
- Traditional CRM products developing more-specific functionality
- Small case management systems remaining in SMB market
- Embryonic stages of open-source CRM

# The Next Wave: BPO (Texas and Indiana are Just the Beginning)



## Critical Success Factors

- Focus on the handoffs
- Web case management front end vital for the clientele and caseworkers
- Training on process and tools for call center and clients
- Channel management strategy
- Phase it in because it is a massive culture shift for everyone (capture institutional memory)

# Procurement Best Practices: Recommendations

- If buying, separate solicitations for product and services:
  - Buy products based on an enterprise architecture
  - Consider an RFI for product first
- RFP should specify the business problem — not the expected solution. Let the vendors propose their best ideas — not simply agree to yours.
- Reduce the weight of price and increase the weight of risk:
  - Least expensive is nice but not at the expense of your career
  - Understand the long-term TCO
- Modularize the project from the beginning.
- Build a contract that assumes changes will be needed:
  - Exhaustive SOWs are a waste of time.
  - Change management/dispute resolution process is vital.

# Are you Evaluating the Right Things?

Item #	Primary Component of the Evaluation	Weight	Points	Pass/Fail Minimum	Pass/Fail Minimum Recommended
1	Capability of the proposing organization and quality of proposed team	20%	200	?	160
2	Project risks (nontechnical) and modularity of deliverables	10%	100	?	75
3	Impact on customers/users	15%	150	?	100
4	Proposed solution (see risk-weighted scoring model)	25%	250	?	200
5	References of the proposing firm for the proposed solution	15%	150	?	120
6	Cost (see detailed cost model)	15%	150	?	0
<b>Total</b>		<b>100%</b>	<b>1,000</b>		

## Instead of:

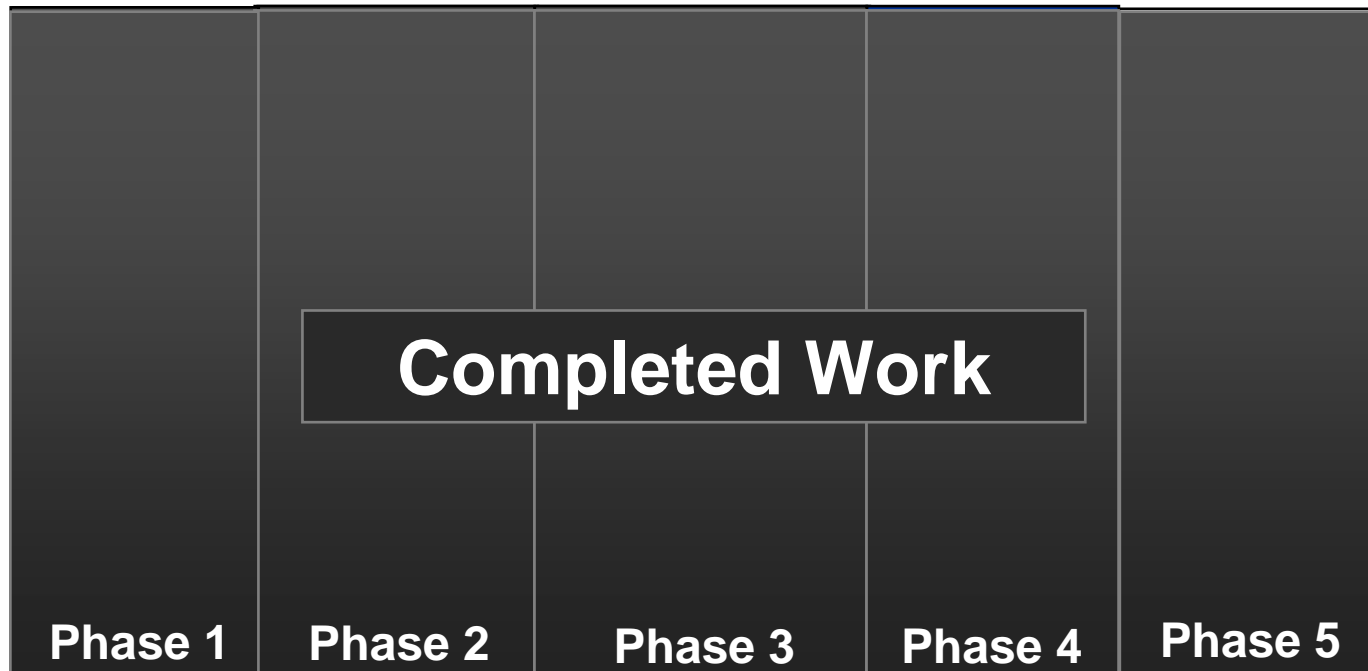
- RFP compliance
- Rigid process
- Comprehensive turnkey
- Price model
- Pro forma reference checks
- Static evaluation teams
- Apples to apples

## Focus on:

- Key drivers of project success
- Learning process
- Phased implementation
- Multidimensional cost model
- Early/meaningful reference checks
- Multiple teams using their strengths
- Apples-to-oranges

# Phased Implementation

## Project Description and Scope



- Bid process defines Phase 1 in its entirety only.
- Subsequent phases are sketched out and defined as work is completed.
- Retain the option to change vendors in subsequent phases.

# Are These Projects Putting Your Career at Risk?

Issue	Challenge	Advice
<b>Degrees of Innovation</b>	<ul style="list-style-type: none"> <li>• Poor cross-program integration</li> <li>• Governance</li> <li>• Organizational buy-in</li> </ul>	<ul style="list-style-type: none"> <li>• Understand how far technology can take the project</li> <li>• If leaders aren't engaged, stop!</li> </ul>
<b>Procurement Process</b>	<ul style="list-style-type: none"> <li>• Buying systems like commodities</li> <li>• Assuming nothing will change in law/policy</li> </ul>	<ul style="list-style-type: none"> <li>• If your process won't enable success, don't start</li> <li>• Focus on changes and dispute resolution, not just on SOW</li> </ul>
<b>Project Management</b>	<ul style="list-style-type: none"> <li>• Poor project management discipline, lack of experience</li> <li>• MSW culture</li> </ul>	<ul style="list-style-type: none"> <li>• Strong governance for rapid decision making</li> <li>• Timely governance process</li> </ul>
<b>Custom Coding</b>	<ul style="list-style-type: none"> <li>• Solutions that are expensive and hard to maintain</li> </ul>	<ul style="list-style-type: none"> <li>• More COTS, less custom</li> <li>• More process change, less software change, if you are ready</li> </ul>

These are NOT supposed to be "IT projects". If they are, you lose!

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