

Information Technology Project Expansion

(FY2018 Appropriation Act - Public Act 107 of 2017)

December 1, 2017

Sec. 1901. (1) By December 1 of the current fiscal year, the department shall report to the senate and house appropriations subcommittees on the department budget, the senate and house fiscal agencies, the senate and house policy offices, and the state budget office all of the following information:

(a) The process used to define requests for proposals for each expansion of information technology projects, including timelines, project milestones, and intended outcomes.

(b) If the department decides not to contract the services out to design and implement each element of the information technology expansion, the department shall submit its own project plan that includes, at a minimum, the requirements in subdivision (a).

(c) A recommended project management plan with milestones and time frames.

(d) The proposed benefits from implementing the information technology expansion, including customer service improvement, form reductions, potential time savings, caseload reduction, and return on investment.

(e) Details on the implementation of the integrated service delivery project.

(2) Once an award for an expansion of information technology is made, the department shall report to the senate and house appropriations subcommittees on the department budget, the senate and house fiscal agencies, the senate and house policy offices, and the state budget office a projected cost of the expansion broken down by use and type of expense.



Michigan Department of
Health & Human Services

RICK SNYDER, GOVERNOR
NICK LYON, DIRECTOR

Section 1901. (1)

(a) MDHHS' process for identifying IT projects includes the following steps:

1. Identification by the Business/Program Areas of a possible Information Technology (IT) need.
2. Preparing a work intake request for submission to a Program Management Office (PMO) to review/clarify the Business/Program need, review existing technology solutions, estimate a high level cost and propose an approach.
3. The request is prioritized for the PMO to take the next step to develop a project charter to establish the scope, schedule and cost for the project.
4. Once the project charter is approved the project begins.

(b) The approved approach in the project charter may include leveraging existing technology that the State of Michigan owns or leveraging an existing vendor contract through a statement of work modification which would not require a competitive bid working. MDHHS works with the Department of Technology, Management and Budget to determine the opportunities for leveraging and subsequent contract modifications. If the State does not have an opportunity to leverage existing technology or vendor contracts for a solution, then we engage with the Department of Technology, Management and Budget in the State of Michigan's competitive procurement process. The competitive procurement process includes creating a Request for Proposal (RFP), posting the RFP, evaluating the RFP and executing a vendor contract.

(c) The MDHHS Business Integration Center implements projects using industry standard, repeatable project management practices that are aligned with the State of Michigan Software Engineering Methodology (SEM) and State of Michigan Project Management Methodology (PMM) as part of the State Unified Information Technology Environment. The approach to applying these methodologies to this project is defined in detail in the ISD PMO Project Management Plan which is included in this response as "Integrated Service Delivery Program Management Office Program Management Plan."

(d) As a project charter is developed it includes various standard sections including the project purpose to meet specific Business/Program needs and goals, strategic alignment of the project within MDHHS strategic priorities and IT Roadmap, project assumptions and the benefits/impacts that are planned to be derived from delivery/completion of the project. If the State does not have an opportunity to leverage existing technology or vendor contracts for an IT Expansion solution, using the approved project charter as guide, MDHHS moves forward with DTMB IT to develop a State of Michigan RFP. The requirements for an RFP statement of work are created by the Project Team and incorporated into the State of Michigan's RFP template.

(e) Details on the implementation of the integrated service delivery project.

ISD Portal

ISD Portal Release 1.0 – 9/9/2017

The first release of the ISD Portal contained the core portal framework itself, which contained end-user and community partner registration (including MiLogin and identity-proofing), integration with community resources (i.e., MI 2-1-1), the Needs Assessment person-centric service, and the ability for a customer to view their benefits that exist within Bridges.

This release began as a pilot in Muskegon County.

ISD Portal Release 2.0 – 2/10/2018

This second release of the ISD Portal contained numerous enhancements to the user/community partner registration, self-service features (such as Renew My Benefits, Change My Information), and delivery of the Holistic Application, which is the replacement eligibility application to MiBridges. The new application matches the new paper application.

This release expanded the pilot beyond Muskegon County, into four additional counties including Genesee, Jackson, Clinton and Eaton.

ISD Portal Release 2.1 – 3/24/2018

This third release of the ISD Portal contains general portal user interface and workflow enhancements, resolves defects, and makes the Portal fully available in Spanish and Arabic languages.

The release will be made available statewide through a coordinated rollout between 3/24/18-4/20/18.

Universal Caseload (UCL) – Pilot dates: Late February 2018-early May 2018

The first release of UCL begins the pilot in Shiawassee and Gratiot counties, and makes available the new task-management interface to caseworkers working in the Bridges system.

Contact Center (CC) – Pilot dates: Late February 2018-early May 2018

The first release of CC begins the pilot in Shiawassee and Gratiot counties, and makes available numerous self-service features through the new phone system, and connects a customer directly with a caseworker.

See additional documents

ISD Updated Program Charter

ISD Portal Project Charter

ISD Universal Caseload Pilot Project Charter

ISD Contact Center Pilot Project Charter



Integrated Service Delivery Program Management Office

Program Management Plan

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Revision History

Date	Version	Author	Change Description
9/1/2016	0.0.1	Kevin Adler	Initial Draft
10/18/2016	0.0.2	Kevin Adler	Minor document enhancements
11/4/2016	0.0.3	Kevin Adler	Adding the PMO Funding Management information
12/6/2016	0.0.4	Kevin Adler	Program Governance Update (Section 1.4.1)
12/14/2016	0.0.5	Kevin Adler	Added bookmarks for the Integration/Business Requirements touchpoints (Section 1.4)
12/29/2016	0.0.6	Kevin Adler	Minor enhancements and links to other PMO process documentation.
1/12/2017	0.0.7	Kevin Adler	Provide links to the updated ISD PMO Governance diagram, and update the meeting cadence.
1/23/2017	1.0	Kevin Adler	Overall updates to the document to account for Leadership and Ownership responsibilities.

1 Program Management Plan

1.1 Introduction

To improve project delivery, the Michigan Department of Health and Human Services (MDHHS) implemented the Business Integration Center (BIC) to serve the entire MDHHS agency. The purpose of the BIC is to improve MDHHS project delivery using common project management processes and disciplines. The BIC will strive to standardize and introduce economies of repetition in the delivery of projects and serve as the source of documentation, guidance, reporting, and metrics on the practice of project management and project delivery. The BIC will plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver projects on time, on budget and within scope.

Project Planning occurs in advance of a project, and subsequently at the beginning of a project, to understand exactly how the project will function. This is the “Project Plan” document for the Integrated Service Delivery (ISD) Program Management Office (PMO), and serves as the process disciplines that will be adhered to by the all ISD PMO teams and projects. This is not process for process sake – this is the tailoring of processes to support the successful implementation of PMO Projects within budget and schedule.

1.2 BIC Program Management Office Purpose

The purpose of a BIC PMO Program is to improve integrated business and technology project delivery using common project management processes and disciplines, concentrating in the areas of Program / Project Monitoring, Business Integration, Quality Assurance, Change Management/Business Readiness, and Strategic Alignment. The PMO will strive to standardize and introduce economies of repetition in the execution of projects and will serve as the source of documentation, guidance, and metrics on the practice of project management and project execution.

The goal of the BIC is to effectively plan and manage the MDHHS portfolio of projects using common processes, structure, and governance, enabling MDHHS to deliver both business and technology projects on time, on budget, and within scope.

1.3 Program Charter

Review the BIC-ISD Program Charter to understand the program purpose, objectives, and high-level scope.



The Integrated Service Delivery Program charter can be found [here](#) on the program’s SharePoint site.

1.4 Program Governance Framework

The purpose of program governance is to serve as a mechanism for ensuring all audiences and stakeholders are aware of their responsibilities for managing ISD PMO project information in order to provide the following:

- Program and Project Management for both business and technical projects
- IT vendor management and monitoring
- Project control and monitoring
- Project status and risk reporting
- System integration for all participating vendors
- Technical requirements and system level design development that advances MDHHS toward future goals and objectives
- Technical testing of Michigan systems and interactions with outside systems

1.4.1 Program Governance Organizational Chart



The Integrated Service Delivery PMO Governance diagram can be found [here](#) on the program's SharePoint site.

The ISD PMO Governance Organization has been designed around Strategic, Tactical (Leadership), and Operational responsibilities. These responsibilities have been summarized below.

Strategic:

- Strategic Plan Development
- Remove roadblocks to program success
- Render strategic decisions
- Serve as the focal point for resolving escalated issues and risks with other State Agencies and external organizations
- Provide support for the overall program
- Review and approve use of budget dollars
- Communicate program issues and concerns to the Program Leadership team for resolution

Tactical (Leadership):

- Understand, monitor, and control the program budget
- Establish clear goals and deliverables
- Remove roadblocks to program and project success
- Provide support for the program and projects
- Communicate program and project issues/risks to the Ownership team for resolution
- Review and approve all program change request items not requiring escalation to the Executive Steering Committee
- Render decisions and provide requested project input/feedback within required timeframes
- Serve as the focal point for resolving issues and risks with other State Agencies and organizations external to the State of Michigan

Operational (Ownership):

- Implement proven processes and controls
- Understand, monitor, and control the projects
- Create focus and accountability
- Drive better decisions faster
- Resolve issues and mitigate risks at the project level
- Communicate project issues and concerns to the Program Leadership team when necessary
- Develop partnerships and collaboration

1.4.2 Program Governance Committees

MDHHS BIC governance committees are forums with standing agendas and decision-making authority. They bring together the authoritative leaders within the appropriate State Agencies to make decisions and recommendations. Additional committees may be organized later if the need arises.

See section 1.6 Communications Management for more details related to the frequency that ISD committees meet.

Executive Steering Committee

The Executive Steering Committee is the highest decision-making body for the BIC. This group operates at the strategic level and will make decisions on items surrounding portfolio, business vision, and program budgets. This committee consists of MDHHS Deputy Directors, including the BIC Director and DTMB General Manager. It is considered an escalation point for critical issues and risks.

Enterprise Steering Committee

The Enterprise Steering Committee is an enterprise decision-making body for the BIC that crosses all Program Offices. This committee operates at the strategic level and will make decisions on items surrounding portfolio of project requests, strategic business alignment, and funding sources. The Enterprise Steering Committee consists of the BIC Enterprise Integration Director, BIC Enterprise Program Manager, the DTMB Technology Office Director, and the BIC Financial Manager. This committee is an escalation point for critical issues and risks.

ISD Executive Steering Committee

The ISD Executive Steering Committee is the highest decision-making body for the ISD Program. This group operates at the strategic level and will make decisions on items regarding Program Vision and Budgets. This committee consists of MDHHS Deputy Directors, including the BIC Director and DTMB General Manager. It is considered an escalation point for critical issues and risks.

ISD Leadership Team

The Leadership Team consists of Business Program Owners, Business Delivery Liaisons (BIC business delivery leaders), PMO Manager, Technical Delivery Owner (DTMB business relationship manager), Technical Vendor Partner, Financial Management Specialist, and the System Integration Team Functional Manager. The Program Leadership team is responsible for decision-making at the tactical level of the organization, including approval of all projects, schedules and major milestone changes, budgets and costs changes, and approval of all scope removal requests.

ISD Ownership Team

The Ownership Team is responsible for owning overall integration and implementation of the project portfolio, eliminating day-to-day operational issues and risk. The ISD Program Ownership Team consists of MDHHS and DTMB Leadership resources, Scrum Masters, and Project Managers.

Project Teams

Project and operational leadership teams are responsible to deliver goals and objectives related to specific projects. These teams normally consist of a Project Manager leading various resources in the State Agencies and/or the vendor community. These teams consist of State Agency and/or vendor staff responsible for implementation of the scope of their given project.

1.5 Program Roles and Responsibilities

Each ISD PMO Program and Project role is defined along with the responsibilities for that role in order to set clear expectations. These roles and responsibilities are inherited from the MDHHS BIC roles and responsibilities document.



The Integrated Service Delivery Roles and Responsibility document can be found [here](#) on the program's SharePoint site.

1.6 Program Communications Management

Communication Management sets the communications framework for the BIC PMO. It will serve as a guide for communications throughout the life of the BIC PMO and will be updated as communication needs change.

This plan identifies and defines the roles of persons involved with communications within this program and projects. It also includes a communications matrix, which provides a summarized view of the multiple communication items such as the type of communication, the frequency of the communication, who is responsible for making sure the communication takes place, the audience for a particular communication item, and whether or not approval is required.



The Integrated Service Delivery Communication Management Plan can be found [here](#) on the program's SharePoint site.

1.7 Program Contact List



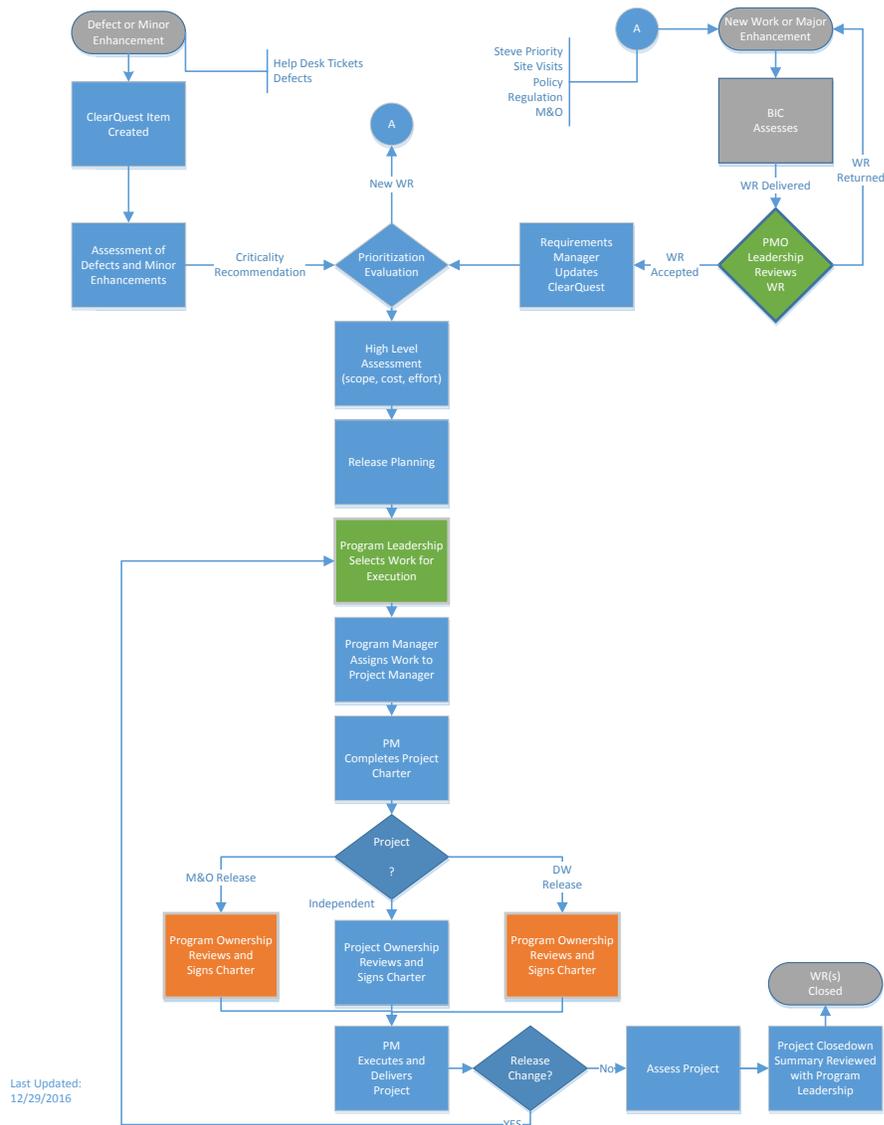
The Integrated Service Delivery Contact List can be found [here](#) on the program's SharePoint site.

1.8 Program Work Intake, Assessment, and Approval

Work coming into the ISD Program must be managed in a consistent manner. Work is considered as all additions, changes, or deletions of functionality to the ISD portfolio of systems, as well as any changes needed to support the infrastructure for these systems. Work also includes initiatives to support the PMO itself (i.e., upgrades to tools that directly support the PMO).

Additionally, work could be any business initiative that support the systems or the PMO (e.g., policy changes). The process diagram below depicts how work enters into the PMO, is prioritized, is potentially assigned to be executed (becomes a project), and if assigned, finally executed and implemented.

BIC ISD PMO Workflow Approval Process



Work Intake

There are two paths in which work can flow into the ISD PMO. The first path is via Maintenance and Operations (M&O), where defects and minor enhancements are identified (through the Helpdesk or Project Testing) and collected. The second path is via the BIC Work Intake process.

Maintenance and Operations (M&O)

Defects and Minor Enhancements are identified, collected and documented. These items are documented in ClearQuest. The documented defects and minor enhancements are assessed to determine area of impact, some sizing, possible grouping of like items, and impact on users. After assessment, items identified as having the greatest impact are then prioritized internally and assigned a project or release.

BIC Work Intake

All major enhancements to systems, new systems, infrastructure changes, changes or additions to PMO support tools, and any new business Initiatives must be requested through the BIC Work Intake process. This process allows the BIC Work Intake Team to review each new request for strategic business alignment; funding need and potential fulfillment; and high-level scope, duration, and estimation of cost.



The BIC Work Intake Request form can be found [here](#) on the BIC SharePoint site.

For work deemed applicable to the ISD PMO, the analysis is passed on to the PMO for review. The ISD PMO Leadership team reviews each request to determine if the work truly belongs in the PMO, while also ensuring that enough information to process the request is documented.

If the request does not have enough information or if it does not belong to the ISD PMO, the request is returned to the BIC Work Intake team. If the request is valid and has the appropriate information, the request is accepted into the PMO.

Work Prioritization

The ISD Leadership team will set, or reset, priority for M&O project(s)/release(s), internal work items, and BIC work requests.

High-level Assessment

Some work items may need further analysis to be able to determine size (effort and duration) before work assignment can take place. For such items, resources will be assigned to identify additional scope to determine effort needed, and duration to implement. This information will be documented with the work item.

Work Assignment

The ISD Leadership team will assess all prioritized work, determine the most appropriate release (if applicable), and assign the work to the appropriate ISD program area for implementation.

Work Execution

The ISD Ownership Team will review all recommendations for work assignment and either approve the recommendation or request additional review by either the Work Prioritization or the Release Planning team (or both).

The Program Manager for a given Program will assign the recommended work from the Ownership Team to a Project Manager to create a project charter. Once the project charter is approved, the Project Manager can begin executing the project.

1.9 Program Document Collaboration

Microsoft SharePoint will be used for Program and Project collaboration. Program documents will be stored here (i.e., plans, processes, and templates). Administrative information for the ISD PMO team will be stored on the site as well.

SharePoint provides a secured location for all State and Vendor-Partner resources to access program and project deliverables. Documents will be under version control, and SharePoint will track who stored the document and the storage date.

1.10 Program Budget and Financial Tracking Processes

The BIC PMO has a dedicated Financial Specialist who will work at the leadership level to assist in planning and forecasting annual budgets, as well as assist in the approval of project work. The Financial Specialist will also work at the operational level to organize and track budgets and financials associated with all BIC PMO projects. The budget office sends out monthly consolidated cost sheets, detailing resource hardware, software and vendor service costs. The PMO Financial Specialist maintains origin of these costs. The associated processes are described in this section.

1.10.1 Financial Tracking Process

In conjunction with the BIC PMO Program Coordinator, the Financial Specialist will track effort hours reported and invoices submitted against the projected BIC PMO budget for the fiscal year. The goal is to determine whether the budget is being spent at the rate expected or over/under the projected amount by percentage and dollar amount. On a monthly basis, the cost versus budget information will be reported to the Project Managers, Program Managers, and Program Leadership Team. If/when areas of concern arise (spend rate is too high, funding sources depleted, etc.), appropriate action and escalation will be initiated to help alleviate the concern. =

1.10.2 Resource Cost Management Process (DCDS)

The Financial Specialist receives copies of all invoices related to staff costs. The BIC PMO Program Coordinator and BIC PMO Financial Specialist will receive copies from the Financial Specialist and update actual costs against projected costs to ensure staffing stays on track as projected. Similarly, DTMB will send an updates of actual costs for each budget/project line item that will also be incorporated into financial management reports.

2 Project Management

Project Management will focus on project-level activities that have a defined start and finish. Project Management applies the skills, tools, and techniques to meet project needs or expectations. By design, the processes used at the project level are aligned with the processes used at the program level to build conduits of information flow. Projects follow project management processes together with life-cycle methodologies to manage and execute the work necessary to meet project requirements.

The PMO will also utilize Microsoft Project to maintain detailed project schedules and for quality assurance analysis. All PMO project management processes are based upon the Project Management Institute's (PMI®) best practices.

2.1 Project Governance Framework

As part of establishing consistent project governance for all projects, a common leadership framework is required. For each project, the PMO Program Manager will work with the project stakeholders to establish the project governance, normally consisting of an assigned Project Manager, Business Delivery Liaison, Project Systems Owner, and potentially a Project Vendor Owner. The following depicts the common leadership roles necessary to govern the projects.

Project Manager

The Project Manager has overarching responsibility for the project. The project manager works with the appropriate Program Manager for the majority of work. The Project Manager defines schedule, control, and adjust all tasks and workloads of the project. They are responsible for guiding their teams and ensuring adherence to Child Welfare PMO processes. The Project Manager must also manage and track project issues and risks, ensuring that all project commitments are met. They communicate project status to clients and leadership.

Business Delivery Liaison

The Business Delivery Liaison has overarching responsibility and accountability for the people and BIC activities within the ISD PMO. The Business Delivery Liaison is responsible for ensuring the success of the PMO Implementation and Operations from the business standpoint. The Business Delivery Liaison reports directly to the Business Integration Administrator. All BIC business resources within the ISD PMO report up through the Business Delivery Liaison for all project work related to the PMO.

Technical Delivery Owner

The Technical Delivery Owner is responsible for ensuring the success of the PMO delivery mechanisms from the technology standpoint. Responsibility for the success includes the alignment of other department projects, as appropriate, to ensure that work efforts are coordinated and synchronized.

Project Vendor Owner

The Project Vendor Owner works directly with the project team to provide the institutional knowledge of the vendor-maintained products to support the project team in planning and execution. The Project Vendor Owner plans and works according to the project schedule, taking direction from the Project Manager and the Program Release Management Team.

2.2 Governance Reporting Cycle

The following diagram identifies the information flow and defined meetings that will be used to enable governance at the Program and Project level. The PMO will not be saturated with meetings, keeping key overall status progress to a limited amount of standard meetings.

Project Governance Reporting Cycle							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Weekly							
	Issue/Risk/Change Control Management						
	Stakeholder Management						
Bi-Weekly							
As Needed							

2.2.1 Status Reporting

Program Status Reporting

The PMO Manager and Program Managers will use a standard 4-Up Status reporting template, combined with a Program dashboard and individual Project dashboards, to communicate progress to Program Ownership, Program Leadership, etc. This report will be created weekly, and stored on the PMO’s SharePoint site. Per the Communication Plan, the Program status report will be reviewed with PMO Leadership on a pre-defined basis.

PMO Project Status Reporting

Each Project Manager will use a standard 4-Up Status reporting template for reporting project status. Each Project Manager will report status to the Program Manager and PMO Specialist on a weekly basis.

2.3 Total Cost of Ownership Process

The Total Cost of Ownership (TCO) Process is the mechanism for a Project Manager to understand, document, and manage the entire cost of a project. The TCO serves as the main document for

understanding funding information, including resources, resource effort, software, hardware, and other costs.



The Total Cost of Ownership template can be found [here](#) on the ISD SharePoint site.

2.4 Project Funding Tracking Process

In alignment with BIC Funding Sources, the PMO manages and tracks projects to their funding sources.

2.5 Issue, Risk, and Change Management

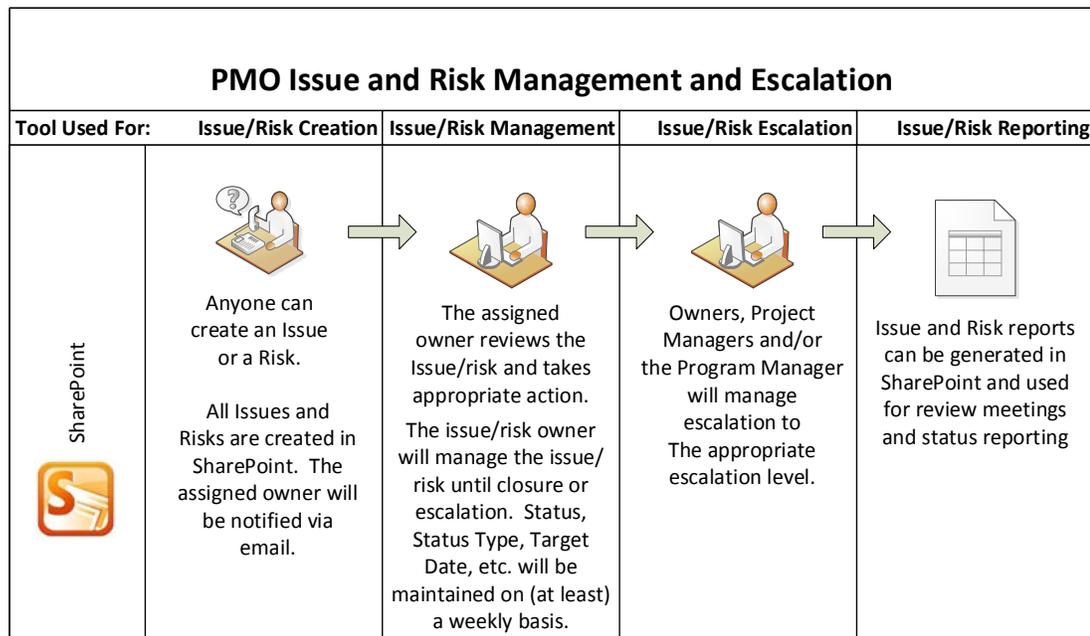
The Issue, Risk and Change Management and Escalation Procedure provides a means to spotlight, track, and resolve issues, risks or changes before they affect deliverables and/or client commitments. This procedure promotes visibility of long-standing, unresolved project level items, while maintaining a historical record of what occurred, the associated escalation levels and the associated resolution.

2.5.1 Issue and Risk Management

Definition of “Issue Management” – An issue is any point of controversy, debate, or concern that will adversely affect the success of the project. Issues can be identified at any level of the project and should be resolved at the lowest possible project level. An issue that cannot be resolved at a particular level of the project must be escalated to ensure the issue is brought to the attention of appropriate parties and resolved.

Definition of “Risk Management” – Risk management is the systematic and explicit approach used for identifying, analyzing, and controlling project risk. Risks will remain open as long as they exhibit probability of occurrence and potential impact to the project. A risk may be closed when the project stakeholders jointly agree that (1) the risk will never be realized, (2) the risk will not actually deter the project in any way or (3) the risk was reduced and is no longer a risk.

The PMO Leadership and Management Teams will review escalated items (Issues and Risks) weekly to determine status of existing items and a resolution approach for newly escalated items. The PMO SharePoint site will be the mechanism used to manage an item from initiation to closure.



Creating Issues and Risks

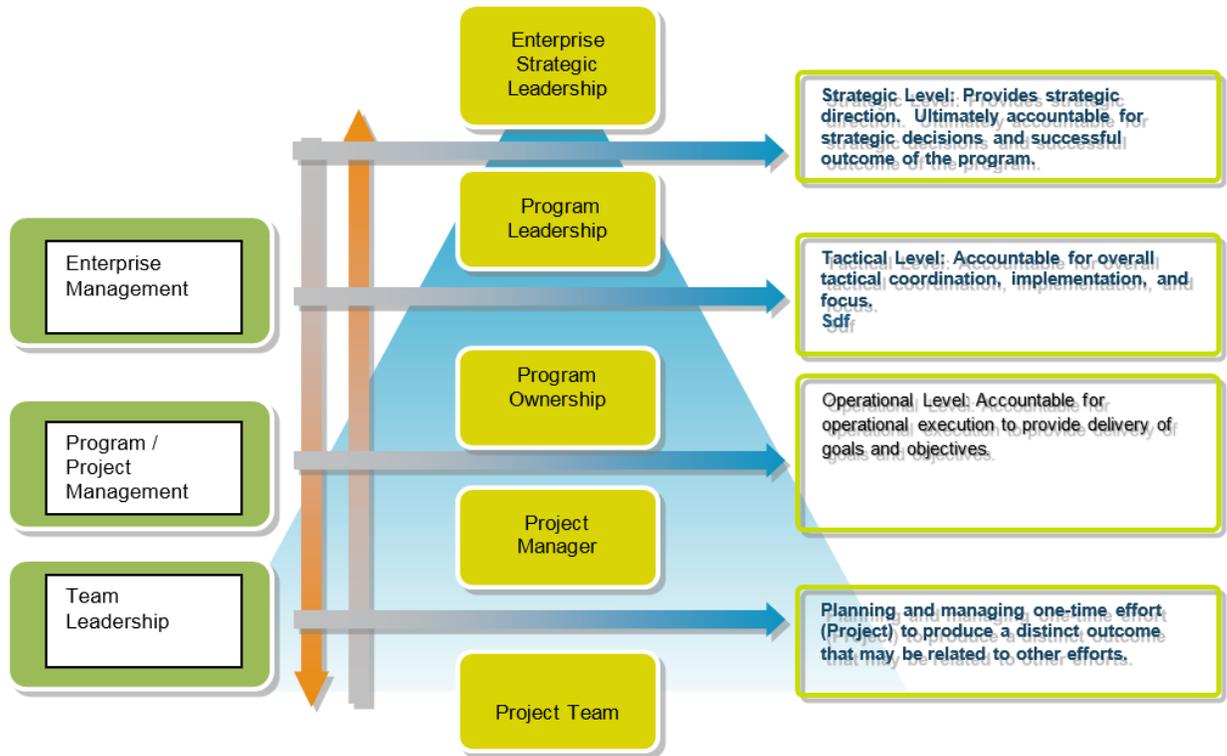
Any person working on a project can initiate an issue or risk. If the project overall status is Yellow or Red, there must be a corresponding Issue or Risk.

2.5.1.1 Managing Issues and Risks

Issues and risks created in the Item Tracker tool, located on the PMO SharePoint site, will be evaluated by the person to whom the issue or risk is assigned. If the issue or risk can be resolved easily, or if it is a duplicate, manage the issue or risk in SharePoint.

2.5.1.2 Escalating Issues and Risks

The diagram below depicts the progressive nature of risk and issue management starting with “work”, up to a “Project”, all the way through and up to “Enterprise Strategic Leadership”. The PMO and all projects will follow strict escalation procedures for issue and risk management.



Escalation Path

Escalation Level	Description	Escalation Threshold
Project Manager / Governance	<p>Project Managers must seek to resolve the initial issue or risk.</p> <ul style="list-style-type: none"> In Item Tracker, the PM will set the owner of the issue or risk to him or herself. <p>The Project Governance team (usually Business Delivery Liaison, Technical Delivery Owner, Project Vendor Owner, etc.) must seek to resolve the issue or risk in coordination with the Project Manager.</p> <ul style="list-style-type: none"> In Item Tracker, the PM will set the owner of the issue or risk to the appropriate PMO Project Governance resource. In Item Tracker, the PM will set the escalation path of the issue or risk to the Project Governance. <p>Place a comment in the detailed description field stating that the issue has been escalated.</p>	<p>High Escalate immediately</p> <p>Medium 3 business days</p> <p>Low 5 business days</p>

Escalation Level	Description	Escalation Threshold
Project Ownership	<p>The Project Governance team must seek to resolve the issue or risk in coordination with the Project Manager.</p> <ul style="list-style-type: none"> • In Item Tracker, the PM will set the owner of the issue or risk to the appropriate Program Ownership resource. • In Item Tracker, the PM will set the escalation path of the issue or risk to the Program Ownership. • Place a comment in the detailed description field stating that the issue has been escalated. 	<p>High Escalate immediately</p> <p>Medium 3 business days</p> <p>Low 5 business days</p>
Program Leadership Team	<p>If the PMO Program Ownership team cannot resolve the issue or risk, the issue or risk will be escalated to the Program Leadership Team.</p> <ul style="list-style-type: none"> • In Item Tracker, the Program Manager will set the Owner of the issue or risk to the appropriate Program Leadership Team member. In Item Tracker, the Program Manager will set the escalation path of the issue or risk to the Program Leadership. • Place a comment in the detailed description field stating that the issue has been escalated. 	<p>High Escalate immediately</p> <p>Medium 3 business days</p> <p>Low 5 business days</p>
Executive Steering / Enterprise Strategic	<p>If Program Leadership cannot resolve the issue or risk, the issue or risk will be escalated to the BIC Enterprise Strategic Team and/or Executive Steering Committee. The Enterprise/Executive team will seek to resolve escalated issues and risks with Program Leadership, as well as seek input from other State Agencies and external organizations, as needed.</p> <ul style="list-style-type: none"> • In Item Tracker, the PMO Manager will set the owner of the issue or risk to the appropriate Enterprise/Executive member. • In Item Tracker, the PMO Manager or Program Manager will set the escalation path of the issue or risk to Enterprise/Executive. • Place a comment in the detailed description field stating that the issue has been escalated. 	<p>High 1 business day</p> <p>Medium 2 business days</p>

2.5.1.3 Reporting Issues and Risks

Item Tracker standard and custom views will be used to display issues and/or risk lists (project or program level). Once a list is displayed, print the list (to a printer or as a .pdf).

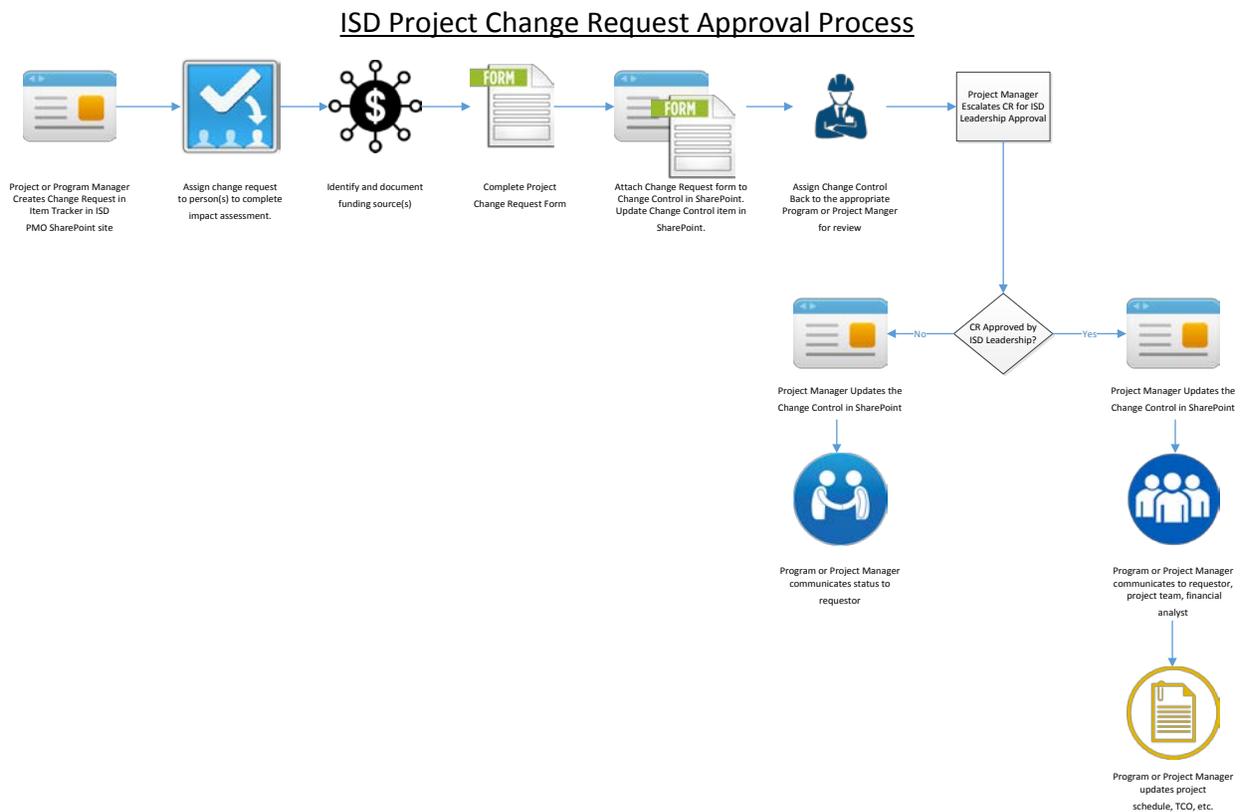
2.5.2 Change Management

Change management is the systematic and explicit approach used to manage approved scope and requirements. Change Requests are documented and acted upon similar to Issues and Risks. Once the change request is approved by the appropriate project stakeholders, the change will be implemented as a change to a project’s scope, schedule and/or cost.

Issues, risks, and change requests are managed in the ISD PMO SharePoint Item Tracker.

- Program Leadership will approve all release related cost and de-scoping changes, and any schedule changes.

Below is the diagram showing the ISD PMO approval process for project Change Requests that affect scope/requirements, schedule, cost, or contract.



2.5.2.1 PMO Project Change Request Approval Process

- When a change to project Scope, Schedule, or Cost (including vendor Contract modification) is identified, the Program or Project Manager creates a Change Request in Item Tracker on the ISD PMO SharePoint site.
- The Change Request is assigned to an individual or team to analyze the impact of the change. Results of the analysis are documented using the ISD PMO Change Request Form (PM 0014)
 - Identify potential funding sources and document funding, or lack thereof, in the Change Request Form
 - The completed Change Request Form is attached to the Change Request in Item Tracker
 - General information about the Change Request is updated in Item Tracker
 - The Change Request is assigned back to the Program or Project Manager for review.
- The Program or Project Manager evaluates the analysis to determine next steps.
 - If analysis identifies impact to Scope, Schedule, or Cost, a Change Request is created and escalated for ISD Leadership review and approval.
 - The Change Request includes updated scope statements, schedule milestones or tasks, and cost information where appropriate.
- The Program or Project Manager updates the Change Request in Item Tracker with results of the governance review.
 - For Rejected/Deferred/Escalated Change Requests, the Program or Project Manager:
 - Documents reason for rejection/deferral/escalation in the Change Request in Item Tracker
 - Moves item to appropriate new status (e.g. Closed or Deferred)
 - Communicates status to requestor
 - For Approved Change Requests, the Program or Project Manager:
 - Documents approval in the Change Request in Item Tracker
 - Communicates status to requestor and project team
 - Updates project plan and related documents and re-baselines project schedule.
 - Moves item to Closed status

2.6 Time Management

All Project team members on projects for which cost should be tracked versus budget (to support APDs, Grants, etc.) must officially report effort on the standard Monday through Friday work week.

2.6.1 Collecting Project Time

Time for project effort should be collected in one of two places.

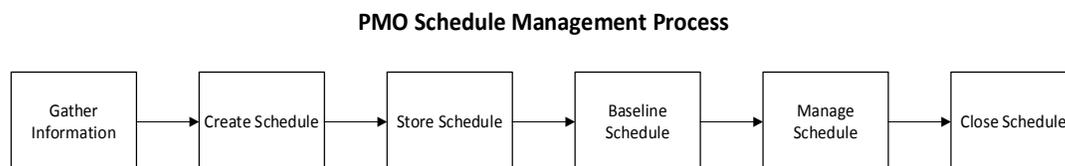
- If assigned as a resource to a project in Changepoint, the resource should enter time in Changepoint against that project. Various reports can be used to summarize effort by resource.
- If not assigned as a resource to a project in Changepoint (e.g., some State of Michigan resources), time should be collected via the State's Data Collection and Distribution System (DCDS). The PMO's assigned Financial Specialist will assist with setting up the proper codes in DCDS to track effort.

2.7 Schedule Management

Overview

Schedule management provides the guiding principles for creating, managing, and executing the project schedules. Schedule management ensures the project team achieves the projects objectives. This enables the Project Managers to make the best informed decision regarding the project's state of progress.

Process Illustration



2.7.1 Objectives and Directives

The Program Manager uses the information in the schedule to make informed decisions surrounding each project in the PMO. The following applies to all projects under the PMO.

- Gather key information needed to start the project schedule.
 - Scope
 - Tasks and milestones
 - Mandatory dates
 - Task durations and milestone dates
 - Available resources
 - Estimated effort

- State Holiday schedule
- Resource time off
- Constraints

- Create the project schedule in Changepoint and/or MS Project
 - Use a project schedule template as a base
 - Tailor the template to fit the specific needs of the project
 - SOM holidays are flagged as non-working on the calendar
 - Resource vacation days are indicated on the calendar

- Store the project schedule in the appropriate repository

- Baseline the project schedule when all milestone dates are approved

- Manage the project schedule during project execution
 - At least weekly
 - Update task % Complete for tasks in progress
 - Update task Status for key tasks and milestones
 - Weekly, provide status of milestone tasks and overall schedule to the PMO Program Manager
 - Approved Change requests could modify task dates (baseline and actual)

- Close the project schedule once all tasks are completed

2.7.2 Project Schedule Template

Multiple project schedule templates will be available for projects to use as a starting baseline for the different types of PMO business projects as well as technical projects in both Microsoft Project and Changepoint. Please see the PMO Schedule Management Specialist for additional details on project schedule templates.

2.7.3 Weekly Schedule Management Activities

The following is a representation of weekly activities related to Schedule Management within the PMO. It is important these procedures be followed in order to control the Projects within the PMO so that leaders can easily determine status and be proactive about items/areas that need attention.

Schedule Management Critical Weekly Activities				
Monday	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> Each Program Manager Updates Program Dashboard based on Project 4-UP reports Each Program Dashboard is finalized and stored on SharePoint. 	<ul style="list-style-type: none"> Create PMO Dashboard based on each Program Dashboards PMO and Program Dashboards are Available for Review in Ownership and Leadership meetings. 			<ul style="list-style-type: none"> PMs Update Issues, Risks, Change requests PMs Update Project Schedules PMs Create Project 4-UP reports

Each Program Manager Updates Program Dashboard based on Project 4-UP reports – Every Monday (COB) each Program Manager is responsible for using the milestone information from Project 4Up reports to update the Program 4-UP Reports and Dashboards. These Program 4-Up Reports and Dashboards are stored on the PMO SharePoint site.

New PMO Dashboard Created – Every Tuesday, the PMO Manger is responsible for creating the current week’s PMO 4-UP Report and Dashboard. This is stored on the PMO SharePoint site.

Program Milestone Dashboard Reviewed with Program Ownership and/or Leadership – Every Tuesday/Thursday the Program Milestone Dashboard will be reviewed with Program Ownership and/or Leadership. The content of the Dashboard will be from the previous week’s Dashboard (completed on Monday).

PMs Updates Issues, Risks, Change requests – Every Friday (COB), PMs will be responsible for updating Issues, Risks, and Change Requests in SharePoint for their projects.

PMs Updates Project Schedules – Every Friday (COB), PMs will be responsible for updating their project schedules for their projects, paying special attention to ensure milestone information is accurate. Any milestones that are yellow or red will require further explanation in their 4Up project status report – either via logged issue, risk, or comment on one of the other sections in the report.

PMs Creates Project 4-Up Report – Every Friday (COB), PMs will be responsible for creating 4-Up Reports for each of their projects. The 4-Up reports will be stored in their respective project folder. Based on milestone statuses and the impact of issues, risks and changes to the project, the overall status (Green, Yellow, and Red) will be assigned. See Performance Measurement Plan section below on criteria for determining overall project status.

2.8 Performance Measurement Plan

The ISD PMO will institute performance measurements for each project. Measures are collected, analyzed, or statistically controlled. Within this plan, metrics/data elements are identified that will be collected or both collected and analyzed. Items “collected” include metrics data gathered for an organization, placed in a repository for historical purposes and used later.

An example of an item to be “collected and analyzed” is estimated vs. actual start and end dates used to track, analyze and report conformance to schedule. All items that should be “statistically controlled” are listed here.

The program will use the following SOM required measurements as Analysis Triggers.

Criteria	Green	Yellow	Red
Schedule Variance	The schedule indicates the major milestones are on schedule	The schedule indicates that one or more of the major milestones will be missed by $\leq 20\%$ of phase duration	The schedule indicates that one or more of the major milestones have been missed or will be missed by $> 20\%$ of phase duration
Cost Variance	The variance between the budget and actual costs is $\leq 10\%$	The variance between the budget and actual costs is $> 10\%$ and $\leq 20\%$	The variance between the budget and actual costs is $> 20\%$
Test Progress	The percent completion of planned test execution minus percent completion of actual Test Execution $< 20\%$	The percent completion of planned test execution minus percent completion of actual Test Execution $\geq 20\%$ and $< 30\%$	The percent completion of planned test execution minus percent completion of actual Test Execution $\geq 30\%$ or after surpassing 75% of the planned test duration, the percent completion of planned test execution minus percent completion of actual Test Execution $\geq 20\%$
Earned Value Schedule Variance (SPI) (If using Earned Value)	$.9 \leq SPI \leq 1.2$	$.8 \leq SPI < .9$ or $1.2 < SPI$	$SPI < .8$
Escalated Issues / Risks	Issues and Risks have a documented Mitigation Plan and are on target.	Escalated Issues or Risks, designated as critical or high priority, remain unresolved for more than one week after the target date, resulting in a high level of risk to the project. Issues and Risks do not have a documented Mitigation Plan.	Escalated Issues or Risks designated as critical or high priority, remain unresolved for more than two weeks after the target date, resulting in a high level of risk to the project. Critical or high Issues and Risks do not have a documented Mitigation Plan.
Testing Defect Rate	The planned test cases / scenarios have a defect rate of 15% or less	The planned test cases / scenarios have a defect rate $> 15\%$ and $\leq 20\%$	The planned test cases / scenarios have a defect rate $> 20\%$

State of Michigan
Michigan Department of Health and Human
Services - Business Integration Center



Integrated Service Delivery Phase 1 (FY17)

Updated Program Charter

State of Michigan
Integrated Service Delivery (ISD)
Program Charter

A. General Information

Project ID/Acronym:	Integrated Service Delivery (ISD)	Date:	11/15/2016
Controlling Agency:	MDHHS	Modification Date:	12/29/2016
Prepared by:	Lesa Schreier	Authorized by:	Amy Hundley Jamy Hengesbach Phillip Bergquist

1. Privacy Information

This document may contain information of a sensitive nature. This information should not be shared with persons other than those who are involved with this system/project or who will become involved during its lifecycle.

2. Revision History

Revision Date	Author	Section(s)	Summary
11/15/2016	Kevin Adler	All	Initial Draft of Updated Program Charter (all sections carried over from prior Program Charter)
12/5/2016	Kevin Adler	D	Added a section for Business Readiness
12/9/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.
12/16/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.
12/22/2016	Kevin Adler	C, D, E, F, G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.

Revision Date	Author	Section(s)	Summary
12/29/2016	Kevin Adler	G	Enhancements to program objectives, scope, assumptions, constraints based on ISD Planning sessions.

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B. Purpose

The program charter is the first step in the State's project management methodology and formally initiates project activities through authorization by the project sponsor. The program charter provides a high-level description of the program and initial program planning estimates.

This Program Charter has been updated to include the precise scope, schedule, and cost estimates for Integrated Service Delivery (ISD) Phase 1 (FY17).

C. Agency Goals and Business Needs

The lists below identify the *agency goals* and *business needs* of the Integrated Service Delivery (ISD) program.

1. Agency Goals

Integrated Service Delivery (ISD)

- Create a portal that focuses on holistic, proactive, and preventative services and outcomes.
- Create a service support structure that helps achieve person-centric outcomes, which enable customers to access self-service resources, community partners, and specialized case workers.
- Create a platform for relationship management and success plan support that utilizes success coaching strategies as the basis of customer interactions.
- Develop a system that orients solutions toward solving root causes rather than symptoms.

Universal Caseload (UCL)

- Increase in case management efficiency through task repetition, specialization, and through virtual management of resources.
- Create a system that supports task-oriented case management, virtual workforce management, and advanced performance metrics, which are configurable by the local office users (i.e., County or Virtual Office), Business Service Center (BSC) Managers, the Central Office, or by other roles yet to be determined.
- Develop a targeted training program whereby newly hired staff benefit from skills-based training modules and progress to a new task once a new skill has been mastered.

Contact Center (CC)

- Develop a statewide contact center that functions as a first contact support center, providing self-service functionality and striving to be the primary support interface between a customer, their benefits, and their case management resources.

Supporting Systems (Technology Modernization)

- Consolidate agency portals, registries, and call center services to provide a more uniform and consistent customer experience that is strategically aligned.

- Modernize existing enterprise systems to afford the ability to interact with data in a streamlined portal and to provide access to information held outside the department. Efforts include the following:
 - Incorporation of trusted data sources from inside and outside the department through the Master Person Index (MPI)
 - Utilize existing Enterprise Service Buses (ESB)
 - Consolidate the current communication technologies to streamline information sharing

2. Business Needs

Integrated Service Delivery (ISD)

- The creation of a modular system whereby person-centric modules can be constructed and added on as defined by strategic priorities
- Develop a portal that is the integration point for MDHHS programs and services, including integration with the Universal Caseload system and Contact Center.
- Development of a holistic application and needs assessment that connects customers with supports that address their needs and help develop a plan aimed at improving a customer’s overall stability.

Universal Caseload (UCL)

- The elimination of the single casework owner barrier to effectively distribute work across local offices and other geographic regions.
- Eliminate case worker tasks that can be provided by other self-service mechanisms.

Contact Center (CC)

- Create a statewide contact center that integrates with the Universal Caseload system, which enables information sharing to resolve cases in real-time (i.e., one-call resolution).
- Develop a system whereby case workers are freed up from responding to inquiries for things that could be handled by an automated self-service system.

Supporting Systems (Technology Modernization)

- Develop an infrastructure that supports the Integrated Service Delivery platform Universal Caseload system, and Contact Center where the following can be achieved:
 - A common profile that can be accessed by each system
 - Data Sharing
 - Communications Management

D. High Level Project Description

Integrated Service Delivery (ISD) is a new concept to the State of Michigan which fundamentally changes the way people access public benefits and community resources to support their personal goals.

Integrated Service Delivery incorporates three components for FY17; an Integrated Service Delivery Portal (available through MiPage), Universal Caseload with the associated Contact Center, as well as a general third category for all of the underlying components which will need to be improved in order to support Integrated Service Delivery, commonly referred to as supporting services.

1. Integrated Service Delivery (ISD) Portal

The ISD Portal will provide an intuitive experience that allows community resources, success coaches, MDHHS staff and program applicants and participants the ability to electronically participate in self-service change reporting, personal needs assessment, single point of application for public Health and Human Service benefits, and viewing of existing benefits. The ability to maintain a common profile of individual information used across programs which supplements information through the use of trusted data sources is intended to be a source of beneficiary empowerment.

2. Universal Caseload

Universal Caseload (UCL) creates a task based casework process focused on work routing. Since there is no single case owner, the work force can be maximized to re-direct people to particular tasks increasing efficiencies and is customizable at the local level. Universal Caseload is anticipated to provide workload tracking and reporting, which will result in improved customer service.

3. Contact Center for One Call Resolution

The Contact Center (CC) will be organized to support Universal Caseload for some programs and functions administrated in the Bridges system using predictive analytics to route calls to the appropriate group of experts for one call resolution.

4. Supporting Tasks

In order to support Integrated Service Delivery, existing systems will be added to the MPI (Master Person Index) to serve as Trusted Data Sources (TDS). Data will be made available over an improved enterprise bus for integration through common services provided by exiting systems of record. MiLogin will be used to identity-proof end users.

5. Strategic Alignment

As part of this charter, it is beneficial to identify the MDHHS strategic direction with regard to Portals, Universal Caseload (UCL), and Contact Center (CC):

Overall:

- Integration of program delivery around a person's holistic needs.

Portals:

- MDHHS currently supports several public facing and internal portals where program specific information can be entered and/or viewed. In the future, requests for "portal" functionality from business areas will be evaluated for inclusion in the Integrated Service Delivery Portal.
- Requests for portal functionality determined to align with the ISD Portal will be added to the ISD work queue.
- Requests for portal functionality determined not to align with the ISD Portal, and for which portal functionality already exists and will continue to be used, will be directed to the appropriate Program Management Office (PMO).
- Requests for portal functionality determined not to align with the ISD Portal, and for which portal functionality does not exist, will be designed using the MDHHS Integration Guide so that the new portal is accessible through the ISD Portal as a module of functionality.
- In the future, existing portals will be incorporated into the ISD Portal during large maintenance tasks or functional upgrades.

Universal Caseload (UCL):

- MDHHS currently utilizes case workers who own their caseloads from beginning to end. The caseworker is the beneficiary's single point of contact.
- In the future, task-oriented case management will be utilized and case workers will not own specific cases. Instead, the case work will be performed by a multitude of individuals with the common skills to address whatever questions/issues arise. Work will be distributed among offices/geographic areas on a task-based need.
- Strategic reporting will be created to measure workload tracking and improve the beneficiary experience.

Contact Center (CC):

- MDHHS currently has multiple contact numbers for beneficiaries to call for specific issues.
- In the future, a single point of contact toll-free number will be created and will prompt beneficiaries for specific information and route the call to individuals depending on the expertise needed.
- Strategic reporting will be created to measure the key performance indicators of the contact center to identify areas for improvement regarding one-call resolution, average speed to answer, abandon rate, etc.
- Automated self-service will be available to answer common beneficiary questions which will assist in worker productivity by freeing up the worker for other task based things.

6. Business Readiness

Business Readiness will provide tools and establish activities to help individuals understand and change the way they think about or perform their work in order to support the new or updated systems and processes.

Key Business Readiness activities include the following:

- Aligning key business processes to requirements and technology.
- Communicating with and engaging stakeholders so they are informed and knowledgeable.
- Assessing the impact of the technology, policy and process changes on those who work with consumers, beneficiaries, providers and vendors across the agencies.
- Preparing and training staff members and identified stakeholders to successfully carry out their work with updated systems and processes.
- Workforce transition planning that includes identifying changes to roles and responsibilities as needed.

E. Project Objectives

ISD Portal:

The objectives of the ISD Portal include the following:

- 1) The ISD Portal project will gather detailed requirements, design, construct and test the ISD Portal, Needs Assessment, and Holistic Application; such that it is implemented and ready for pilot of release (1) in August 2017, in Muskegon County. The pilot will be released as the first release of a functional product with features described in the scope section of this charter to the county region above with the intent of learning how a large-scale rollout might work in practice.

Release 1 in August 2017 focuses on addressing the ISD Portal and Needs Assessment functionality. Release 2 in December 2017 focuses on addressing the Holistic Application and self-service functionality. Specific objectives of both releases include the following:

- a. Improve person-centric business processes.
- b. Improve beneficiary/customer empowerment based on a person-centric needs assessment focused on identifying goals, barriers and other impediments in a person's life to improve outcomes.
- c. Develop holistic application, with integration to Bridges.
- d. Build a needs assessment and success planning toolset leveraging an intuitive user interface.
- e. Implement a service support structure that helps achieve person-centric outcomes, enabling customers to:
 - i. Access self-service resources.
 - ii. Change customer profile information.
 - iii. Build success plan.
 - iv. Manage success goals and supporting resources.
 - v. Provide consent for community partner referrals.

- vi. Find community partner resources with or without holistic application.
- vii. Upload documents.
- f. Implement a structure that engages community partners as essential collaborators in service delivery, including providing higher degrees of customer assistance functionality to partner organizations.
- 2) Deliver a technological experience which achieves modernity in terms of design, user interface and intuitiveness. This will result a social media inspired feel.

Universal Caseload (UCL):

The objectives of Universal Caseload include the following:

- 1) Complete a pilot for UCL.
- 2) Complete new infrastructure development pre-implementation to support the UCL system.
- 3) The UCL system design will be modular and will be aligned to meet the standards established in the MDHHS Integration Guide.
- 4) Create standardized business processes throughout the organization to ensure successful integration of UCL into the organization and into other supporting components.
- 5) Create and execute an Operational Readiness program.
- 6) Perform data conversions on applicable cases within the pilot counties.

Contact Center:

The objectives of the Contact Center include the following:

- 1) Complete a Contact Center (CC) Pilot.
- 2) Complete new infrastructure development pre-implementation to support the CC system.
- 3) Create standardized business processes throughout the organization to ensure successful integration of CC systems into the organization and into other supporting components.
- 4) Create and execute an Operational Readiness program.

F. Program Scope

This section identifies those work items that are deemed in- and out-of-scope for the program. Program constraints and assumptions are also listed here.

1. In-Scope

The following activities and functions are considered in-scope for Phase 1 (FY17) of the ISD Program.

- 1) The Integrated Service Delivery (ISD) Portal with support for modular extensibility, centralized messaging capabilities, eligibility enrollment and program integration (for some programs and functions in Bridges), success plan management/needs assessment, and community resource integration/referrals.

- 2) The Universal Caseload (UCL) system with support for task-oriented case management, virtual workforce management, and advanced performance metrics.
- 3) The Contact Center (CC) system with support for self-service capabilities, service optimization (e.g., call list consolidation), and specialized queue management capabilities.
- 4) The development of two Person-Centric Services—the Needs Assessment and Holistic Application—aimed at ensuring accurate identification and management of needs in a success plan, coordination with community partners and resources, and enrollment in department programs.
- 5) Enhancements to supporting systems to ensure the proper integration of the Integrated Service Delivery (ISD) Portal, Universal Caseload (UCL), and Contact Center (CC) systems and to establish a data sharing model through addition or modification of Trusted Data Sources (TDS).
- 6) The development and execution of an Business Readiness/Communication Plan and associated staff training program.

2. Out-of-Scope

The following activities and functions are excluded from the scope of this project:

ISD Portal:

- 1) Enrollment into a Managed Care Plan.
- 2) Selection of a Primary Care Physician.
- 3) Integration with MS Outlook calendar.
- 4) Integration with News feeds.
- 5) Information specific to a *customer* from 2-1-1 trusted data source.
- 6) Non-MAGI eligibility determination.
- 7) Intetgration with Live Chat functionality.
- 8) myHealth Portal is not being replaced.
- 9) Childcare Database (of Childcare providers) will not be integrated.

Universal Caseload:

- 1) Any new enhancements identified during the UCL Pilot will be planned as part of future phases of the ISD Program.
- 2) Support for customer self-service capabilities via integration with the ISD Contact Center (CC), such as the ability to update case information through the IVR tool. This would continue to be done by a caseworker.

Contact Center:

- 1) Inclusion of new or existing MDHHS contact centers into the ISD CC
- 2) Support for customer self-service capabilities, such as the ability to update case information through the IVR tool. This functionality would continue to be done by a caseworker.
- 3) 3rd party translation service integration (i.e., Language Link)
- 4) Interactive chat functionality between customers and staff
- 5) The ability to solicit customer satisfaction feedback via phone survey.
- 6) Workforce Management which provides the ability to project seasonal call volumes and to manage workforce respectively.
- 7) Text and Short Messaging Service (SMS) messaging both inbound and outbound.

3. Assumptions

The list below identifies the assumptions made regarding this program:

- a. Business owner(s) will be accountable for the scope and delivery of functions to the end-users.
- b. The State of Michigan SUITE Agile and Waterfall processes will be used as appropriate.
- c. Work required to implement the ISD Portal (including the Needs Assessment and Holistic Application), Universal Caseload, and Contact Center, but done by groups outside the ISD Program teams, will be completed on a mutually agreeable schedule.
- d. All additional development and implementation beyond the ISD Portal, UCL, and Contact Center pilots will require additional funding.
- e. Delivery of the UCL pilot will coincide with the delivery of the Contact Center pilot.
- f. There are regular reporting updates for grants and Federal requirements.
- g. Any necessary waivers from FNS and other Federal agencies will be made available to support the development of the portal components.

4. Constraints/Risks

The list below identifies the constraints identified regarding this program:

- a. Completing the purchasing activities on time is vitally important to keeping the project on schedule.
- b. This program requires dedicated Subject Matter Experts (SMEs), Community Partners, and other staff to complete analysis, requirements, development, testing, and training tasks.
- c. It is anticipated that this project will impact existing prioritized projects within Program Management Offices (PMOs), vendors, and other business units (i.e., DTMB).
- d. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.
- e. The overall process time to identify and implement agreements with Trusted Data Sources (TDS) and get the corresponding service stood up.

G. Initial High-Level Project Planning

1. Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

[ISD Budget Worksheet](#)

2. Estimated Scheduling Dates

Anticipated Start Date:	January 3, 2017
Target Completion Dates:	
ISD Portal Pilot (Release 1) <i>Includes the ISD Portal, Needs Assessment, and Success Plans</i>	August 31, 2017
ISD Portal Pilot (Release 2) <i>Includes the Holistic Application and Self-Service Features</i>	December 31, 2017
Universal Caseload Pilot	December 29, 2017
Contact Center Pilot	December 29, 2017

A weekly dashboard will track the status of key tasks and activities of this program throughout phase one with corrective action plans implemented to keep the program on track to meet the target completion date.

H. Project Authority

Authorization:

Jamie Hengesbach – Business Owner

Amy Hundley – Business Owner

Phillip Bergquist – Business Owner

Brant Cole – Business Delivery Liaison

Judy Odett – Technical Delivery Owner

Kevin Adler – ISD PMO Manager

I. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:

[ISD Roles & Responsibilities Document](#)

Project Governance

Refer to the ISD PMO Governance diagram at the following link:

[ISD Program Governance Document](#)

J. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks.

Please refer to [BIC ISD Program Management Plan](#) for a list of all these processes.

K. Approval Information

By signing this document you agree to this as the formal charter statement to begin work on the program described within and the commitment of the necessary resources (budget, personnel, etc.) to complete it.

Approval Signatures

Name/Role	Signature	Date
Amy Hundley Business Owner – Field Operations		
Phillip Bergquist Business Owner – Policy & Legislative		
Jamy Hengesbach Business Owner - Medicaid		
Kevin Adler Program Manager		



Integrated Service Delivery (ISD)

ISD Portal Project Charter

**State of Michigan
Integrated Service Delivery (ISD) Portal
Project Charter**

A. General Information

Project ID/Acronym:	ISD Portal	Date:	12/8/2016
Controlling Agency:	MDHHS	Modification Date:	1/06/2017
Prepared by:	Thomas Manzagol	Authorized by:	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Business Integration Center – PMO Program Charter and follows the processes set forth in the BIC Project Plan.

[Updated ISD FY17 Program Charter](#)

Change Control

Revision Date	Author	Section(s)	Summary
12/6/2016	Thomas Manzagol	All	Initial Draft

Revision Date	Author	Section(s)	Summary
12/12/2016	Thomas Manzagol	Purpose, Objectives, Scope, Assumptions, Constraints, Risks, Estimated Scheduling Dates, Summary Milestone Timeline	Added changes from 11/30/2016 Business Owner Discussion on ISD portal, as well as notes from meetings with Deloitte Consulting PM and Phillip Bergquist on 12/9/2016.
12/13/2016	Thomas Manzagol	Scope, Risk, Assumptions, Summary Milestone Timeline	Based on integration and requirements meeting input on 12/13/2016.
12/16/2016	Thomas Manzagol, Manoj Zutshi	All	Changes based on comprehensive internal review with Kevin Adler, Manoj Zutshi and Larry Wildt.
12/20/2016	Thomas Manzagol,	All	Meeting with Strategic Integration Team, and inputs from first management review.
12/22/2016	Thomas Manzagol	Scope, Scheduling Dates, Summary Milestone Timeline	Inputs from Deloitte on Sprint Schedule, and further refinements from Strategic Integration Team
12/27/2016	Thomas Manzagol	Project Objectives, Assumptions	Added further definition to the term pilot.
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/28/2016	Thomas Manzagol	All	Changes from John Dullock, Karen Parker, and Linda Pung
12/29/2016	Thomas Manzagol	All	Final review edit
1/5/2017	Thomas Manzagol	Estimated Scheduling Dates, Summary Milestone Timeline, Project Objectives, Project Scope	Based on inputs from Manoj Zutshi
1/6/2017	Thomas Manzagol	Project Scope, Summary Milestone Timeline	Based on inputs from Thomas Rony, and Cynthia Edwards
1/23/2017	Thomas Manzagol	Final formatting	Final Version

B. Project Purpose

The Integrated Service Delivery (ISD) Portal provides an intuitive experience that allows community partners, program applicants and program participants the ability to electronically participate in self-service change reporting, personal needs assessment, single point of application for public Health and Human Service benefits, and ability to view existing benefits with renewal dates. The ability to maintain a secure, common profile of individual information used throughout a holistic application process with needs assessment supporting community partner and State of Michigan (SOM) program recommendations to be a source of beneficiary empowerment.

The business objective of the ISD portal is to improve user experience based on person-centric design and services by providing links to existing MDHHS programs and community resources, and by developing an ISD Portal that provides a needs assessment, success planning, and a holistic application.

C. Project Objectives

The objectives of this project include the following:

1. The ISD Portal project will gather detailed requirements, design, construct and test the ISD Portal, Needs Assessment, and Holistic Application; such that it is implemented and ready for pilot of release (1) in August 2017, in Muskegon County. The pilot will be released as the first release of a functional product with features described in the scope section of this charter to the county region above with the intent of learning how a large-scale rollout might work in practice. Release 1 focuses on addressing the ISD Portal and Needs Assessment functionality, with Release 2 in December 2017 focused on the Holistic Application functionality. Specific objectives of both releases include the following:
 - a. Improve person-centric business processes.
 - b. Improve beneficiary/customer empowerment based on a person-centric needs assessment focused on identifying goals, barriers and other impediments in a person's life to improve outcomes.
 - c. Develop holistic application, with integration to Bridges.
 - d. Build a needs assessment and success planning toolset leveraging an intuitive user interface.
 - e. Implement a service support structure that helps achieve person-centric outcomes, enabling customers to:
 - Access self-service resources.
 - Change customer profile information.
 - Build success plan.
 - Manage success goals and supporting resources.
 - Provide consent for community partner referrals.
 - Find community partner resources with or without holistic application.
 - Upload documents.

- f. Implement a structure that engages community partners as essential collaborators in service delivery, including providing higher degrees of customer assistance functionality to partner organizations.
2. Deliver a technological experience which achieves modernity in terms of design, user interface and intuitiveness. This will result a social media inspired feel.

D. Project Scope

This project inherits the high-level program scope of the ISD FY '17 [RT1]Program [MT2]Charter, Section F. Project scope specific to ISD Portal, Needs Assessment and Holistic Application have been listed here for completeness:

In-Scope:

ISD Portal (Release 1)[RT3][MT(4)]

- a. Implement an ISD Portal that will provide basic information on MDHHS programs to general public and do not require a login to access.
- b. Integrate the Portal with MiLogin.
- c. Implement an ISD Portal that supports customer access through multiple devices and browsers, with a special emphasis on mobile devices.
- d. Implement an ISD Portal that incorporates the “Needs Assessment” functionality (allows the customer to identify their needs and connect them with community partner resources).

Needs Assessment (Release 1)

- a. Implement a Success Plan tailored to the beneficiaries needs, linked to applicable community resources.
- b. Integrate Links to existing Program Applications and Community Partners.
- c. Integrate shared business rules to understand needs assessment input, and responsively recommend supportive resources.
- d. Integrate with the 2-1-1 for community resources database (for access to available geographic resources).
- e. Provide recommendation on programs and services based on input from needs assessment. Needs assessment will recommend those SOM and Community Partner programs that the customer may benefit from.

Holistic Application (Release 2)

- a. Implement a holistic application for all of the programs administered in Bridges including, but not limited to the following items. Other SOM Programs will be prioritized in future ISD releases.
 - i. Food Assistance Program (FAP).
 - ii. Health Care Coverage.
 - iii. Cash assistance.
 - iv. State Emergency Relief (SER).
 - v. Child Development and Care (CDC).

- b. Implement functionality that requests information from applicants only when necessary, supplementing and verifying attested information dynamically from trusted data sources.
- c. Implement functionality where applicants have a dynamic interactive experience wherever possible (person-centric interaction based on customer profile information and needs assessment input).
- d. Implement functionality where applicant supplied documents utilize the existing document management system (FileNet).
- f. Integrate with Michigan Trusted Data Sources:
 - i. Bridges demographic and current benefits information.
 - ii. CHAMPS[MT(5)] Health Plan enrollment data.[RT6]
- e. Implement an ISD Portal that includes the Holistic Application functionality (adds error checking and data pre-population for existing beneficiaries).
- f. Integrate shared business rules between Needs Assessment, Holistic Application and Supporting Services.[MT(7)]
- g. Self-Service Features:
 - i. Customer profile management.
 - ii. Change reporting.[MT(8)]
- e. Self-Service Features:
 - i. Redetermination.
 - ii. View current benefits and past referrals[RT9][MT(10)][MT(11)].
 - iii. Document uploads.
 - iv. Consent management for sharing data with partner organizations.

General

- a. Includes maintenance and help desk support provided for the ISD Portal pilot.
- b. Provide ADA compliant user interface.
- c. Provide language support for Spanish and Arabic.
- d. Provide compliance with Federal Limited English Proficiency (LEP) requirements.
- e. Integrate Short Message Service (SMS) messaging and e-mail.
- f. Integrate with Master Person Index (MPI).
- g. Leverage the Maximus call center to support customer calls on the operational use of the ISD Portal, Needs Assessment, or Holistic Application.

Supporting Services (ISD Portal, Holistic Application and Needs Assessment)

Eligibility PMO

- 1) Support recreation of MiBridges self-service functions in the ISD Portal including:
 - a. Change reporting.
 - b. Redetermination.
 - c. Check my benefits.
 - d. Customer profile management.
 - e. Document uploads.
- 2) Make customer eligibility and enrollment data available [MZ12] to the ISD Portal.

- 3) Make customer eligibility and enrollment data available through the Master Person Index (MPI).
- 4) Establish and support the new infrastructure environments.
- 5) Enhance the Enterprise Services Bus to interface supporting systems, such as Bridges, with ISD Portal, Holistic Application and Needs Assessment.
- 6) Integrate existing MAGI Eligibility Determination Service to function **interactively** [MT(13)[RT14][MT(15]with the Holistic Application.
- 7) Integrate Bridges to intake Holistic Applications as it functions today for other applications from MiBridges.

Enterprise

- 1) Integrate ISD Portal with MiLogin and MPI.
- 2) Load the following two data sources into the MPI
 - i. Bridges
 - ii. CHAMPS
- 3) Integrate Helping Hand 2-1-1 information to be used within the ISD Portal for Needs Assessment and success plan.
- 4) Integrate Eligibility and Enrollment data to be used by the ISD Portal, Needs Assessment and Holistic Application.
- 5) Implement the FileNet Document Upload functionality
- 6) Integration with MiPage.
- 7) Support connections with existing MDHHS functionality, as required.

MMIS

- 1) Making customer program enrollment data available to the ISD Portal.
- 2) Making customer program enrollment data available to the Master Person Index (MPI).

Out-of-Scope:

1. Enrollment into a managed care plan.
2. Selection of Primary Care Physician.
3. Integration with MS Outlook calendar.
4. Integration with News feeds.
5. Information specific to a customer from 2-1-1 trusted data source.
6. Non-MAGI eligibility determination.
7. Integration with Live Chat functionality.
8. myHealthPortal Portal is not being replaced.
9. Childcare Database (of Childcare providers) will not be integrated.

Assumptions:

1. Business owner(s) will be accountable for the scope and delivery of functions to the end-users.
2. **The State of Michigan SUITE process will be used and Agile and vendor software development methods will be integrated in accordance with SUITE Agile Process Guide, dated January**

3. Work required to implement the ISD Portal, Needs Assessment, and Holistic Application, but done by groups outside the ISD Portal team, will be completed on a mutually agreeable schedule.
4. Supporting PMO schedules will be aligned to support this effort.
5. The MDHSS Civilla application pilot will provide the business requirements for the basis of the Holistic application.
6. Community partner access to customer success plan information will be based on consent management rules defined by the business.
7. Community partners will continue to register their resource data through existing 2-1-1 registry process.
8. The Business Owner is accountable for prioritizing user stories across sprints based on the Delivery team's capacity.
9. There are regular reporting updates for grants and Federal requirements.
10. Additional user requirements and future enhancements identified during the pilot will be documented for potential future development.
11. Project is dependent on completion and lockdown of Civilla application by February 15, 2017 (or appropriate sprint cycle date).
12. Any necessary waivers from FNS or other Federal Agencies will be made available to support the development of the portal components.

Constraints:

1. Solution Design Team (SDT) final design approval does not take place until start of second Sprint Cycle.

Risks:

1. If the SOM requires the use of the state supported project management software, as opposed to the vendor proposed Agile software development toolset, there is a system security risk for vendor offshore development team access.
2. Pilot timeline requires concurrent solution development, hardware installation, EASA, and Sprint Development.
3. SDT process and final EASA packet approval occurs concurrently with Sprint 1 development – may create further design modifications to Sprint 1 code during Sprint 2.
4. Concurrent SDT, EASA, Hardware Implementation and Sprint development may extend to last sprint cycle to address architecture changes.
5. Potential impact if one, or more policy changes are required to implement the project.
6. The overall process time to identify and implement agreements with Trusted Data Sources, and other impacted systems and get corresponding services stood up.
7. Business agreements, contracts and access to technical resources required to interface with Trusted Data Sources and other third party applications, databases, ESBs, portals and registries.
8. Provisioning Bridges timeline for development, quality and user test environments could delay Sprint development cycles.

E. Project Critical Success Factors

Project critical success factors include:

1. All in scope items delivered on-time and within budget.

F. Initial High Level Project Planning

Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

[ISD Budget Worksheet](#)

Estimated Scheduling Dates

Anticipated Start Date: January 3, 2017

Target Completion Date: December 31, 2017

The ISD Portal project will be constructed in two releases. The release dates are as follows:

- Release 1: 8/31/2017
- Release 2: 12/31/2017

Release 1 of the ISD Portal project consists of nine (9) Agile development sprint cycles culminating in nine (9) iterative UAT cycles and a single one-county pilot. Throughout the release 1 construction period, development work will also continue on Holistic Application, in addition to ISD Portal and Needs Assessment.

Key milestones include the following:

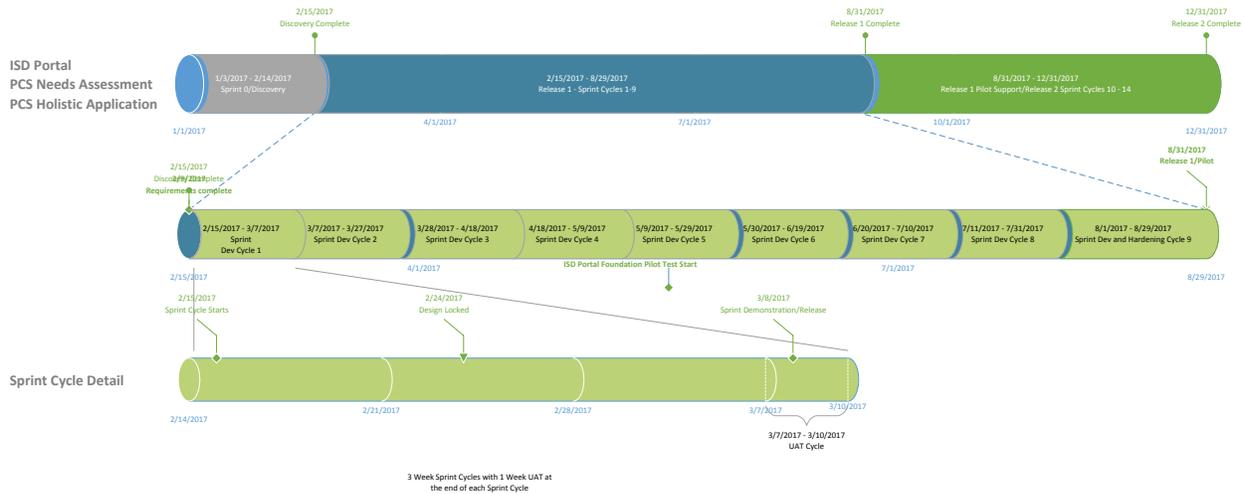
Submission of initial EASA Packet	12/19/2016
Sprint 0 Discovery complete	2/14/2017
Civilla application template locked down	2/15/2017
Sprint 1: Complete/UAT 1 Starts	3/8/2017
Sprint 2: Complete/UAT 2 Starts	3/29/2017
Sprint 3: Complete/UAT 3 Starts	4/19/2017
Sprint 4: Complete/UAT 4 Starts	5/10/2017
Sprint 5: Complete/UAT 5 Starts	5/31/2017
Sprint 6: Complete/UAT 6 Starts	6/21/2017
Sprint 7: Complete/UAT 7 Starts	7/12/2017
Sprint 8: Complete/UAT 8 Starts	8/2/2017
Sprint 9: Complete/UAT 9 Starts	8/30/2017
Release 1 Completion - Single county pilot roll-out	8/31/2017
Pilot Completion	12/31/2017

Release 2 of the ISD Portal project consists of five (5) Agile development sprint cycles culminating in five (5) iterative UAT cycles. Throughout this construction period, the focus is on extending the Holistic Application development to production release.

Key milestones include the following:

Sprint 10: Complete/UAT 10 Starts	9/26/2017
Sprint 11: Complete/UAT 11 Starts	10/17/2017
Sprint 12: Complete/UAT 12 Starts	11/7/2017
Sprint 13: Complete/UAT 13 Starts	11/28/2017
Sprint 14: Complete/UAT 14 Starts	12/27/2017
Release 2 Completion	12/31/2017

Summary Milestone Timeline [RT18][MT(19)]



G. Project Authority

Authorization:

- Phillip Bergquist** – Business Owner
- Amy Hundley** – Business Owner
- Jamy Hengesbach** – Business Owner
- Brant Cole** – Business Delivery Liaison
- Thomas Manzagol** – ISD Portal Project Manager
- Judy Odett** – Technical Delivery Owner
- Manoj Zutshi** – Deloitte Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:

[ISD Roles & Responsibilities Document](#)

Project Governance

Refer to the ISD PMO Governance diagram at the following link:
[ISD Program Governance Document](#)

I. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks.

Please refer to [BIC ISD Program Management Plan](#) for a list of all these processes.

J. Approval Information

The signatures relay an understanding of the purpose and content of the document by those endorsing it. By signing this document, you agree to this as the formal Charter statement to begin work on the project described within, and commitment of the necessary resources.

Approval Signatures

Role	Name	Signature	Date
Business Owner	Phillip Bergquist Business Owner-Policy & Legislative		
Business Owner	Amy Hundley Business Owner-Field Operations		
Business Owner	Jamy Hengesbach Business Owner-Medicaid		
BIC Project Manager	Thomas Manzagol		
BIC Business Delivery Liaison	Brant Cole		
DTMB Technical Delivery Owner	Judy Odett		
Vendor Project Manager	Manoj Zutshi		



Integrated Service Delivery (ISD)

Universal Caseload (UCL) Pilot

Project Charter

State of Michigan
ISD-Universal Case Load (UCL) – Phase 1
Project Charter

A. General Information

Project ID/Acronym:	Universal Case Load (UCL)	Date:	12/8/2016
Controlling Agency:	MDHHS	Modification Date:	1/20/2017
Prepared by:	Todd Miller	Authorized by:	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Updated ISD FY17 Program Charter and follows the processes set forth in the BIC ISD PMO.

- [Updated ISD FY17 Program Charter](#)

Change Control

Revision Date	Author	Section(s)	Summary
12/8/2016	Todd Miller	All	Initial Draft
12/27/2016	Todd Miller	All	Added additional scope statements.
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/29/2016	Todd Miller	All	Updates to incorporate feedback from stakeholders and executive sponsors.
1/04/2017	Todd Miller	Project Scope	Added detail to Bridges integration and new statement about CC integration.

B. Project Purpose

The Universal Caseload (UCL) project will create a system and associated intelligent workflows that facilitates breaking casework in to logical case functions (e.g., registration, intake, redetermination, change, etc.), which enables tasks to be distributed across local offices and other geographic regions.

The UCL system will allow County offices, Business Service Centers (BSCs), the Central Office, and other designated entities to manage tasks and overall workload (i.e., resources) in real-time. Tasks reports and dashboards will be developed to help drive how the work is managed. As part of an integrated, yet autonomous module of Bridges, the UCL system will integrate with the new ISD Contact Center (CC) and other key State of Michigan (SOM) systems.

The UCL project will gather detailed requirements, design, construct and test the UCL system; such that it is implemented and ready for pilot in January 2018 in Shiawassee and Gratiot counties. The pilot will be released as a functional product with features described in the scope section of this charter to the county regions above with the intent of learning how a large-scale rollout might work in practice.

C. Project Objectives

The UCL Pilot project objectives are described within the Updated ISD FY17 Program Charter, section E. Project objectives specific to UCL have been listed here for completeness:

1. Complete a pilot for UCL.
2. Complete new infrastructure development pre-implementation to support the UCL system.
3. The UCL system design will be modular and will be aligned to meet the standards established in the MDHHS Integration Guide.
4. Create standardized business processes throughout the organization to ensure successful integration of UCL into the organization and into other supporting components.
5. Create and execute an Operational Readiness program.
6. Perform data conversions on applicable cases within the pilot counties.

D. Project Scope

This project inherits the high-level program scope of the ISD FY17 Program Charter, Section F. Project scope specific to UCL has been listed here for completeness:

In-Scope

1. Implement the changes in Bridges necessary to support UCL (e.g., access to case information to create functional tasks).
2. Implement the UCL module in a way that remains autonomous to Bridges.
3. Integrate the UCL solution with Bridges to allow action initiated in UCL to prepopulate Bridges screens (e.g., case status information).
4. Create the UCL system to support task-oriented case management, virtual workforce management, and advanced performance metrics, which are configurable by the local office

users (county or virtual office), Business Service Center (BSC) Managers, the Central Office, or by other roles yet to be defined.

5. Create a UCL system that will support the assignment and redirection of caseworkers to queues to complete tasks within the queue, as well as tasks outside their assigned queue based on the caseworkers' authorization.
6. Create an Operational Readiness program which standardizes caseworkers' business processes around the use of UCL and supporting components, to enhance the adoption of the UCL system, and associated roles-based casework model.
7. Implement integration with the Integrated Service Delivery (ISD) Contact Center (CC) to support skills-based call routing (e.g., supply UCL case function assignments to the Contact Center to enhance the customer's experience with the Interactive Voice Response menu).
8. Implement Integration with the CC system to allow screens to be prepopulated with calling customers' information, when possible.
9. Leverage the Bridges Resource Center (BRC) to support MDHHS staff calls on the operational use of the UCL system.

Supporting Services

1. Eligibility
 - a. Establish and support the new infrastructure environments and batch schedules.

Out-of-Scope

1. Any new enhancements identified during the UCL Pilot will be planned as part of future phases of the ISD Program.
2. Support for customer self-service capabilities via integration with the ISD Contact Center (CC), such as the ability to update case information through the IVR tool. This would continue to be done by a caseworker.

Assumptions

1. The project will adhere to the State of Michigan SUITE waterfall project processes.
2. Work required to implement the UCL system, but done by groups outside the UCL team, will be completed on a mutually agreeable schedule.
3. All additional development and implementation beyond the UCL Pilot will require additional funding.
4. Delivery of the UCL Pilot will coincide with the delivery of the Contact Center Pilot.
5. Caseworkers will continue to use Bridges as their system of record for case management.
6. Bridges data collection and workflow will operate as they do today.

Constraints

1. It is anticipated that this project will impact existing prioritized projects in other PMO's, vendors, and other business units (i.e., DTMB).

Risks

1. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.

E. Project Critical Success Factors

The list below identifies the project's critical success factors:

1. All in scope items delivered on-time and within budget.

F. Initial High Level Project Planning

Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

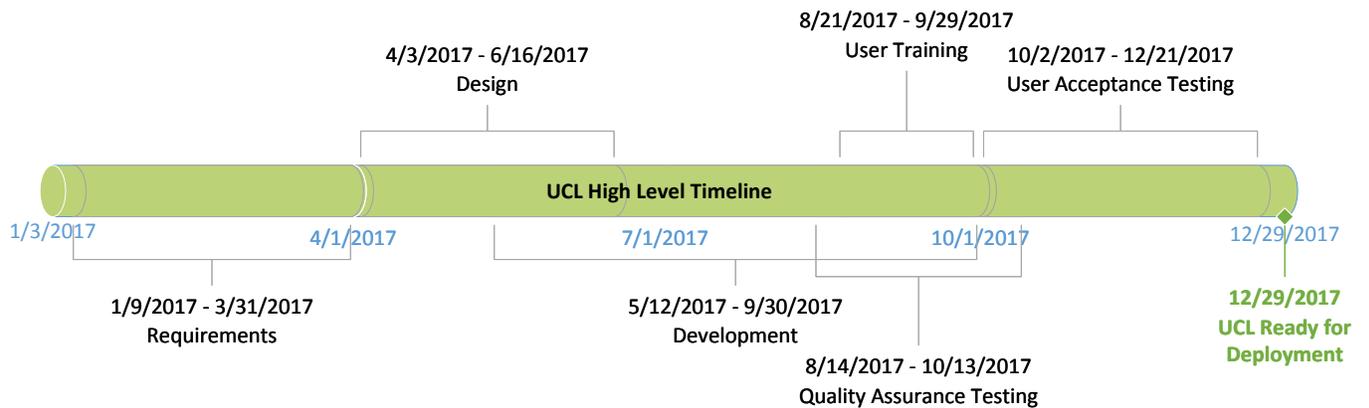
[ISD Budget Worksheet](#)

Estimated Scheduling Dates

Anticipated Start Date: 01/09/2017

Target Completion Date: 12/29/2017

Milestone Timeline:



G. Project Authority

Authorization:

Amy Hundley – Business Owner

Phillip Bergquist – Business Owner

Jamie Hengesbach – Business Owner

Brant Cole – Business Delivery Liaison

Kemal Tekinel – Technical Delivery Owner

Gajendra Prasads (GP) Sankaranarayana – Vendor Project Manager

Todd Miller – BIC ISD UCL Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:

[ISD Roles & Responsibilities Document](#)

Project Governance

Refer to the ISD PMO Governance diagram at the following link:

[ISD Program Governance Document](#)

I. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks. Please refer to [BIC ISD Program Management Plan](#) for a list of all these processes.

J. Approval Information

The signatures relay an understanding of the purpose and content of the document by those endorsing it. By signing this document, you agree to this as the formal Charter statement to begin work on the project described within, and commitment of the necessary resources.

Approval Signatures

Role	Name	Signature	Date
Business Owner	Phillip Bergquist Business Owner-Policy & Legislative		
Business Owner	Amy Hundley Business Owner-Field Operations		
Business Owner	Jamy Hengesbach Business Owner-Medicaid		
BIC Project Manager	Todd Miller		
BIC Business Delivery Liaison	Brant Cole		
DTMB Technical Delivery Owner	Judy Odett		
Vendor Project Manager	Gajendra Prasads (GP) Sankaranarayana		



Integrated Service Delivery (ISD)

Contact Center (CC) Pilot

Project Charter

**State of Michigan
ISD-Contact Center (CC) Pilot
Project Charter**

A. General Information

Project ID/Acronym:	Contact Center (CC)	Date:	12/8/2016
Controlling Agency:	MDHHS	Modification Date:	1/20/2017
Prepared by:	Todd Miller	Authorized by:	Amy Hundley Jamy Hengesbach Phillip Bergquist

Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved with this system/project or who will become involved during its lifecycle.

Program Charter

This project operates under the authority and governance of the Updated ISD FY17 Program Charter and follows the processes set forth in the BIC ISD PMO.

- [Updated ISD FY17 Program Charter](#)

Change Control

Revision Date	Author	Section(s)	Summary
12/8/2016	Todd Miller	All	Initial Draft
12/27/2016	Todd Miller	All	
12/27/2016	Kevin Adler	Roles and Responsibilities and Governance	Standardized the formatting of these sections and added references to the PMO documentation.
12/29/2016	Todd Miller	All	Updates to incorporate feedback from stakeholders and executive sponsors.

Revision Date	Author	Section(s)	Summary
1/04/2017	Todd Miller	Project Scope	Add new scope statements and enhanced statements to clarify, integration with CC and Bridges.

B. Project Purpose

The purpose of this project is to develop an Integrated Service Delivery (ISD) Contact Center (CC) that functions as the first point of contact between a customer, their benefits, and their case management resources. The CC will provide self-service functionality which will free up caseworkers from responding to inquiries that could be handled by an automated system, such as checking eligibility status.

The CC system will be integrated with the Universal Caseload (UCL) system for access to case functions (e.g., registration, intake, redetermination, change, etc.). These case functions, combined with predictive analytics, will be used to help direct calls to the appropriate group of experts for one call resolution.

The CC project will gather detailed requirements, design, construct and test the CC system; such that it is implemented and ready for pilot in January 2018 in Shiawassee and Gratiot counties. The pilot will be released as a functional product with features described in the scope section of this charter to the county regions above with the intent of learning how a large-scale rollout might work in practice.

C. Project Objectives

The CC Pilot project objectives are described within the Updated ISD FY17 Program Charter, section E. Project objectives specific to CC have been listed here for completeness:

1. Complete a Contact Center (CC) Pilot.
2. Complete new infrastructure development pre-implementation to support the CC system.
3. Create standardized business processes throughout the organization to ensure successful integration of CC systems into the organization and into other supporting components.
4. Create and execute an Operational Readiness program.

D. Project Scope

This project inherits the high-level program scope of the Updated ISD FY17 Program Charter, Section F. Project scope specific to CC has been listed here for completeness:

In-Scope

1. Implement a single toll-free number to access assistance state wide.
2. Implement Interactive Voice Response (IVR) functionality that will:

- a. Guide callers to self-service functionality or the most appropriate customer service destination (e.g., caseworker).
 - b. Include language support in both English and Spanish.
 - c. Utilize Bridges eligibility data (e.g., information about the customer or customer's case) to personalize the menu of options.
3. Provide call reporting and service optimization metrics (e.g., call abandonment rate)
4. Eliminate case worker voicemail functionality.
5. Implement skills-based call routing via integration with Universal Caseload (UCL) that helps direct calls to the appropriate group of experts.
6. Integrate the CC system with UCL to allow caseworker screens to be prepopulated with callers' information.
7. Implement a customer automated call back feature so when wait times exceed a predefined length of time, customers can choose to be called back when it is their turn. This will reduce customer wait times and reserve the customer's place in line.
8. Implement the following phone coaching/management capabilities for caseworker training purposes:
 - a. Ability to record calls.
 - b. Ability to monitor and participate in live calls.
9. Integrate the CC with the existing State of Michigan call quality recording platform.
10. Implement call queuing functionality to present custom voice messages while customers are on hold (e.g., the caller's expected wait times).
11. Implement agent and manager real-time and historical reporting, (e.g., number of calls in queue, average abandonment time, longest wait time, etc.), for use in making informed decisions for IVR optimizations.
12. Implement dynamic messaging functionality to provide the customers with holiday hours, closure notices and emergency messages.
13. Create an Operational Readiness program which standardizes caseworkers' business processes around the use of CC and supporting components, to enhance the adoption of the CC system and associated roles based casework model.
14. Leverage the Bridges Resource Center (BRC) to support MDHHS staff calls on the operational use of the Contact Center.

Supporting Services

1. Eligibility
 - a. Exposing eligibility information about a customer or customer's case to the Contact Center IVR (i.e., leveraging the Master Person Index, MPI).
 - b. Enhance the Enterprise Service Bus (ESB)/HUB to support communication between the CC and interfacing systems.

Out-of-Scope

1. Inclusion of new or existing MDHHS contact centers into the ISD CC
2. Support for customer self-service capabilities, such as the ability to update case information through the IVR tool. This functionality would continue to be done by a caseworker.
3. 3rd party translation service integration (i.e., Language Link)
4. Interactive chat functionality between customers and staff
5. The ability to solicit customer satisfaction feedback via phone survey.
6. Workforce Management which provides the ability to project seasonal call volumes and to manage workforce respectively.
7. Text and Short Messaging Service (SMS) messaging both inbound and outbound.

Assumptions

1. The project will adhere to the State of Michigan SUITE waterfall project processes
2. Work required to implement the CC, but done by groups outside the CC team, will be completed on a mutually agreeable schedule.
3. All additional development and implementation beyond the CC pilot will require additional funding.
4. Delivery of the CC Pilot will coincide with the delivery of the Universal Caseload (UCL) Pilot.
5. Source systems will make data secure and available for consumption by the CC system.

Constraints

1. Project delivery milestones must align with the ISD UCL Pilot project delivery milestones (Training, UAT, and Release).
2. MiECC, Telecom and Enterprise Security have commitments to the daily operational needs of many agencies. Some members of these operational teams have expertise that will be necessary for the success of the project. Operational emergencies may impact their availability.
3. There will be a yet to be determined minimum network and hardware standard that qualifies a county office to leverage the Contact Center technology.
4. The Eligibility PMO has a quarterly release cycles which will dictate when Bridges specific technology can be released.
5. Vendor Statement of Work and Purchase Order approvals will be required to start Requirements Definition phase of the project.

Risks:

1. It is anticipated, yet unknown, how Federal and State program policy mandates and/or waivers may be affected. It is unknown what new mandates or waiver requests are needed.

E. Project Critical Success Factors

The list below identifies the project's critical success factors:

1. All in scope items delivered on-time and within budget.

F. Initial High Level Project Planning

Estimated Project Budget

Please refer to the ISD Budget Worksheet at the link below for all ISD estimates:

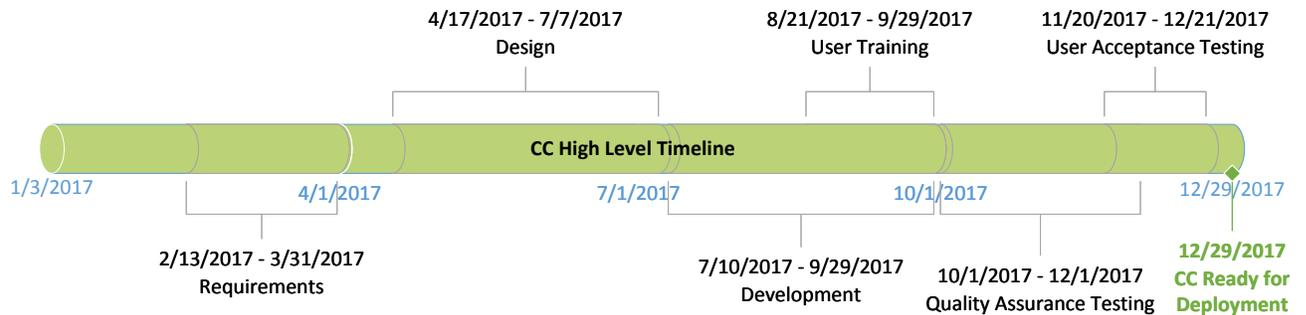
[ISD Budget Worksheet](#)

Estimated Scheduling Dates

Anticipated Start Date: 01/03/2017

Target Completion Date: 12/29/2017

Milestone Timeline:



G. Project Authority

Authorization:

- Jamie Hengesbach** – Business Owner
- Amy Hundley** – Business Owner
- Phillip Bergquist** – Business Owner
- Brant Cole** – Business Delivery Liaison
- Judy Odett** – Technical Delivery Owner
- Pawl Walczuk** – MIECC Project Manager
- Todd Miller** – BIC ISD CC Project Manager

H. Roles and Responsibilities

Program Roles and Responsibilities

Refer to the ISD PMO Roles and Responsibilities document at the following link:

[ISD Roles & Responsibilities Document](#)

Project Governance

Refer to the ISD PMO Governance diagram at the following link:
[ISD Program Governance Document](#)

I. Project Management Processes

This project will follow the standard BIC Project Management guidelines and procedures for management checkpoints, including a weekly review of project status, issues, and risks. Please refer to [BIC ISD Program Management Plan](#) for a list of all these processes.

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BIC Project Manager	Todd Miller		
BIC Business Delivery Liaison	Brant Cole		
DTMB Technical Delivery Owner	Judy Odett		
MiECC Project Manager	Pawel Walczuk		