

Request for Proposals Case Management Software

Ministry of Employment and Income Assistance Request for Proposals Number: SATP-239

Issue date: November 6, 2007

Closing Time: Proposal must be received **before 2:00 PM Pacific Time on: December 20, 2007**

GOVERNMENT CONTACT PERSON: All enquiries related to this Request for Proposals (RFP), including any requests for information and clarification, are to be directed, in writing, to the following person who will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the Province's option.

Brad Boquist

Director, Procurement

Strategic Acquisitions and Technology Procurement Branch

c/o 2nd Floor 563 Superior Street

Victoria, B.C. V8V 1T7

Attention: Brad Boquist

Email: pcadmin@gov.bc.ca

DELIVERY OF PROPOSALS:

Proposals must not be sent by mail, facsimile or e-mail. Proposals are to be submitted to the closing location as follows:

Ten (10) complete hard copies and one (1) copy on diskette or CD must be delivered by hand or courier to:

Strategic Acquisitions and Technology Procurement Branch

c/o 2nd Floor 563 Superior Street

Victoria, B.C. V8V 1T7

Attention: Brad Boquist

Proposal envelopes should be clearly marked with the name and address of the Proponent, the Request for Proposals number, and the project title.



A Proponents' meeting will **NOT** be held.

PROPONENT SECTION:

A person authorized to sign on behalf of the Proponent **must** complete and sign the Proponent Section (below), leaving the rest of this page otherwise unaltered, and include the originally-signed and completed page with the first copy of the proposal.

The enclosed proposal is submitted in response to the above-referenced Request for Proposals, including any addenda.

Through submission of this proposal we agree to all of the terms and conditions of the Request for Proposals and agree that any inconsistent provisions in our proposal will be as if not written and do not exist. We have carefully read and examined the Request for Proposals, including the Administrative Section, and have conducted such other investigations as were prudent and reasonable in preparing the proposal. We agree to be bound by statements and representations made in our proposal.

Signature of Authorized Representative:

Legal Name of Proponent (and Doing Business As Name, if applicable):

Printed Name of Authorized Representative:

Address of Proponent:

Title:

Date:

Authorized Representative phone, fax or email address (if available):

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A. Definitions and Administrative Requirements

1. Definitions

Throughout this Request for Proposals, the following definitions apply:

- a) “API” means application program interface;
- b) “Case Management Software” means a COTS product that will enable Integrated Case Management and Contract and Supplier Management;
- c) “Case Management System” means the Case Management Software as fully implemented to provide Integrated Case Management and Contract and Supplier Management functionality as part of the ICM Solution developed pursuant to the ICM Project;
- d) “Consulting Services” means support for Case Management Software installation/set-up, training, and product expertise to support other software integration/implementation activities or such other services as may be requested by the Province in accordance with the terms of the Contract;
- e) “Contract” means the written agreement resulting from this Request for Proposals executed by the Province and the Contractor;
- f) “Contract and Supplier Management” means the full cycle of contracting from needs identification, through procurement, contract initiation, amending and monitoring and includes tracking and monitoring of outcomes and services received by individual clients through contracts between the Province and organizations, agencies, or individuals working on behalf of the Province;
- g) “Contracted Services” means the Maintenance Services, Consulting Services, and warranty services as described in this document and set out in the Contract;
- h) “Contractor” means the successful Proponent to this Request for Proposals who enters into a written Contract with the Province;
- i) “Corporate Accounting Services” or “CAS” means the Province’s organization within the Common Business Services Division of the Ministry of Labour and Citizens’ Services, which manages the production, maintenance and development of the corporate financial accounting and financial management applications as more particularly described in Section 6.1.5;
- j) “Corporate Contract Management Project” means the Corporate Contract Management Solution (more particularly defined in Section 6.1.5), which is a multi-year initiative by CAS to implement the Oracle Contract Modules. It requires all ministries to use the solution for financial management functionality in order to capture core information and manage corporate contract spend and risk;
- k) “COTS” means Commercial Off The Shelf software;
- l) “FTP” means file transfer protocol;
- m) “Integrated Case Management” means a practice of planning for clients that encompasses a holistic approach to service delivery and includes the perspective and information from clients themselves, various Service Delivery Providers and professionals simultaneously as more particularly described in Section 3.2.2;
- n) “Integrated Case Management Project” or “ICM Project” means the phased project as described in Section 2.1.2
- o) “Integrated Case Management Solution” or “ICM Solution” means the fully developed solution by the Systems Integrator for the Social Sector Integrated Information Management

Project and includes the fully implemented Case Management System;

- p) “Maintenance Services” means as described in Section 4.1 of Appendix A;
- q) “MCFD” means the Ministry of Children and Family Development;
- r) “MEIA” means the Ministry of Employment and Income Assistance;
- s) “must”, or “mandatory” means a requirement that must be met in order for a proposal to receive consideration;
- t) “Oracle Contract Modules” means the Oracle Procurement Contracts, Contracts, Quality, and iSupplier modules of the Oracle Financials Enterprise Resource Planning suite;
- u) “person” means an individual, firm, organization or corporation;
- v) “Person Registry” means as described in Section 5.3.1;
- w) “Phase 1” means the first phase of the Integrated Case Management Project as more particularly described in Section 2.1.2;
- x) “Phase 2” means phase 2 of the Integrated Case Management Project as more particularly described in Section 2.1.2;
- y) “Phase 3” means phase 3 of the Integrated Case Management Project as more particularly described in Section 2.1.2;
- z) “Phase 4” means phase 4 of the Integrated Case Management Project as more particularly described in Section 2.1.2;
- aa) “Phase 5” means phase 5 of the Integrated Case Management Project as more particularly described in Section 2.1.2;
- bb) “Proponent” means a person that submits, or intends to submit, a proposal in response to this Request for Proposals;
- cc) “Province” means Her Majesty the Queen in Right of the Province of British Columbia and includes MCFD, MEIA and Ministry of Labour and Citizens’ Services;
- dd) “Request for Proposals” or “RFP” means the process described in this document;
- ee) “Security Registry” means the security registry of the Ministry of Children and Family Development described in Section 5.3.1;
- ff) “Service Delivery Provider” means a person delivering mandated services on behalf of the Province as more particularly defined in Section 3.3;
- gg) “Service-Oriented Architecture” or “SOA” means a software architecture that defines the use of loosely coupled software services to support the requirements of business processes and software users;
- hh) “Service Registry” means as described in Section 5.3.1;
- ii) “should” or “desirable” means a requirement having a significant degree of importance to the objectives of the Request for Proposals;
- jj) “Systems Integrator” means the entity which the Province contracts with, and may also include internal staff and independent contractors, to design, build and implement the ICM Solution and provide services including, but not limited to, project management, detailed requirements, design, configuration, build of required interfaces to integrate the Case Management Software with other systems, testing, training, change management, implementation and maintenance and support for the ICM Solution; and
- kk) “Workplace Technology Services” or “WTS” means the division within the Ministry of Labour and Citizens’ Services that provides information technology infrastructure services to Government and the broader public sector as more particularly described in Section 5.1.2.

2. Terms and Conditions

The following terms and conditions will apply to this Request for Proposals. Submission of a proposal in response to this Request for Proposals indicates

acceptance of all the terms that follow and that are included in any addenda issued by the Province. Provisions in proposals that contradict any of the terms of this Request for Proposals will be as if not written and do not exist.

3. Additional Information Regarding the Request for Proposals

Proponents are advised to fill out and immediately return the Receipt Confirmation Form attached as Appendix W.

All subsequent information regarding this Request for Proposals, including changes made to this document will be posted on the BC Bid website at www.bcbid.ca. It is the sole responsibility of the Proponent to check for amendments on the BC Bid website.

4. Late Proposals

Proposals will be marked with their receipt time at the closing location. Only complete proposals received and marked before closing time will be considered to have been received on time. Hard-copies of late proposals will not be accepted and will be returned to the Proponent. Electronic proposals that are received late will be marked late and will not be considered or evaluated. In the event of a dispute, the proposal receipt time as recorded at the closing location shall prevail whether accurate or not.

5. Eligibility

- a) Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the Province's opinion, give rise to a conflict of interest in connection with the ICM Project. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Government Contact Person listed on page 1 prior to submitting a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.
- c) Contracted resources have been used to work directly and indirectly on the ICM Project. PriceWaterhouseCoopers LLP and Rockland System Solutions Inc. have supported MEIA and MCFD and are precluded from being a Proponent or a sub-contractor to a Proponent on the opportunity described in this RFP.
- d) All Proponents should be aware that the Contractor will **not** be eligible to participate as a proponent or sub-contractor in any subsequent procurement to secure a Systems Integrator.

6. Evaluation

Evaluation of proposals will be by a committee formed by the Province and may include employees and contractors of the Province. Although all personnel will be bound by the same standards of confidentiality, it is the Province's intention to only allow the contracted resources described in paragraph 5 to have access to the business and technical requirements portion of proposals in order to provide assistance to the Province in a limited way as subject matter experts.

The Province's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

7. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the Province may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposals process and not enter into a Contract with any of the Proponents.

8. Debriefing

At the conclusion of the Request for Proposals process, all Proponents will be notified. Unsuccessful Proponents may request a debriefing meeting with the Province.

9. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

10. Changes to Proposals

By submission of a clear and detailed written notice, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the Province for purposes of clarification.

11. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the Province, if any. If the Province elects to reject all proposals, the Province will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

12. Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

13. Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

14. Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposals specifically states otherwise.

15. Currency and Taxes

Prices quoted are to be:

- a) in Canadian dollars;
- b) inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and
- c) exclusive of Goods and Services Tax and Provincial Sales Tax.

16. Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposals is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

17. Sub-Contracting

- a) Using a sub-contractor (who should be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.
- b) Sub-contracting to any person whose current or past corporate or other interests may, in the Province's opinion, give rise to a conflict of interest in connection with the ICM Project will not be permitted. This includes, but is not limited to, the contracted resources set out in subparagraph 5c) and any other person involved in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether a proposed sub-contractor gives rise to a conflict of interest, the Proponent should consult with the Government Contact person listed on page 1 prior to submitting a proposal.

It is not the intent of the Province that IBM Global Services, Sierra Systems Group Inc., or Cardinal Systems Group Ltd. be conflicted from bidding on the opportunity described in this RFP as a result of their involvement in related services for the Province (see Section 2.10).

- c) Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional sub-contractors will be added, nor other changes made, to this list in the Contract without the written consent of the Province.

18. Acceptance of Proposals

- a) This Request for Proposals should not be construed as an agreement to purchase goods or services. The Province is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The Province will be under no obligation to receive further information, whether written or oral, from any Proponent.
- b) Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

19. Definition of Contract

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

20. Contract

By submission of a Proposal, the Proponent agrees that should its Proposal be successful the Proponent will enter into a Contract with the Province that will include all of the following:

- a) The terms as set out in Appendix A Contract Terms and Conditions; and
- b) The terms set out in Appendix T Privacy Protection Schedule.

Multiple contracts are not anticipated as an outcome of this RFP but the Province may in its sole discretion choose to split the Contract into two Contracts. The Province may sign more than one Contract with the successful Proponent for the Case Management Software and Contracted Services.

21. Liability for Errors

While the Province has used considerable efforts to ensure information in this Request for Proposals is accurate, the information contained in this Request for Proposals is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Province, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposals is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposals.

22. Modification of Terms

The Province reserves the right to modify the terms of this Request for Proposals at any time in its sole discretion. This includes the right to cancel this Request for Proposals at any time prior to entering into a Contract with the successful Proponent.

23. Ownership of Proposals

All proposals submitted to the Province become the property of the Province. They will be received and held in confidence by the Province, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this Request for Proposals.

24. Use of Request for Proposals

Any portion of this document, or any information supplied by the Province in relation to this Request for Proposals may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information supplied by the Province in relation to this Request for Proposals.

25. Reciprocity

The Province may consider and evaluate any proposals from other jurisdictions on the same basis that the government purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.

26. No Lobbying

Proponents must not attempt to communicate directly or indirectly with any employee, contractor or representative of the Province, including the evaluation committee and any elected officials of the Province, or with members of the public or the media, about the ICM Project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by the Province.

27. Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and employees of any sub-contractors. If this RFP requires Proponents to provide the Province with personal information of employees who have been included as resources in response to this RFP, Proponents will ensure that they have obtained written consent from each of those employees before forwarding such personal information to the Province. Such written consents are to specify that the personal information may be forwarded to the Province for the purposes of responding to this RFP and use by the Province for the purposes set out in the RFP. The Province may, at any time, request the original consents or copies of the original consents from Proponents, and upon such request being made, Proponents will immediately supply such originals or copies to the Province.

B. Requirements and Response

1 Summary of the Requirement

This Request for Proposals (RFP) is being issued by the Ministry of Employment and Income Assistance (MEIA) to solicit proposals for Case Management Software, Maintenance Services and related Consulting Services for use by MEIA and the Ministry of Children and Family Development (MCFD) and which may, in the future, be used by the broader public sector within British Columbia, including but not limited to ministries, crown corporations, and Service Delivery Providers.

The Province is interested in vendors with Case Management Software that could serve as a building block to achieve the Province's vision for information sharing and integrated case management across the social sector. Improving outcomes for British Columbia's most vulnerable citizens will require collaborative, citizen-centred service delivery across the social sector.

The Province envisions that the Case Management Software purchased will be Commercial Off The Shelf software (COTS) having the following characteristics as more particularly described in this RFP:

- Significant functionality that is proven to operate in the social/human services environment;
- Extensive product support available during and post implementation;
- Concise documentation to implement, operate and maintain the Case Management Software;
- User configurable rules based, table driven capabilities;
- Easily configured interoperability capability allowing interfaces to legacy systems;
- Established interfaces to facilitate integration with other third party software including, but not limited to, reporting tools or business intelligence software;
- An extensive client base in similar business environments to the Province; and
- Scalability for implementation in small to very large environments.

It is the intent of the Province to:

- Fix the price for and procure a license for the Case Management Software to support up to 5,500 core MEIA and MCFD users and ongoing Maintenance Services to support those licenses, including all applicable terms;
- Fix the price for and procure those licenses and any associated Maintenance Services, including all applicable terms for any separate licenses required for the implementation, configuration, integration, deployment development of the Case Management Software by the Province or the Systems Integrator, either as part of the Integrated Case Management (ICM) Project or on an ongoing basis;
- Fix the price for extension of the license to support other provincial government and/or other broader public sector users above the 5,500 core MEIA and MCFD users and associated Maintenance Services, including all applicable terms;
- Fix the hourly rates and terms for Consulting Services; and
- Identify costs and terms for future extension of use of the Case Management Software or portions of it to some or all of the Service Delivery Providers and other ministries and crown corporations.

The Province, in its sole discretion, reserves the right to increase or decrease the purchase of Case Management Software licenses and associated Maintenance Services for those licenses.

2 Project Overview

2.1 Social Sector Integrated Information Management Project and Vision

In 2005, the Province set out “Five Great Goals for a Golden Decade” to help British Columbia realize its full potential as the best place on earth to raise a family, to live and play, and to work, invest, and get ahead. Great Goal 3 commits to building the best system of support in Canada for persons with disabilities, those with special needs, children at risk and seniors. To achieve this goal, service delivery will need to be collaborative and citizen-centred – not from one organization alone, but across the social sector.

The Office of the Chief Information Officer in the Ministry of Labour and Citizens’ Services is leading the Social Sector Integrated Information Management Project to develop a secure, privacy-protected information sharing framework and a context for Integrated Case Management and Contract and Supplier Management. This will provide the holistic view of each citizen required to truly integrate delivery of social services in support of Great Goal 3, linking case information collected by other organizations delivering services to the public, such as the ministries of Health, Education, and the Attorney General, other provinces, the federal government, and Service Delivery Providers.

There are clear benefits to an improved ability to share information across the social sector:

- Citizens can have simpler, speedier, and more seamless interactions with the Province;
- Improved information sharing capacity and provision of information for decision-making at the individual and aggregate level;
- Better program evaluation, planning and resource allocation; and
- Increased capability to respond rapidly to emergency situations.

Social Sector Integrated Information Management Project Vision

The right information, to the right people, at the right time, in a secure manner that protects privacy to improve outcomes for citizens through the cohesive delivery of social services. This includes timely access to personal information for front-line staff to facilitate provision of services to citizens, as well as anonymous aggregate information for research, evaluation and planning at the program, ministry and sector level.

A key component of the Social Sector Integrated Information Management Project is the Integrated Case Management Project that will serve as a building block to achieve the Province’s vision for information sharing and integrated case management across the social sector.

2.1.1 INTEGRATED CASE MANAGEMENT PROJECT

The purpose of the ICM Project is to collaboratively deliver an ICM Solution to meet the business requirements of both the MCFD and MEIA and support the overall Social Sector Integrated Information Management Project vision of information sharing across the social sector. The ICM Solution will enable government staff to provide citizen-centered services and truly integrated care to their clients while at the same time enabling the effective management and secure information sharing across the social sector; thereby, improving outcomes for vulnerable children, families, and individuals.

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2.1.2 ICM PROJECT STRUCTURE

This procurement is the first of five planned phases of the ICM Project. These phases are described in general terms for the information of Proponents. It should be understood that the phases may be changed at the discretion of the Province.

Integrated Case Management Project	
Phase 1 Procure Case Management Software	
Collaborative procurement of Case Management Software, Maintenance Services and related Consulting Services by MEIA, MCFD, and the Ministry of Labour and Citizens' Services. During this phase, the Province intends to procure the initial Case Management Software licenses, establish the pricing and terms for Maintenance Services, as well as establish pricing and terms for Consulting Services as more particularly defined in Section 2.2. It is currently anticipated that this phase will conclude with Contract signing with the successful Proponent.	
Phase 2 Planning and Systems Integration	
The Province will complete planning and analysis activities in preparation for the deployment of the Case Management Software. It is anticipated that the Province will procure Systems Integrator services during this phase and involve the Systems Integrator in the planning process. - The Contractor for the Case Management Software selected in Phase 1 will be expected to provide support to the Province to facilitate the Province's analysis, planning, and selection of a Systems Integrator by providing Consulting Services to the Province. As part of the Consulting Services, the Contractor selected in Phase 1 will be required to cooperate with and assist the Systems Integrator by providing functional and technical information about the Case Management Software if directed to do so by the Province. - During this phase, the Province expects to install and use the Case Management Software for learning, modelling and design purposes. - It is expected that Phase 2 will be no longer than 12 months. However, the duration of Phase 2 has not been fully assessed, and may change at the sole discretion of the Province.	
Phase 3 Blueprint and Configure Phase	
It is anticipated that the Province, with its Systems Integrator, will develop a solution blueprint, including detailed design for configuration of the Case Management System. - During this phase, the Province will use the Case Management Software to support the Phase 3 activities. - During this phase, the Contractor selected in Phase 1 will be required to provide expert technical and functional support to the Province and/or its Systems Integrator. The Contractor selected in Phase 1 will provide these Consulting Services at the rates defined in the Contract. During this and other phases, the Contractor selected in Phase 1 will provide expert technical and/or functional support either on-site or remotely. - It is expected that Phase 3 will be no longer than 12 months. However, the duration of Phase 3 has not been fully assessed, and may change at the sole discretion of the Province.	

Phase 4 Implementation

The Province, with its Systems Integrator, will begin to deploy the ICM Solution to the target users. During this phase, data conversion, interfacing, report configuration and other deployment-oriented activities will take place.

- During this phase, the Province and the Systems Integrator may require functional and technical support from the Contractor selected in Phase 1 in the form of Consulting Services. The Consulting Services to provide this support will be provided by the Contractor selected in Phase 1 in accordance with the pricing defined in the Contract.
- Phase 4 is expected to be staged as follows:
 - o **Stage 4a:** Replacement of identified existing MEIA and MCFD systems and linking of case information collected by other organizations delivering services to the public, such as the ministries of Health, Education, and the Attorney General, other provinces, the federal government, and Service Delivery Providers
 - o **Stage 4b:** Rollout of the new Case Management System to identified Service Delivery Providers as a replacement for existing systems.
 - o **Stage 4c:** Rollout of new Case Management System to identified Service Delivery Providers without existing systems.

Phase 5 Future Implementation

Following a successful Phase 4, the Province may desire to implement the ICM Solution more widely. Accordingly, the Province would negotiate with the Contractor and the Systems Integrator to add functions and expand the users and potential licensees outside of MEIA, MCFD and their Service Delivery Providers.

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2.2 Scope of this Procurement

2.2.1 IN SCOPE

The following is included as the intended scope for Phase 1:

- Fix the price for and procure a license for the Case Management Software to support up to 5,500 core MEIA and MCFD users and ongoing Maintenance Services to support those licenses, including all applicable terms;
- Fix the price for and procure those licenses and any associated Maintenance Services, including all applicable terms for any separate licenses required for the implementation, configuration, integration, deployment development of the Case Management Software by the Province or the Systems Integrator , either as part of the ICM Project or on an ongoing basis;
- Fix the price for extension of the license to support other provincial government and/or other broader public sector users above the 5,500 core MEIA and MCFD users and associated Maintenance Services, including all applicable terms;
- Fix the hourly rates and terms for Consulting Services; and
- Identify costs and terms for future extension of use of the Case Management Software or portions of it to some or all of the Service Delivery Providers and other ministries and crown corporations.

The Province, in its sole discretion, reserves the right to increase or decrease the purchase of Case Management Software licenses and associated Maintenance Services for those licenses.

2.2.2 POTENTIAL SCOPE

The following is the potential future scope:

- Use of the Case Management Software by the broader public sector within the Province of British Columbia, including but not limited to other ministries, crown corporations, and Service Delivery Providers.

2.2.3 OUT OF SCOPE

The following is not in scope for this procurement:

- The Corporate Contract Management Project.

2.3 Term of the Contract Services

The term of the Contract will be six (6) years with the option to extend the Contract for two (2) additional two (2) year terms at the sole option of the Province.

2.4 Ownership of Licenses

The Province will own the Case Management Software licenses in perpetuity. Licenses purchased will be owned by the Province.

In the future, the management of the Case Management Software licenses may move between areas of the Province. As of this date, the future governance for the ICM Project has not been determined. The Province reserves the right to transfer the purchased licenses, at no cost, between ministries, to the broader public sector within British Columbia, (including but not limited to crown corporations and Service Delivery Providers), or to the Systems Integrator. If the ICM Project is terminated or modified, the licenses purchased could be used by these ministries or the broader public sector for another project at the sole discretion of the Province.

2.5 Use of Software

Both MEIA and MCFD anticipate that the initial purchase will be for perpetual licenses to support approximately 5,500 users with one or more instances of the proposed Case Management Software. While MEIA and MCFD anticipate using the proposed Case Management Software for their Integrated Case Management and Contract and Supplier Management solutions, this procurement does not preclude either MEIA or MCFD, or any other ministry, from using other case management software.

As part of the ICM Solution, it is the intention that both MEIA and MCFD clients will be able to do business with the ministries electronically. As such, any clients, or member of the public, that are authorized by the Province to have access to the Case Management System, will do so free of charge to the user and the Province.

2.6 Case Management Software Procurement Considerations

As the ICM Project is in its early stages, the exact procedure and timing of the rollout to the MEIA and MCFD core users has not been determined. In addition, a final decision on whether or not to rollout the ICM Solution to Service Delivery Providers (see Section 6.3.7 for details) and the procedure and timing of that rollout has not been made. The Province prefers a license and license fee structure that will accommodate an initial staged rollout of to up to 5,500 MEIA and MCFD core users and will accommodate a further staged rollout to some or all of the 13,000 Service Delivery Providers. Specifically, Proponents should contemplate the following considerations when formulating their approach to license and license maintenance pricing:

1. The Province has approximately 5,500 potential Case Management System users within MEIA and MCFD. The Province would like to procure a license to support up to 5,500 of those users. The Province is open to considering innovative licensing and pricing approaches including, enterprise, concurrent user, named user or other approaches. The Province may choose to initially deploy to fewer than 5,500 users and add users incrementally over time, and would be interested in license and pricing approaches that accommodate this potential need.
2. In addition, there are approximately 13,000 Service Delivery Providers who are potential users of the ICM Solution, and who may therefore require some form of access to the ICM Solution (see Section 6.3.7). The Province may choose to provide “minimal”, “light”, and “full” ICM

Solution access to these Service Delivery Providers. The timing and the number of Service Delivery Providers affected is not currently known. The Province is open to considering innovative licensing and pricing approaches including enterprise, concurrent user, named user or other approaches to provide ICM Solution access to these Service Delivery Providers.

3. The Province may want to roll-out the ICM Solution to other ministries and organizations within the broader public service. Proponents should consider the licensing and fee structures that would accommodate this potential need of the Province.

4. The Province does not currently know the specific timing for the deployment of the Case Management Software into a live production environment and as such, does not wish to pay Maintenance Services on licenses until the Case Management Software is in a live production environment.

2.7 Maintenance and Warranty

Warranty - The Contractor will warrant that the Case Management Software will perform in accordance with an agreed set of specifications during an agreed warranty period. The Contractor will agree to remedy any failure of the Case Management Software to perform in compliance with the warranty by either repairing or replacing the non-conforming software.

Maintenance Services - The Contractor will provide Maintenance Services for the Case Management Software.

Timing Issues - As noted in Section 2.6 above, the Province has not yet determined the schedule for rollout of the Case Management System to users within MEIA, MCFD and Service Delivery Providers. It is possible that the Case Management Software may not be installed, or used in a live, production environment for some time (perhaps as long as two years) after the initial purchase. The Province believes that the common software model of a warranty period commencing upon delivery, installation or first use of the software followed by the purchase of maintenance and support services will not work in these circumstances and is seeking creative solutions that will address the following interests:

1. The warranty period should not start to run until the Case Management Software is in live, productive use, and will continue for a period of at least 90 days. However, if problems with the Case Management Software are identified prior to commencement of live, productive use, those problems would be covered by the warranty, the Province would need, and expect, to have those problems addressed.

2. Maintenance Services would normally not be purchased until after expiry of the warranty period, which would normally be at a time when the Case Management Software is in live, productive use. However, during the portion of the ICM Project leading up to live, productive use of the Case Management Software, the Province may require assistance with the Case Management Software of the type that would normally be part of Maintenance Services. Also, during the warranty period, the Province would want access to help desk and other support services that may be included in the Maintenance Services but not in the warranty obligations. However, if during the warranty period the Province is paying for the Maintenance Services, it is not receiving the full benefit of the warranty.

3. To reflect the staged rollout of the Case Management Software to the various user groups, the Province expects that fees for Maintenance Services will reflect the then-current extent of use of the Case Management Software at any given time and the associated license fees, and would not be based on the full potential use and associated license fees of the Case Management Software.
4. The Province wishes to ensure that it will receive updates, upgrades and new releases of the Case Management Software during the ICM Project so that on the go-live date, the Case Management Software reflects the then-current version of that software, rather than the version originally purchased by the Province, which could by the go-live date be more than two years old.

In summary, the Province is interested in how Proponents would propose, through some combination of warranty, maintenance, support and other services, to provide the Province with the assistance it requires to ensure that the Case Management Software will function properly throughout the ICM Project such that on the go-live date a then-current version of the Case Management Software will be in place with appropriate support to ensure proper functioning on an ongoing basis, with all applicable fees identified.

2.8 Source Code

The Province does not intend to require the Contractor to provide the source code for the Case Management Software. However, the Province may require that the Contractor place in escrow, with a third party acceptable to the Province, the source code for the Case Management Software and such additional materials as may be required to effectively use the source code to maintain and support the Case Management Software.

2.9 Exclusivity of Implementation

The Province will be free to use any Systems Integrator at its sole discretion. The Contractor will, as part of the Consulting Services, provide services (e.g. expert support, documentation, methodology) to any Systems Integrator, at the direction of the Province and the quality of the services provided by the Contractor will not differ depending on which entity the Province chooses as a Systems Integrator. Accordingly, there will be no exclusive limits by the Contractor on implementation. For further clarity, the Province will not be bound by any exclusivity arrangements related to the proposed Case Management Software that Proponents may have in British Columbia with any systems integrators.

2.10 Eligibility for this RFP and Future Systems Integrator Contract

All Proponents should be aware that the Contractor will not be eligible to participate as a proponent or sub-contractor in any subsequent procurement to secure a Systems Integrator in Phases 2 through 5 as more particularly described in Section 2.1.2.

In addition, the following companies have current contracts with the Province.

The Corporate Contract Management Project is related to the ICM Project as more particularly described in Section 6.1.5 Corporate Contract Management Project, and a consortium of IBM Global Business Services, Sierra Systems Group Inc., Cardinal Systems Group Ltd and Rockland System Solutions Inc.

have a contract to provide implementation and maintenance for CAS. Rockland System Solutions Inc. also has a contract with the Province to provide assistance with this phase of the ICM Project and although the Province and Rockland System Solutions Inc. have taken steps to ensure there is no transfer of information between Rockland System Solutions Inc.'s work on the CAS project and the ICM Project, Rockland System Solutions Inc. will not be eligible to submit a proposal for this RFP as a Proponent or a sub-contractor to a Proponent. It is not the Province's intention to preclude IBM Global Business Services, Sierra Systems Group Inc. or Cardinal Systems Group Ltd from submitting a proposal in response to this RFP.

PriceWaterhouseCoopers LLP is under contract to assist MEIA and MCFD on related projects and has had input into this RFP. All Proponents should be aware that PriceWaterhouseCoopers LLP will not be eligible to submit a proposal for this RFP as a Proponent or sub-contractor.

2.11 Extensions and Customizations

As noted above, the Province requires that the Case Management Software be COTS. However, the Province recognizes that in light of the length and scope of the ICM Project, it is possible that the Province may require enhancements or customization of the Case Management Software. The Contract will require the Contractor to provide these enhancements and customizations as part of the Consulting Services. It is anticipated that if the enhancements and customizations performed as part of the Consulting Services will be owned by the Contractor and can be used by the Contractor in general applications for future versions of the Case Management Software, the cost of the enhancements and customizations would be discounted by the Contractor or used to offset the cost of Consulting Services.

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3 Overview of MEIA and MCFD

3.1 Ministry of Employment and Income Assistance

3.1.1 BACKGROUND

MEIA's mandate is to provide services that move people toward sustainable employment and assist individuals and families in need. MEIA services are provided under the BC Employment and Assistance program, and delivered through six core business areas:

1. Employment Programs: available to assist eligible individuals to find sustainable employment. Programs provided also include employment-related programs and life-skills training to support individuals with multiple barriers and disabilities. Employment programs available include:
 - a. British Columbia Employment Program which provides services and supports to meet the needs of eligible individuals who are deemed expected to work.
 - b. Community Assistance Program designed to provide multi-barriered eligible individuals with a range of life skill services and supports to enhance quality of life and to help them participate more fully in their communities.
 - c. Employment Program for Persons with Disabilities which assists persons with disabilities in achieving their economic and social potential to the fullest extent possible.
2. Temporary Assistance: available to eligible individuals who are capable of financial independence through employment, or are currently unable to seek work because of a short-term condition, as described in the *Employment and Assistance Act*. Persons with persistent multiple barriers to employment are included in this group.
3. Disability Assistance: available to eligible individuals or families who are not expected to gain complete financial independence through employment, including clients with disabilities who are seeking work.
4. Supplementary Assistance: available to eligible individuals, providing health and other supports such as emergency food and shelter, bus passes, health services for Persons with Disabilities, some moving and employment-related expenses, and user fees for continuing care and for alcohol and drug treatment facilities.
5. Employment and Assistance Appeal Tribunal: provides eligible individuals with timely decisions through a single-level, regionally-based appeal system that is available for eligible individuals who wish to appeal decisions. The tribunal operates independently of MEIA.
6. Executive and Support Services: provides executive direction and administrative support for the programs of MEIA. It provides for strategic leadership and corporate governance that contribute to the success of all core business decisions.

3.1.2 CURRENT STATE

MEIA, in collaboration with the Office of the Chief Information Officer, other ministries and stakeholders, has initiated the Multi-Channel Service Delivery initiative. The goal of this project is to automate MEIA's relevant business processes resulting in the enhanced provision of client services through the most appropriate channels.

MEIA delivers many of its services face-to-face and anticipates that this method of delivery will continue to be one of its core service delivery channels. However, in addition to the face-to-face services, MEIA has implemented a series of web-based services to the public that make it easier for people to access information while protecting their personal privacy. These services include the Income Assistance Eligibility Estimator and multi-language orientation sessions. MEIA delivers some services through telephone call-centres, automated telephone inquiry systems and Service Delivery Providers (e.g. government agents), thereby making them accessible even in remote areas of the Province.

Overall, the Multi-Channel Service Delivery initiative will expand MEIA's electronic service delivery, which, when coupled with its desired modernized technology environment, will result in the delivery of citizen-centred, timely, integrated, flexible, and customized services where personal information is protected.

For further details on MEIA's volume of services delivered, see Appendix R MEIA Volume Snapshot.

3.1.2.1 Technology Overview

MEIA's business systems have become inflexible, increasingly fragile, and difficult to adapt to legislative changes. These business systems are based on technology dating back to the 1970s and were originally designed to support MEIA's former business focus: assessing eligibility and generating cheque payments for income assistance.

MEIA also has a number of ancillary systems with varying application and technology architectures. Over the years, MEIA has built numerous custom interfaces to try to integrate data and information between its various systems, which has resulted in a complex and costly application environment that does not support its business needs. In addition, because MEIA does not wish to continue investing in its legacy technology environment, mandatory policy and program changes have necessitated the implementation of labour intensive manual workarounds, rather than further enhancements.

For a map of the Province showing the location of MEIA services by community, see Appendix B Service Maps.

3.1.3 LEGISLATIVE AND POLICY FRAMEWORK

The *Employment and Assistance Act* and the *Employment and Assistance for Persons with Disabilities Act* and companion regulations provide the legislative authority for the provision of the BC Employment and Assistance program. The Case Management Software, as part of the ICM Solution, will need to meet the requirements of the legislation relevant to MEIA.

Policy sets out MEIA's intent with respect to these Acts and Regulations and provides guidelines to assist MEIA staff in the provision of services. Policy is provided to staff and the public through an internet based application called the On-line Resource (see Appendix D).

There are many relevant acts governing MEIA, some of the key pieces of legislation are the following: The *Interpretation Act* assists in the interpretation of provincial enactments and the *Financial Administration Act* governs the Province's financial affairs. The *Freedom of Information and Protection of Privacy Act* governs the conduct of the Province in relation to the collection, protection, use, disclosure, and retention of a person's personal information held by the Province. The *Document Disposal Act* governs the disposal of documents, including electronic records.

3.1.4 FUTURE STATE

MEIA will build upon its citizen-centred culture by working with staff to design coordinated services that meet the client's evolving needs. It is MEIA's intention to review new and existing programs with a focus on service enhancements including timeliness, consistency, cost effectiveness, efficient allocation of resources, and enhanced communication. In addition to the "Multi-Channel Service Delivery" initiative, the following initiatives: "Integrated Service Delivery Project", and "Service Code and Standards Project" build upon these service attributes through streamlining business processes, improving tools and job aids, as well as expanding the use of information and communication technologies.

MEIA's future vision includes expanding its service delivery network by providing increased web access for MEIA clients, enhancing the telephone channel through a provincial "virtual" network, and implementing a Case Management System that provides front-line workers with more sophisticated tools to enable a more integrated and seamless delivery of services to clients, regardless of the channels they access MEIA services through. This includes the move toward a province wide shared caseload model. The Case Management System will provide timely and improved information quality for decision-making, as well as measuring and monitoring outcomes.

This future state will be implemented within the context of the Province's strategic direction, cross-sector collaboration, best practices, and technology strategies, initiatives and standards.

Appendix P Future State Scenario provides an example of MCFD and MEIA's vision for service delivery in the future.

3.2 Ministry of Children and Family Development

3.2.1 BACKGROUND

MCFD was established in 1996 by bringing together services for children, youth and their families that were previously housed under separate ministries. The intention was to provide more integrated services across a broad range of service needs to a geographically and culturally diverse Province.

MCFD's mission is to promote and develop the capacity of families and communities to care for and protect vulnerable children and youth, and to maximize the potential of every child in British Columbia by supporting healthy child and family development.

MCFD is organized into six service delivery regions: North, Interior, Fraser, Vancouver Coastal and Vancouver Island and Provincial Services, plus a Provincial Office which provides corporate services. Appendix B Service Maps provides a provincial map of MCFD's service delivery regions. Regionally delivered services include:

- A range of services to support child and family development such as child protection, residential and foster care, guardianship, permanency and adoption planning for children and youth permanently in care, services to strengthen and preserve families, and programs for at-risk or sexually exploited youth;
- Community-based child and youth mental health services;

- Community-based youth justice services such as probation;
- Early childhood development services to support families with young children such as family resource centres, infant development programs, and supported child development;
- Child care such as financial subsidies and information services for families and operating funds for child care providers; and
- Developmental services for children and youth with special needs and their families such as respite, early intervention therapies and family support programs.

In addition, MCFD is responsible for specialized provincial services including managing the operations for youth custody centres, youth forensic psychiatric services, Maples Adolescent Treatment Centre, services for the deaf and hard of hearing, and migrant services. Appendix S MCFD Volume Snapshot provides detail regarding metrics and volume for MCFD services delivered.

Services are delivered through 212 offices with 4253 Full Time Equivalents (FTEs) and 4525 MCFD staff filling these FTE positions.

A continuum of services exists within each broad service delivery area from promotion and prevention to intensive intervention, including for some areas, residential and custodial/institutional options. While many services are accessed on a voluntary basis, some are mandated services with obligatory participation by the children, youth and families involved. Appendix C MCFD Service Descriptions provides additional information on the range of services that MCFD provides directly or contracts for.

The Minister of Children and Family Development is also mandated to provide a full array of community-based residential and support services for adults with developmental disabilities and their families. These services are governed and provided by a service delivery crown agency, Community Living British Columbia.

MCFD delivers services directly and contracts with Service Delivery Providers to deliver its complex array of services as described in Section 3.3 Service Delivery Providers.¹ Service Delivery Providers include, and are not limited to, delegated Aboriginal child welfare agencies, Community Living British Columbia, foster parents, health authorities, community based agencies and school districts.

Additional information is available from the websites listed in Appendix D Relevant Weblinks.

3.2.2 CURRENT STATE

MCFD is currently engaged in a transformation process with the following goals:

1. Identifying and strengthening effective services for children, youth, families and communities in British Columbia within a strength-based, developmental approach;
2. Supporting Aboriginal people to design regional models and implement services for Aboriginal children, youth, families and communities;
3. Building a fully regionalized model of governance and delivery of services; and
4. Transforming MCFD as an organization to better support the preceding goals.

¹ Approximately 70 to 80 percent of MCFD funding (including Community Living British Columbia) supports contracts with community-based Service Delivery Providers.

This transformation is having, and will continue to have, significant impacts on MCFD business. The Integrated Case Management and Contract and Supplier Management solution will need to support an increasingly regionalized structure of service delivery which may differ for Aboriginal and non-Aboriginal communities.

The goal of Integrated Case Management is to improve outcomes for clients through improved access to effective services and coordinated planning. Integrated case management technology enables this practice. It allows a front-line worker, meeting a client for the first time, to access, as appropriate, all information relevant to the case such as services already received and assessments for support required.

3.2.2.1 Technology Overview

Like MEIA, MCFD operates in a technologically outdated mainframe environment with a myriad of add-on applications wrapped around it on a wide variety of hardware and software platforms.

When MCFD was formed, a number of ancillary systems, with varying application and technology architectures, were brought together. These systems generally serve specific program areas. Over the years, MCFD has built numerous custom interfaces to try to integrate data and information between its various systems. That integration effort has resulted in a complex and costly application environment that does not support integrated service delivery or timely decision-making. Furthermore, critical information to support decision making is held by Service Delivery Providers. Because there are very few electronic interfaces between them, information cannot be shared adequately.

The current state is unsustainable. As a recent Forrester Research report explains, “inflexible, stove-piped applications hamstring states and agencies as they attempt to transform human and social service delivery from a program-centric to a customer-centric approach.”²

3.2.3 LEGISLATIVE AND POLICY FRAMEWORK

There are ten (10) statutes that specifically relate to MCFD and its mandate, statutory responsibilities and activities. While administering services, MCFD must also comply with relevant provisions in at least sixteen (16) additional provincial and federal statutes. In addition, MCFD operations are conducted within a financial and administrative framework defined by many provincial legislative statutes. The Case Management Software, as part of the ICM Solution, will need to enable compliance with the requirements of the legislation relevant to MCFD. For additional information, see Appendix E Relevant Legislation.

MCFD is expected to follow the Province’s financial and general management policy as outlined in the Core Policy and Procedures manual. For additional information, see Appendix D Relevant Weblinks.

MCFD develops and implements operational policy, standards and procedures in relation to each of its core businesses, programs and services, pursuant to legislation, best practices and objectives.

² Leganza, Gene. “The Forrester Wave: Human and Social Services Enterprise Frameworks, Q3 2006,” September 15, 2006.

3.2.4 FUTURE STATE

MCFD envisions a service delivery system which is further regionalized, community based, with a decentralized decision-making structure and may include more co-location of Service Delivery Providers and MCFD staff. Provincial Office in Victoria will primarily focus on policy, standards, quality assurance, accountability, monitoring and allocation of resources.

A more comprehensive continuum of services will be available to children, youth and families and those services will be more integrated and less tied to program silos. In addition, there will be greater resources and focus on the less intrusive front end of the continuum of services.³ MCFD is taking a more child and family-centred approach to working with children and families.

MCFD supports Aboriginal people to design regional models and implement services for Aboriginal children, youth, families and communities. Aboriginal communities and agencies will have greater opportunities to design and deliver services. There may be different approaches in different regions. Regional boundaries may also shift.

Front-line staff, including Service Delivery Provider front-line staff, are critical to the well-being of children, youth and families. Valuable staff time will be more focused on working directly with clients instead of on back office administrative functions.

Appendix P Future State Scenario provides an example of MCFD and MEIA's vision for service delivery in the future.

3.2.4.1 Vision – Technology

MCFD envisions an information management and information technology environment that will support the development of services that are citizen-centred, timely, integrated and flexible. It will:

- Support better Integrated Case Management and Contract and Supplier Management;
- Provide timely and quality information for decision-making;
- Measure and monitor outcomes;
- Allow MCFD to communicate and conduct business with Service Delivery Providers electronically;
- Make administrative tasks much more streamlined and relevant for staff;
- Allow more people to participate electronically, as appropriate, in Integrated Case Management;
- Enable world-class research; and
- Protect privacy through comprehensive safeguards.

Ultimately, children, youth and families will have the access required to meaningfully participate in developing plans to meet their needs. At the same time, privacy will be protected through comprehensive security safeguards.

3.3 Service Delivery Providers

Services to clients in both MEIA and MCFD are provided in part through Service Delivery Providers. The sharing of information between ministry staff and Service Delivery Providers is a critical part of achieving a comprehensive view of the client, managing ongoing services, and informing decision-making at all levels

³ Less intrusive services include, for example, prevention, promotion and early intervention services.

of both organization. As a result, replacing technology alone will not be sufficient to meet business and strategic goals and as such, the ministries have analyzed the optimum approach for information sharing with their Service Delivery Providers.

MEIA has a relatively small number of Service Delivery Providers (e.g. those delivering the B.C. Employment Programs) and plans to continue with the existing approach of extracting data from their systems and aggregating information through a corporate data warehouse. It is not anticipated at this time that MEIA's Service Delivery Providers will have direct access to the new Case Management System.

In comparison, MCFD utilizes a significant number of Service Delivery Providers, with more than \$500M in contracted services purchased annually. There are approximately 13,000 contracts overall which includes approximately 9,000 individual Service Delivery Providers and approximately 4,000 foster parents. In addition, there are 24 Aboriginal delegated agencies. The contractors providing services to Community Living BC and the delegated Aboriginal child welfare agencies are not included in these figures, nor is child care subsidy.

3.3.1 IMPLEMENTATION APPROACH FOR SERVICE DELIVERY PROVIDERS

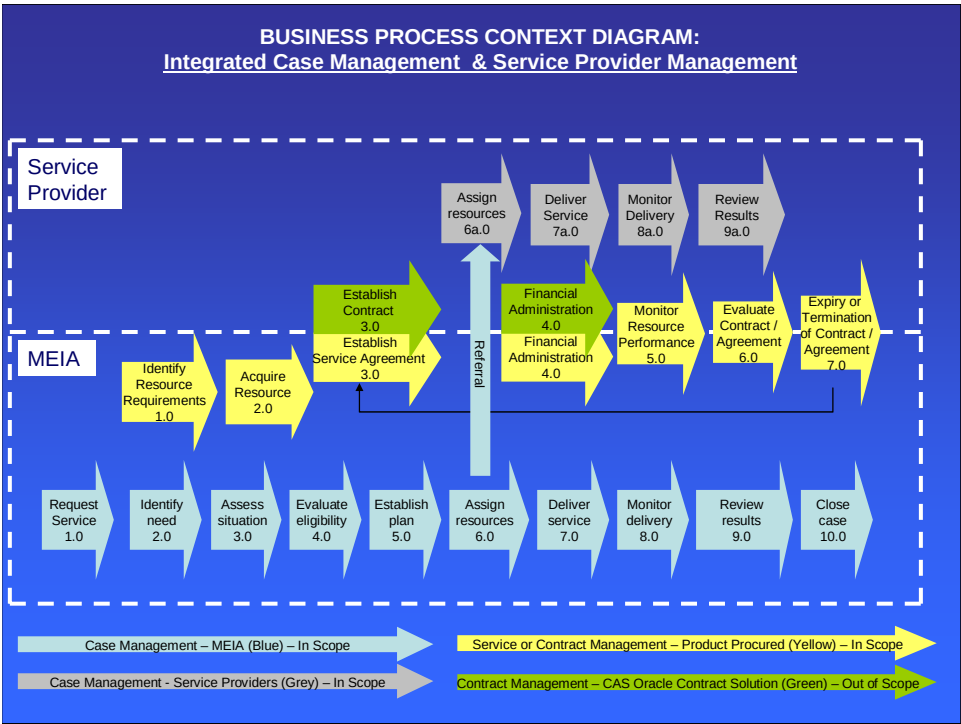
MCFD proposes to rollout functionality to Service Delivery Providers in an incremental way. Some Service Delivery Providers are expected to receive functionality sooner than others based on their readiness and business need. It is not anticipated that all Service Delivery Providers will receive the same level of functionality.

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4 Business Process Models

4.1 MEIA Business Process Model

A continuum of functions is required to provide MEIA programs. Beginning with initial contact and ending with closing of the case, the following ten business functions are required for programs to operate according to MEIA’s policies and mandates:

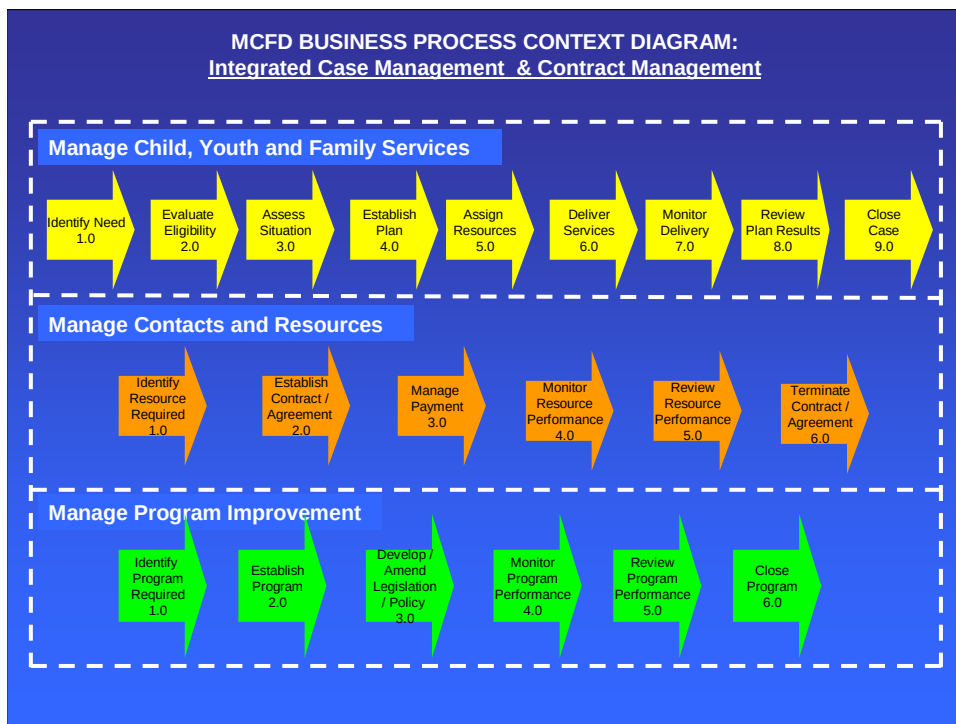


Swim lane diagrams for each of these ten business processes and detailed descriptions of these functions can be found in Appendix F MEIA Process Flow Diagrams and Descriptions.

4.2 MCFD Business Process Model

There is a common business process for the delivery of MCFD services. Some services require the full range of this process and other services involve only a portion of the process. While specific services may use different words to describe the function, the underlying business process is the same.

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A more detailed description of these functions can be found in Appendix G MCFD Business Process Detailed Descriptions.

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5 Current State Technology

5.1 The Province of British Columbia

5.1.1 SECURITY AND ACCESS

The Province has implemented standards for authentication and authorization. The Case Management System should use the Province's authentication services as provided by Workplace Technology Services (WTS). User authentication is based on IDIR (active directory) IDs for internal provincial government users and BCeID (active directory) IDs for external users of the Province's services and applications. The Province also has a significant investment in Oracle-based applications, some of which utilize Oracle Internet Directory. The Oracle Single Sign-on and Oracle Internet Directory instances are integrated with the Siteminder and IDIR active directory to leverage the authentication services.

The Province's Government Information Security Policy is published at:

<http://www.cio.gov.bc.ca/prgs/core.htm> and the Case Management System will have to comply with the requirements of this policy. These security standards are being designed into all provincial government systems and implemented as a top priority. For additional information, see Appendix H Government Technology Standards.

5.1.1.1 WEB Access

The security framework selected by the Province for web-based applications is intended to provide a secure, scalable mechanism for protecting the Province's data. For additional information, see Appendix Q Systems Security and Network Connectivity Standards.

5.1.2 INFRASTRUCTURE

MEIA and MCFD operate in a shared services environment where IT infrastructure standards are centrally governed by WTS. Services provided by WTS include: data centre services, desktop support and service desks, voice and data networks, electronic messaging and directories, applications and service integration, and security/virus protection. Proponents should note that a Joint Solution Request for Proposal was posted to BC Bid (SATP-231) titled "Strategic Transformation and Mainframe Services Project" that may affect the way that some infrastructure services are delivered in the Province.

MEIA and MCFD applications and data reside at WTS. WTS hosting focuses on providing infrastructure and support for applications running on three strategic computing platforms maintained by WTS: Mainframe (OS 390), UNIX/Linux and Windows.

The following hosting services are utilized by MEIA and MCFD through WTS:

- Mainframe Services (IBM MVS) – Provides a shared, secure IBM MVS processing system consisting of current technology hardware components and software products. The IBM MVS service provides a wide range of online and batch services supporting critical line-of-business applications;
- Application Hosting Service for UNIX/Linux or Windows – Provides a dedicated server platform upon which clients can build and run their business applications. WTS works closely with the Client

on a predefined set of services to ensure a stable operating platform for applications on UNIX/Linux or Windows servers. The Application Hosting Service consists of secure floor space, power and environmental controls, one network connection, infrastructure operations and management, procurement, installation and systems management for operating systems and underlying hardware;

- Data Backup Service – Protects data by ensuring it is backed-up (copied), stored and available electronically for use if the originals cannot be accessed due to a failure or disaster. When required, the backup copies are accessible and may be restored. The Data Backup Service may be set up to run on an automated schedule, or provide live (online) backup for Oracle, SQL and Informix databases; and
- All Servers are hosted at WTS, including DB, web and application servers.
 - o **Microsoft .NET** – MS.NET 2.0 is the current server platform. Other platforms will be considered if required to support key business functionality.
 - o **Windows Server** – Windows Server release 2003, as the basic platform for all systems.
 - o **Oracle Database** – Oracle RDBMS is deployed for the majority of the applications.
 - o **Microsoft SQL Server Database** – Microsoft SQL Server 2005 has been deployed for some applications.
 - o **Microsoft Access Database** – deployed to support a limited number of desktop/client server applications, this database technology is being phased out.

For more information, refer to Appendix H Government Technology Standards and Appendix I MEIA and MCFD Technology Standards.

5.1.2.1 Server Standards

The Province has published standards for server hardware and operating systems. Please see Appendix H Government Technology Standards for details.

5.1.2.2 WEB Standards

The Province supports Services-Oriented Architectures (SOA) which include technologies that use Web Services standards such as SOAP, XML, and WSDL. These architectures will be easier to integrate with existing environments and will be more adaptable as new technologies and standards evolve.

5.1.3 NETWORK STANDARDS

WTS manages a shared private data communications network for the Province that connects provincial government offices throughout the Province to a core (backbone) network and the internet. The network is known as the Shared Provincial Access Network for British Columbia, or SPAN/BC, and provides high-speed, reliable and secure network access to over 4,000 client locations in British Columbia.

SPAN/BC is based on the Transmission Control Protocol/Internet Protocol (TCP/IP) communication protocol, the same protocol used on the global Internet. It is designed to utilize advanced telecommunications solutions in partnership with carriers, vendors and local Service Delivery Providers throughout the Province. SPAN/BC provides services throughout British Columbia with points of presence in over ninety (90) Regional Network Centres (RNCs).

5.2 Ministry of Employment and Income Assistance

5.2.1 MEIA SECURITY AND ACCESS MODEL

The Case Management System will be compliant with the Province's policy and standards.

5.2.2 MEIA OPERATING INFRASTRUCTURE

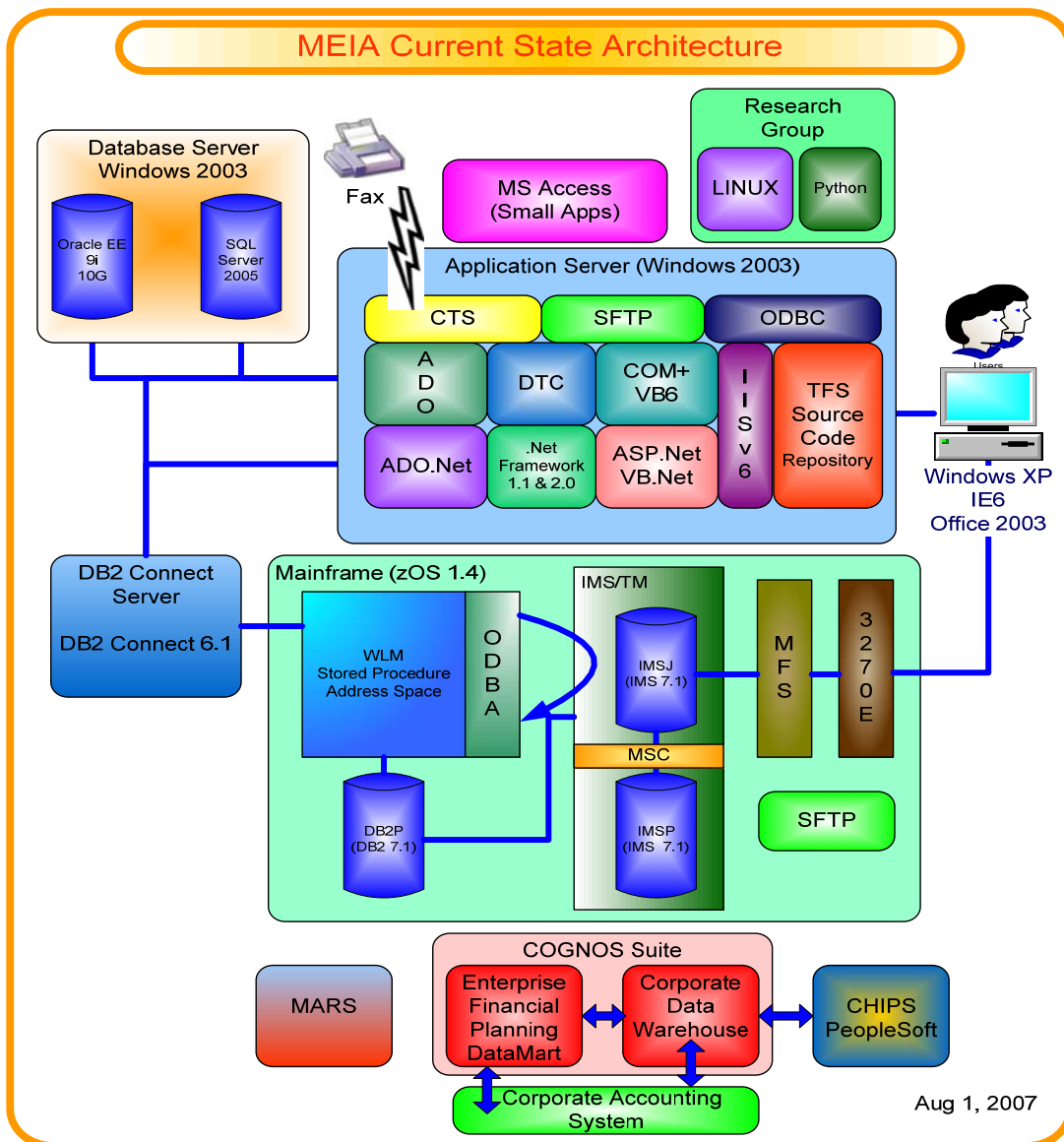
MEIA operates in the shared infrastructure environment supported by WTS.

5.2.3 MEIA APPLICATIONS

MEIA line-of-business applications are grouped into the following categories: mainframe applications, n-tier applications and client server/desktop applications.

The figure below represents a high-level overview of the existing application architecture.

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5.2.3.1 IBM MVS Mainframe Applications

MEIA's main IBM MVS mainframe application is the Management Information System, commonly known as MIS. The applications and components of MIS specific to MEIA and a diagram depicting MEIA's overall application architecture can be found in Appendix J MEIA Business Applications.

MEIA and MCFD share the MIDAS component, a custom developed set of overarching standard routines that control the MIS online transactions.

5.2.3.2 n-Tier Web Deployed Applications

n-Tier, Web Deployed Applications are predominantly newer applications within MEIA's environment and reflect its strategic technology direction for IT/IM investments. The majority of these applications are based on Microsoft .Net technology for the front-end and Oracle RDMS for the back-end database.

5.2.3.3 Client Server/Desktop Applications

There are currently nine Desktop/Client Server applications based primarily on Microsoft Access 97.

5.2.4 INTERFACES

The interface environment involves approximately fifty (50) point-to-point application interfaces to internal and external agencies with which MEIA shares information to determine program eligibility and to support service delivery. The interfaces are developed using COTS supplied APIs, custom interface application developed using MS MQ, Visual Studio .NET, PL/SQL, legacy mainframe technologies and FTP processes.

5.2.5 DATA WAREHOUSE AND BUSINESS INTELLIGENCE TOOL

Over the past few years, MEIA has successfully developed and implemented a data warehousing, business intelligence, and reporting strategy, which is illustrated in the diagram below.

MEIA Reporting Architecture

Enterprise Reporting Layer	Integrated Data Warehouse/ Cognos BI Tools				
Operational Reporting Layer	SQL	Crystal Reports	Oracle	.NET	Etc.
Application Layer	Application 1	Application 2	Application 3	Application 4	Application 5

Each system or application has standard reports using specific reporting tools supplied by the package and/or vendor. These are operational (or “canned”) reports for things such as edit results, transaction lists, journals, etc., and are represented by the operational reporting layer in the diagram above. These reports are supplied with the application and are, by definition, not customized.

The strategy adopted by MEIA for building the enterprise reporting layer (i.e. business intelligence/data warehousing and reporting strategy) is to construct data marts for each subject area, building the data warehouse component by component from the source systems. Data marts have been built for MEIA’s financial, human resources, and major operational systems, and these data marts are linked by common dimensions. The data marts are then accessed by a set of tools for reporting, multi-dimensional analysis, and dashboards/scorecards. MEIA’s plan is to continue to grow the data warehouse by adding a number of data marts corresponding to the various subject areas in the proposed Case Management System. The approach and implementation details remain to be worked out.

The fundamental reporting strategy is that MEIA is committed to having one data warehouse with the goal of ‘one version of the truth.’ To implement this strategy, MEIA has invested in and implemented the Cognos business intelligence tools. The Cognos business intelligence tools include version 8.x of Data Manager, Report Studio, Analysis Studio, and Metrics Manager.

5.3 Ministry of Children and Family Development

5.3.1 MCFD SECURITY AND ACCESS MODEL

Compliant with the Province's standards, user authorization is handled at the upper-most level by membership in active directory groups and at the application level by specific application program control based on the users ID and group membership. Within MCFD, application specific authorization is centralized and controlled by the Security Registry and web services. The MCFD Security Registry and web services provide roles based security information for all MCFD applications. Each application utilizes the information contained in the Security Registry and applies application specific business rules to further refine a user's access rights and permissions. This facility provides a single point of update and control for application authorizations. MCFD's new Security Registry is a shared building block which, together with the planned General Registration and Authorization Service, provides capabilities that can be used by all applications.

The registries have been created to provide a set of basic functions once, rather than building the capability multiple times to support each new application. The registries are architected on the principles of SOA. There are three major registries:

- The **Person Registry** provides identification and authentication functions common to all systems. It holds information identifying all persons who have contact with MCFD's clients, family members, contacts, Service Delivery Providers, professionals etc. The nature of the person's involvement is not divulged unless the person that is querying the information occupies an authorized role and has been granted access;
- The **Service Registry** provides Service Delivery Providers with information shared among all applications. It maintains the directory of services provided to MCFD and the contract information for the Service Delivery Providers; and
- The **Security Registry** provides common registration and authorization of access. It controls access to all applications, including the details of what they are permitted to see and do.

The Person Registry contains over 1.1 million records (active and inactive) receiving 1.6 million services. The Service Registry contains 55,000 records that have 48,000 contracts.

The three registries are a logical point of integration among applications throughout MCFD, and for sharing information with other ministries. The registries are providing up-to-date security and controls. This ensures that users will only see the information that they have been authorized to access.

5.3.2 MCFD OPERATING INFRASTRUCTURE

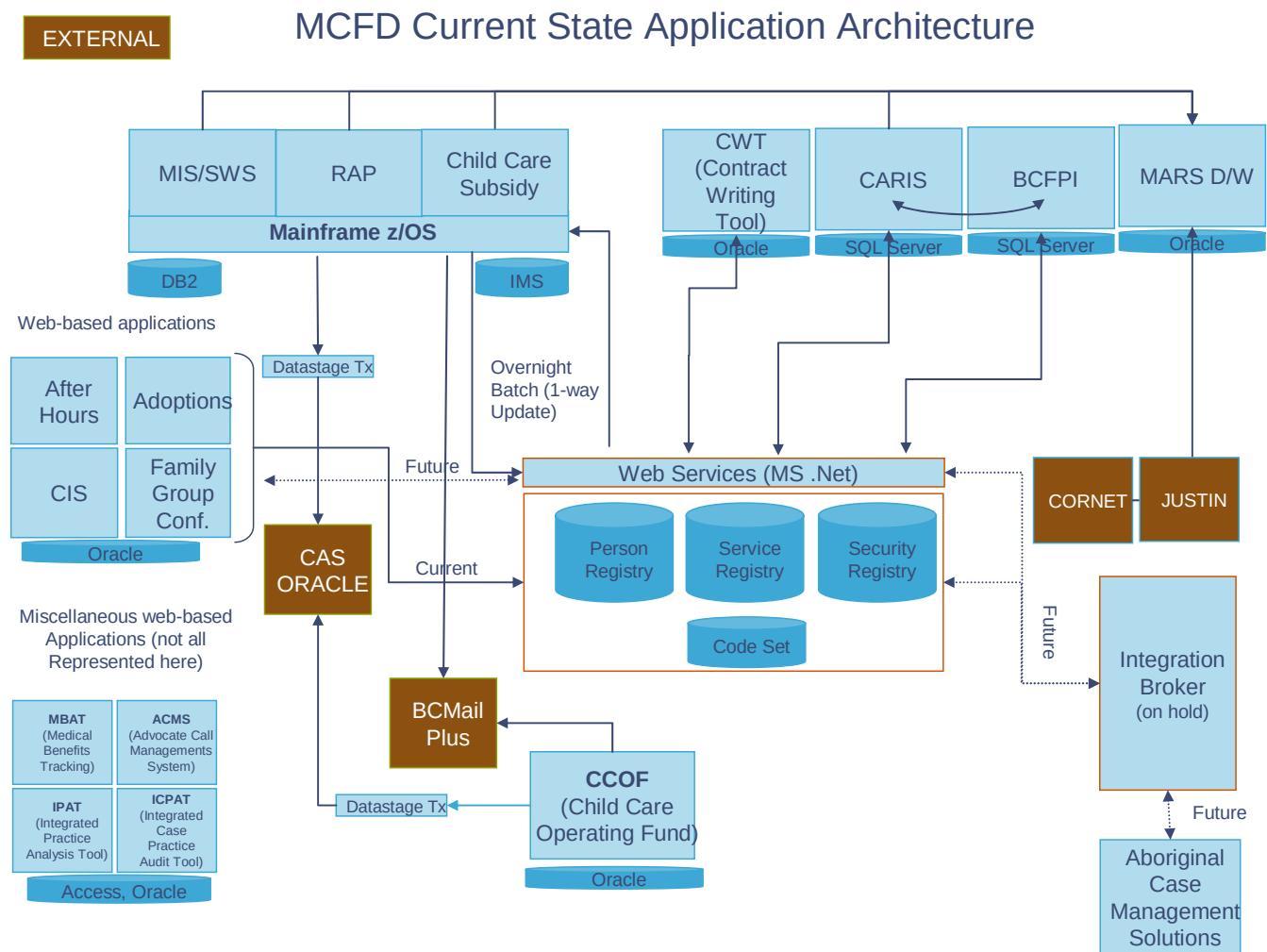
MCFD operates in the shared infrastructure environment supported by WTS.

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5.3.3 MCFD APPLICATIONS

MCFD's line-of-business applications can be grouped into the following categories: mainframe applications, n-tier applications, client server/desktop applications, registries and interfaces. The figure below represents a high-level overview of the existing application architecture.

For more information, refer to Appendix K MCFD Business Applications.



MCFD- Current state

October 11, 2007

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5.3.3.1 IBM MVS Mainframe Applications

MCFD's main IBM MVS mainframe application is the "Management Information System – Social Worker System", commonly known as MIS-SWS. MCFD shares the central registry and imprest cheque portion of this application with MEIA. MCFD and MEIA also share MIDAS, a custom developed set of overarching standard routines that control the MIS-SWS online transactions and application security.

The two main components of MIS SWS that are specific to MCFD are:

- Intake and Child Services; and
- Resource and Payment System.

There are also 14 interfaces from MIS-SWS to various other ministries, agencies and platforms. The most significant interfaces are:

- From Resource and Payment System to CAS; and
- From MIS-SWS to the Person, Service and Security registries.

For more information, refer to Appendix V MCFD Application Information Matrix.

5.3.3.2 n-Tier Web Deployed Application

n-Tier, Web Deployed Applications are predominantly newer applications within MCFD's environment and reflect MCFD's strategic technology direction for information technology and information management investments. The majority of these applications are based on Microsoft .Net technology for the front-end and Oracle RDMS for the back-end database.

MCFD currently has 22 n-tier applications and associated sub-applications with an additional 5 more in development. It is anticipated that there will be a total of 27 n-tier Web Deployed applications in production by September 2007.

MCFD has developed three .net SOA web service exposed registries. They are the Person, Service and Security registries. Most of these applications currently interface with the Security Registry, three interface with the person registry and one with the service registry. It is currently MCFD's plan to have approximately 8 of the n-tier applications interface with the person and service registries by 2007/2008.

For more information, refer to Appendix K MCFD Business Applications.

5.3.3.3 Client Server/Desktop Applications

There are currently six client server/desktop applications. These applications are primarily based on Microsoft Access 2003. None of the applications in this category are considered mission critical.

For more information, refer to Appendix K MCFD Business Applications.

5.3.4 INTERFACES

MCFD has a large number of internal and external interfaces through a wide variety of protocols from Web Services connections to flat file exchanges using FTP. Some of the most important interfaces are to CAS and internally to an MCFD XML based web service exposing the security, person and service registries.

Although the Case Management System will eventually replace some of these applications and interfaces, it is expected that many will remain and require bi-directional interfaces.

For more information, refer to Appendix V MCFD Applications Interface Matrix.

5.3.5 DATA WAREHOUSE AND BUSINESS INTELLIGENCE TOOL

MCFD’s current data warehouse and tools, “Management Analysis and Reporting System”, are inflexible and outdated. MCFD does not have user friendly tools to do performance measures. The data necessary for decision support is extracted and processed manually.

The “Management Analysis and Reporting System” environment uses Perl, shell scripts, PL/SQL, Oracle replication, FTP and FoxPro for extract transform and load, pulling data from 30 operational systems, with Oracle RDMS and FoxPro DBF's for persistent data storage. Data is updated nightly, weekly or monthly and is organized into siloed data mart areas for report building. Some transformation and integration is done for performance and cleansing reasons but is incomplete.

The Management Analysis and Reporting System environment uses FoxPro, Delphi, java script and IIS for data presentation in a web environment using a three-tier architecture. This is done with web portal, application and database servers housed behind a corporate firewall.

Security is role based and report specific using NT Authentication and is managed within the Management Analysis and Reporting System environment.

“Management Analysis and Reporting System” currently supports about 30 data marts providing an average of 25,000 reports to 750 users each month. Reports are built by the data warehouse department and then published for consumption on a web site allowing users to select parameters and filters to customize the data for their needs.

MCFD has initiated a project that utilizes the Cognos 8 business intelligence tools.

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6 Requirements

6.1 Requirements Common to Both MEIA and MCFD

6.1.1 OPERATIONAL AND TECHNICAL REQUIREMENTS

MEIA and MCFD share common operational and technical requirements, the details of which can be found in Appendix L MEIA and MCFD Operational and Technical Requirements.

6.1.2 SECURITY AND PRIVACY PROTECTION

Privacy and the protection of personal information is of paramount importance to the Province, and the sharing of information across the social sector will be undertaken in a secure manner which mitigates the risk of unauthorized access to personal information. The Office of the Chief Information Officer has developed infrastructure and standards which will ensure that only authorized individuals have access, and only to the information which they require to effectively deliver services. The Case Management Software will be implemented within this secure, privacy protected framework.

The security, access controls and privacy protection in the Case Management System for both MEIA and MCFD will be consistent with the Office of the Chief Information Officer security policies, privacy legislation, and the Province's authentication infrastructure.

Proponents should be aware that the Contract will preclude the Contractor and any of its sub-contractors from storing information outside of Canada. Further, temporarily accessing or temporarily storing personal information outside of Canada will not be permitted without the Province's prior written consent.

For more information, please see the [*Freedom of Information & Protection of Privacy Act*](#).

Office of the Chief Information Officer Information Management/Information Technology Policy

The security policy and standards will continue to be set by the Office of the Chief Information Officer. These, in conjunction with the *Freedom of Information and Protection of Privacy Act*, form the basis for the information security and privacy protection framework.

The Case Management System will be consistent with the Province's privacy legislation and existing security policies as may be amended from time to time. The Province's Government Security Policy can be found at <http://www.cio.gov.bc.ca/prgs/ManualInformationSecurityPolicyV1.pdf>.

Enterprise Security Gateway Integration

The Province has chosen to provide a single logon credential for each of its users using the Corporate Authentication directory service. A set of common directory services stores the logon credentials for each user domain. The IDIR directory service will be used for the ICM Project. It is expected that the proposed Case Management Software will provide robust access control to the data element level based on authenticated single ID and role.

The proposed Case Management Software should integrate with the Enterprise Security Gateway as specified in Appendix Q Systems Security and Network Connectivity Standards.

Potential future requirements include Security Assertion Markup Language, tokens, .NET/Directory Services or XML Access Control Markup Language.

6.1.3 GENERAL APPLICATION REQUIREMENTS

MEIA and MCFD require Case Management Software that is configurable, flexible, scalable and fits within the WTS shared services environment. There is also a requirement to support business intelligence and performance management and to be capable of integrating with other Ministry, government or Service Delivery Provider information or systems.

General application requirements are functional requirements which cut across all business areas, including case and supplier management, and generally apply to all aspects of the solution.

Below is a summary of MEIA and MCFD's general application requirements.

- **Global Capabilities**
 - o Multi-channel access for workers, clients and suppliers (e.g. web access, ability to integrate with telephone management software)
 - o Capture and manage information on individuals and organizations
 - o Data consistency and integrity
 - o Information sharing (between programs, Service Delivery Providers, other Ministries, agencies, and the client)
 - o Multilingual communication
 - o Assistive technology for persons with disabilities
 - o Workflow Integration
 - o Wizards (e.g. decision assists or online scripts)
 - o Calendaring
 - o Alerts
 - o Mobile access
 - o Bar code support
- **Tables and Rules** – tables of services, rates and codes; service and workflow business rules; and how data is displayed and validated by the system. These functions would be managed by the Province's systems administrators.
- **Security and Privacy** – manage and maintain the appropriate levels of access to information and functions using the systems internal security functionality.
- **Records Management** – view, merge, link, archive and retrieve records and maintain an audit trail of user access.
- **Correspondence and Forms** – correspond efficiently and effectively with clients, Service Delivery Providers both electronically and through traditional mail.
- **Workflow Management** – record in the system the sequence of steps required to perform a series of tasks, including approvals, notifications and client-staff-Service Delivery Provider affiliations
- **Electronic Document Management** – ability to send, receive, attach, archive and retrieve supporting documents from clients and store them in a digital format and ability to integrate with other document management systems, multi-function devices etc.
- **Appointment Scheduling** – schedule and manage appointments within the application; including the ability for clients to book their own appointments.

- **Search Capabilities** – ability to search and retrieve client/case, or Service Delivery Provider/service information whether active, closed, or archived using multiple parameters.

For more information, refer to Appendix U General Application Requirements.

6.1.4 CROSS-GOVERNMENT INFORMATION SHARING

6.1.4.1 Information Access Layer

The Province, as part of its eHealth Initiative, is developing an enterprise service bus called the Health Information Access Layer. The architecture is based on the conceptual blueprint provided by Canada Health Infoway. The Integration Infrastructure Project in the Office of the Chief Information Officer, intends for the enterprise service bus to be extended across other ministries to become the Information Access Layer (IAL). It is intended that the IAL will support the ICM Solution and will become the preferred means of integration. In the meantime, applications including the Case Management System will require the ability to support point-to-point, bi-directional data exchange and integration.

All domain (data repositories) or point of service systems that communicate with the enterprise service bus will be required to undergo a conformance process that meets provincial standards at such time as the Case Management System is integrated to the access layer. The following list of preliminary standards is not exhaustive and the Province reserves the right to publish, change or otherwise modify the conformance standards as required.

Common Services provided by the Information Access Layer

Generally, the provincial Information Access Layer will communicate using HL7 V3 for health applications and XML for non-health applications and will externally expose web services for:

- Client identity and access management;
- Service provider identity resolution;
- Guidelines for release or masking of data in the system;
- Common audit and logging; and
- Secure messaging, notification and delivery of message payloads through published/subscribed services.

Viewer

The Province will support viewer technologies utilizing both JAVA and MS SharePoint as a presentation layer through industry standard web browsers.

6.1.5 CORPORATE ACCOUNTING SERVICES' CORPORATE CONTRACT MANAGEMENT PROJECT

MEIA and MCFD are interested in Case Management Software that provides robust capability for Contract and Supplier Management. In addition, there is a mandated corporate financial contract management solution with which the proposed Case Management Software will need to integrate in future phases. Corporate Accounting Service or "CAS" has undertaken a multi-year initiative – the Corporate Contract Management Project – to implement core financial contract management functionality from the Oracle Contract Modules that will assist the Province to manage corporate contract spending and risk.

In order to maintain the integrity of the Enterprise Resource Planning (ERP) suite, all interfaces will use standard supported Oracle ERP API's and Oracle Application defined Web Services to load data and

transactions into the system. The proposed Case Management Software will need to provide a high degree of flexibility in the degree of case/contract information that can be integrated to most effectively meet the need to capture the required core information and provide effective case and contract reporting.

6.2 Ministry of Employment and Income Assistance Requirements

6.2.1 BUSINESS FUNCTION REQUIREMENTS – INTEGRATED CASE MANAGEMENT

MEIA has identified the following business function requirements. The details behind these requirements can be found in Appendix N MEIA Business Function Requirements – Case Management.

- **Request Service** – the ability to record interactions with the public. The activities initiated by an existing client, or a citizen, to request services from MEIA.
- **Identify and Evaluate Needs** – accurately capture and maintain personal information, including current and historical household and family unit associations, when citizens interact with MEIA to assist in determining the appropriate service.
- **Assess Situation and Evaluate Eligibility** – assess and evaluate individual needs and capabilities, determine which programs and services are required and establish program eligibility for Income, Disability and/or Supplementary assistance.
- **Establish Plan** – create and maintain client plans for the delivery of services including goal setting, activity planning and results tracking to support the delivery of the service, assistance or supplement for which the client has been deemed eligible.
- **Assign Resources** – identify and assign resources to fulfil the plan including calculating and scheduling payments. This includes assigning contracted resources for employment services and/or assigning financial resources for other programs and services.
- **Deliver Service**
 - **Case and Caseload Management** – monitor and manage client plans, record goal achievement, conduct file audits and investigations and record client feedback.
 - **Financial Management** – manage and track financial transactions at a client level related to MEIA delivered and funded programs and services. CAS will manage and issue payments. However, the Case Management System is expected to determine what those payments are, provide details to the financial systems and record history or payments (two-way interface).
- **Monitor Delivery**
 - The functional requirements to support this process are captured under the Case and Caseload Management section above as well as in the Reporting Requirements Section 6.2.3.
- **Review Results**
 - The functional requirements to support this process are primarily captured in the Reporting Requirements Section 6.2.3.
- **Close Case**
 - The functional requirements to support this process are captured in the General Requirements Section 6.1.3.

6.2.2 BUSINESS FUNCTION REQUIREMENTS – CONTRACT AND SUPPLIER MANAGEMENT

This section describes the requirements associated with supporting Service Delivery Providers that operate under formal contract agreements as well as managing payments to third party suppliers. Additionally, the Case Management System will need to integrate with the Corporate Contract Management Project.

MEIA has identified the following business function requirements for contract and supplier management:

- **Identify Resource Requirement** – The core requirement is an ability to maintain and manage a Service Registry which includes being able to identify what services are available, where provided, who provided by and associated attributes.
- **Acquire Resource** – The core requirement is the ability to select resources from a service registry and associate these resources with clients and services.
- **Establish Contract/Service Agreement** – The core requirement is the ability to create, review and update service agreements with goals, activities and sub-activities for suppliers of ad-hoc services. For formally contracted services, the requirement is to create an interface to the Corporate Contract Management Project. This would provide a linkage between the client and service that is tracked in the Integrated Case Management application to the agreement stored in the contract management application.
- **Financial Administration** – The core requirement is the ability to manage payment for services, either pre-, intra- or post-delivery. The payment may be a retainer to provide capacity or for service usage. Payment amounts could be fixed, variable or both, depending on the type of resource.
- **Monitor Resource Performance** – The core requirement is the ability to record and evaluate the progress and completion of Service Delivery Provider activities and achievement of goals as defined in the service agreement or contract on a real-time basis. The application should also support audit activities. For contracted services, this will require integration with data housed in the Corporate Contract Management Project. This may be accomplished through the use of the existing MEIA data warehouse and business intelligence tools.
- **Evaluate Contract/Service Agreement** – This function will support the periodic review of the services provided by a resource to ensure that quality standards and service agreement or contractual obligations are met. For contracted services, this will require integration with data housed in the contract management application.
- **Expiry or Termination of Contract or Service Agreement** – The general requirement is to support the normal expiry of a contract or service agreement and provide the ability to terminate a service agreement or contract prior to the expiry date. This includes the ability to support post-contract evaluations.

The details behind these requirements can be found in Appendix O MEIA Business Function Requirements – Contract and Supplier Management.

6.2.3 INTEGRATED CASE MANAGEMENT SOFTWARE REPORTING REQUIREMENTS

The report development and management approach will also take into consideration that core contract management information will be captured in the Corporate Contract Management Project. For some reports, particularly those supporting performance measurement and management, this information will need to be integrated with client and service information captured in the Integrated Case Management application.

From a functional operating report standpoint, MEIA's core requirements are the ability to select standardized, parameter-driven and ad hoc reports from a list; generate them in a variety of formats and export and distribute them using multi-channels as well as to be able to integrate with existing data warehouses.

6.3 Ministry of Children and Family Development

6.3.1 BUSINESS FUNCTION REQUIREMENTS – INTEGRATED CASE MANAGEMENT

MCFD operates in a complex environment. Services range from open access programs which serve the general population (e.g. Early Childhood Development and Family Support), those that are available based on particular need (e.g. Child and Youth Mental Health and Children and Youth with Special Needs), those that are non-voluntary (e.g. Child Protection), those that are court directed (e.g. Youth Justice) to institutional care (e.g. Maples or youth custody centres). The services across the range of programs may also include eligibility criteria. For details, see Appendix C MCFD Service Descriptions.

Services are delivered by a range of MCFD professional staff including psychologists, psychiatrists, clinical counsellors, social workers, probation officers, youth justice workers, nurses and therapists. In addition to direct services, MCFD contracts for a range of support services. These support services are also provided by a range of professionals. Support services can range from a variety of services across multiple programs provided by an agency to an individual who is providing foster parent services for a child.

Children, youth and families may access a number of direct or contracted MCFD services. In addition, they may also be accessing other services which are assisting in meeting their needs. Key examples include schools, income support and health services. Integrated Case Management is a practice of planning for children, youth, adults and families that encompasses a holistic approach to service delivery and includes the perspective of clients, their informal support network, and service providers and professionals simultaneously. The goal of Integrated Case Management is to improve outcomes through appropriate information sharing, improved access to effective services, and coordinated planning. MCFD requires a Case Management System which will support this integrated approach. Those individuals providing services, whether internal or external would have access to appropriate parts of a single electronic file. Access would be within a secure, privacy protecting environment. For example, a child care worker providing counselling to a youth would be able to update the progress to stated goals; while the youth's probation officer, social worker and foster parent could also update information relevant to their role but not have access to other parts of the file not relevant to their role.

The Case Management System will support information on a large number of individuals and families (clients). Some clients will be short term, some will be involved with MCFD for many years, and some will have intermittent involvement or involvement with a variety of programs. In addition, these individuals may have received services from a number of Service Delivery Providers. Individual records will be maintained for the long term. For some program areas (e.g. Adoption and Children in Care), the records maintained by MCFD are a key component of their history. The level of security and privacy required varies by program.

The Case Management System will support the work of the front-line workers, whether internal or external. The support provided by the system needs to be integral to the work, not an additional responsibility. Duplicate entry of information will be minimized in order to allow workers to focus on service to children, youth and families.

MCFD is continuously reviewing programs and services, including auditing both internal and external services. New research often leads to changes in programs. Legislative and policy changes can occur.

The details behind the MCFD requirements can be found in Appendix M MCFD Business Function Requirements – Case and Contract Management.

The following model outlines services delivered by, or on behalf of, MCFD:

Application Model for Business Systems Integration								
MCFD Functions	Application Model Major Components	Business Function Model Major Components	Information Model – Major Components*					
			Person	Case	Resource	Program	Agreement	Payment
Manage Child, Youth and Family Services	Intake, Referral, Admission, and Assessment Planning and Resourcing	1. Identify Needs	CRU*	CRU		R		
		2. Evaluate Eligibility	RU	RU	RU	R		
		3. Assess Situation	RU	RU	RU	R	R	
		4. Establish Plan	RU	CRU	R	R	R	
	Treatment, Evaluation, and Review Discharge	5. Assign Resources	R	RU	RU	R	R	
		6. Deliver Service	RU	CRU	R		R	
		7. Monitor Delivery	R	RU	R	R	R	
		8. Review Plan	R	RU	R	R	R	
		9. Close Case	RU	RU	RU		R	
Manage Contracts And Resources	Resource Management	1. Identify Resource Required		R	CRU	R	R	
		2. Monitor Resource Performance		R	R	R	R	
		3. Review Resource Performance		R	R	R	R	
	Contract Management	4. Establish Contract/Agreement			R	R	CRU	
		5. Terminate Contract/Agreement			RU		RU	
	Payment Management	6. Manage Payment		R	R		R	CRU
Manage Program Improvement	Program Management (Business Intelligence, Data Warehouse used in support of all Applications)	1. Identify Program Required		R	R	R		
		2. Establish Program				CRU		
		3. Develop Legislation/Policy				CRU		
		4. Monitor Program Performance		R	R	R		
		5. Review Program Performance		R	R	R		
		6. Close Program				RU		
* The Business Function Components Create/Read/Update (CRU) the Information Model Components (i.e. Information Subject Areas)								

6.3.2 BUSINESS FUNCTION REQUIREMENTS – CONTRACT MANAGEMENT

The Corporate Contract Management Project initiative will provide core contract management functionality for all British Columbia ministries using Oracle Contract Modules. The Case Management Software will need to integrate with the Oracle Contract Modules with respect to goods and services provided to the Province's clients by contracted Service Delivery Providers.

MCFD has the largest number of contracts in the Province. There are more than 17,000 contracts which can range from a multi-million dollar contract with a complex organization such as a Health Authority or a multi-service community organization, to a foster home agreement with an individual.

The vast majority of these contracts are for services to be provided to a child, youth or family on behalf of MCFD. For example, a region would contract with an agency to provide supports for independent living to a number of youth referred by MCFD to that agency. In order to evaluate the effectiveness or the efficiency of the contracted service, information gathered on client outcomes is critically important. Therefore, links to the case management function are critical.

Services are contracted to be provided to clients on behalf of MCFD and 70-80 percent of MCFD funding (including Community Living British Columbia) is directed to services provided through contracts. As a result, a significant amount of key information about clients, specific services received and progress originates with contracted Service Delivery Providers.

Accountability for the judicious expenditure of public funds is a core need for Contract and Supplier Management. Accountability includes electronic supports for good contracting and financial practices. In order to measure effectiveness, contract information such as global and individual information, output units, cost of service, and evaluation of outcomes will be linked to the clients served by that contract.

Details of MCFD's contract management requirements can be found in Appendix M MCFD Business Function Requirements – Case and Contract Management.

6.3.3 REPORTING REQUIREMENTS

MCFD reporting requirements are complex. There is the need to report from several perspectives. From the client perspective, information will be available on need, outcomes, planning, services accessed and overall costs. From the contract perspective, information needs to be available on services, outputs, clients, client outcomes, unit cost per client and funding levels by service. In addition, there is the requirement to configure the information in a variety of ways, such as by community or by specific need.

MCFD reporting requirements are broken into several categories. Operational reporting and the ability to extract data to a data warehouse is a high priority requirement for MCFD.

Operational reports directly support the ongoing operation of a system. They collect transactional data in order to enhance operational efficiencies. This reporting category includes transaction-level reports on matters such as financial, case management, contract management, case load, technical (i.e. system use, transaction volumes, user access) and problems (e.g. error logs, tracing, data integrity and workflow management).

Operational reports will have the ability to report across all business areas including case and Service Delivery Providers. These reports are used by people with responsibility for improving operations. They provide task-oriented line-item information on individual transactions at the very granular level of detail required for operational management. The reporting function proposed should have the ability to easily build user customizable reports as well as to generate pre-defined reports.

The proposed Case Management Software should have the ability to run operational reports on a separate application server. This will allow operational reporting not to place unnecessary loads on the application server.

Other reporting categories include budgeting, financial, planning, performance (e.g. score carding, dash boarding) and analytics.

For more information, refer to Appendix L MEIA and MCFD Operational and Technical Requirements.

6.3.4 INFORMATION MANAGEMENT REQUIREMENTS

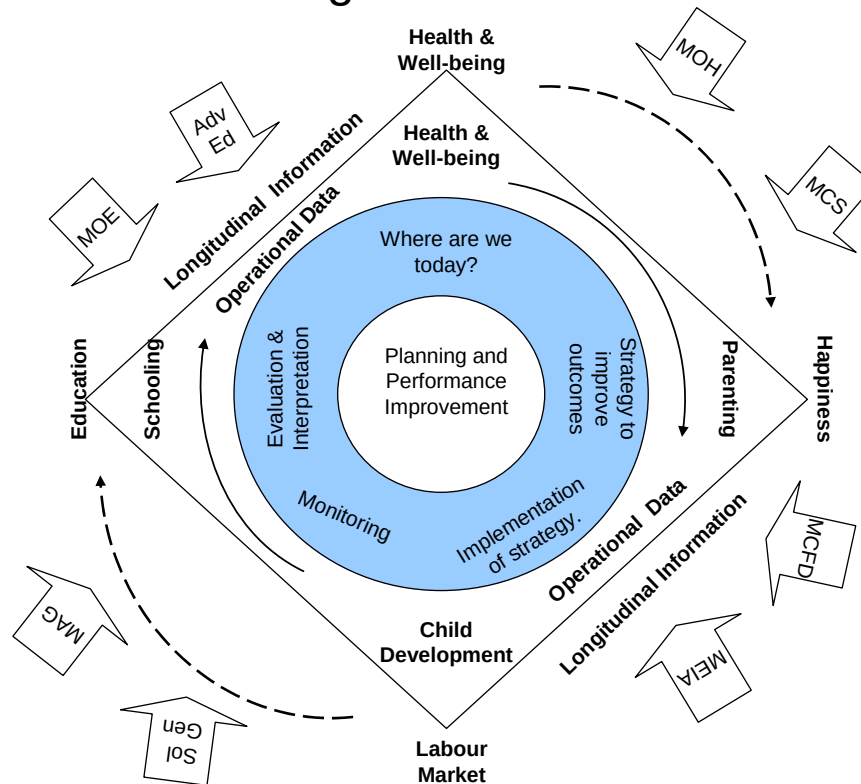
MCFD serves clients through a system of care that is holistic in nature, and responsive to their individual needs. MCFD encompasses a holistic approach to service delivery that includes the perspective and information from clients themselves, various Service Delivery Providers, and professionals simultaneously. Key decisions concerning an individual client's services will be predicated on the client's specific needs, known from all relevant information, including data from various sources, e.g. MEIA, Ministry of Education and Ministry of Health. Timely, accurate and appropriate information is critical in order to optimize the client's well-being.

Information needs to be mobilized across the social sector in order to improve health and well-being outcomes of vulnerable populations. For example, these data aggregations will require the collection of information for other sources e.g., health, education and longitudinal studies.

Note: the concepts in this section are largely applicable to MEIA as well.

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Strategic Information Management – The Big Picture for MCFD

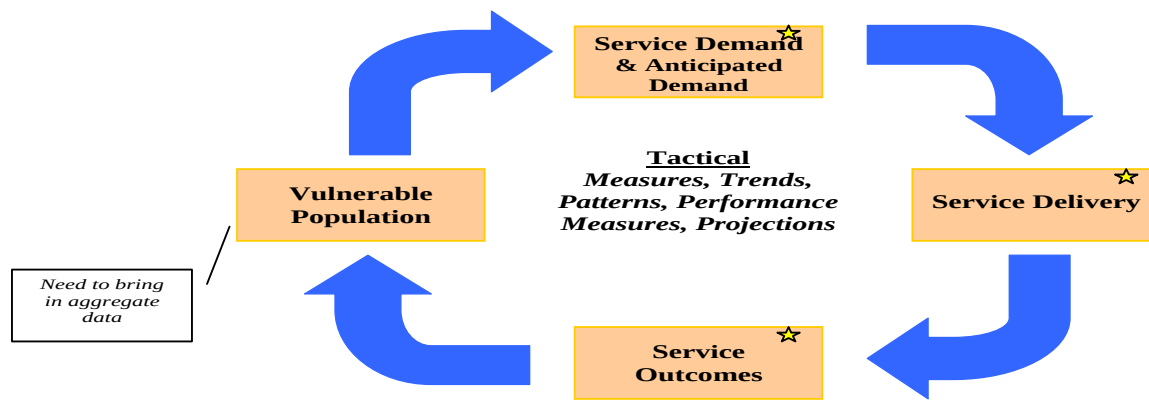


The Case Management Software will align with MCFD's overall information management needs and be able to directly deliver or export to software required to meet MCFD's business intelligence (BI) requirements for operational, tactical and strategic decision-making.

The Three BI Supports

	Operational	Tactical	Strategic
Users	Service delivery	Team Leads, Managers Research and Policy Analysts	Executive
Requirements Focus	- Instantaneous process-specific actions - Short-term client analysis	- Short-term domain specific tactics - Short-term client / program analysis - Time-series comparisons - Short-term forecasting - Departmental financial forecasts versus actuals	- Long-term corporate strategy - Long-term trend analysis - Time-series comparisons - Long-term forecasting - Corporate financials by team, geographic & temporal dimensions
Decision-Makers	Thousand	Hundreds	Tens
Data Granularity	Granular	Aggregated and granular	Highly aggregated
Data Latency	Low – days, weeks, months, process cycles	Moderate – weeks, months, quarters, business cycles	High – weeks, months, quarters, years

Source: Gile, K., Moore, C., Russom, P., & Fossner, L. (2004) Target BI Applications at the Right Organizational Layer for Maximum Adoption. Forrester Research, Inc.



Note: ★ Refers to the operational data collected by the Integrated Case Management system.

6.3.5 DATA WAREHOUSE AND BUSINESS INTELLIGENCE TOOL

MCFD's current data warehouse and tools, Management Analysis and Reporting System are inflexible and outdated.

MCFD may deploy Cognos tools for both the data warehouse and business intelligence including the extract transform and load. The underlying data is expected to be housed in the RDMS Oracle 10g r2 EE. Users need to have the ability to build their own reports and mine data for analysis without in-depth knowledge of the relational structures in the operational systems.

Cognos 8 Data Integration is expected to be the extract transform and load tool, using a change data capture methodology, near real time. The intended structure is an integrated and conformed data warehouse using a dimensional model driven by meta data. Additional software, through the Cognos API, will be used to bridge gaps in data integration functionality, such as name matching algorithms.

The main method of extraction from operational systems will be replication with change data capture performed on bulk extracts, where replication cannot be accommodated, and minimal impact to the operational system performance is a primary concern. Data will be cleansed and reviewed by a data quality unit and published into data marts along with the meta data and taxonomy to assist users to understand the data.

For more information, refer to Appendix L MEIA and MCFD Operational and Technical Requirements.

6.3.6 MCFD INTEGRATION REQUIREMENTS

MCFD wishes to deploy technology solutions and upgrades efficiently, and believes that the best way to accomplish this is to implement best-in-class commercial software using industry best practices.

MCFD clients and Service Delivery Providers should have the ability to access program information and have the ability to update their personal information, assess eligibility for program entitlements, self

manage, and self refer to services from the Province and Service Delivery Providers through multi-channel access while privacy and confidentiality of information is protected through the Province's privacy, access and security legislation and standards.

The solution should support the concept of "collect it once and use it many times". The solution is the beginning point for services and should be able to draw on and exchange data from internal and external systems (including MCFD Registries) through a standard integration broker.

MCFD has a number of legacy applications that support specific MCFD programs and services. They are typically standalone applications with their own databases. Although the solution may eventually replace some of these applications, it is expected that many will remain and require bi-directional interfaces.

The implementation of the Case Management System will likely overlap with the concurrent running of the existing legacy application for certain functionality and/or access to historical data. It is envisioned that the implementation of the solution will allow for the retirement of some of the legacy applications/functionality over time.

For more information, refer to Appendix L MEIA and MCFD Operational and Technical Requirements.

6.3.7 SERVICE DELIVERY PROVIDER REQUIREMENTS

Service Delivery Providers together with MCFD staff, deliver a range of services around the Province. It is envisioned that some or all Service Delivery Providers will require access via the internet, to use the Case Management System. Service Delivery Providers are geographically dispersed throughout the Province in locations where the bandwidth and technical infrastructure may be limited.

The extent of Service Delivery Provider use of the Case Management System will depend on the services delivered and the clients receiving those services. The Province envisions this will range from "minimal" access, "light" access to "full" access as described below.

- "Minimal" access may include 1 or 2 modules, with views of their client's information, payments and services; and access to reporting functionality for aggregate information for their agency, clients, services and programs;
- "Light" access may include access to multiple modules with limited functionality and may include, participating in case conferencing, access to scheduling, ability to view detailed client information and update, view own payment information; and access to reporting functionality for their agency, clients, services and programs; and
- "Full" access may include as similar range of functionality as MCFD staff but limited to their own clients, services and programs.

Note: these types of access functionality may also be required by MEIA and/or other organizations. It is also anticipated that the Ministry users may have varying levels of access.

7 Evaluation

This section details the process information and all of the mandatory and desirable criteria against which proposals will be evaluated. Proponents should ensure that they fully respond to all criteria in order to receive full consideration during evaluation.

7.1 Process

The evaluation process will take place over two (2) stages and will be done by a committee formed by the Province and may include employees and contractors of the Province. The Province reserves the right to change the composition of the committee between stage 1 and stage 2 in its sole discretion. Although all personnel will be bound by the same standards of confidentiality, it is the Province's intention to only allow the contracted resources described in Section A, subparagraph 5 c) to have access to the business and technical requirements portion of proposals in order to provide assistance to the Province in a limited way as subject matter experts.

7.1.1 STAGE 1 PROPOSAL EVALUATION

Stage 1 will be the evaluation of the Proponent proposals. The two highest scoring Proponents on the proposal evaluation will be short-listed and asked to present a demonstration of their Case Management Software in Victoria, British Columbia according to timelines below. Although the Province intends to short-list the two highest scoring Proponents from stage 1, the Province reserves the right to expand the short-list at its sole discretion.

7.1.2 STAGE 2 CASE MANAGEMENT SOFTWARE DEMONSTRATION EVALUATION

Short-listed Proponents will be invited to demonstrate their Case Management Software to the Province in Victoria, British Columbia. Each short-listed Proponent will be given three (3) hours to present their demonstration to the Province. It is very important that the software demonstration follow the same sequence as outlined in Appendix Y Case Management Software Demonstration Scenario. It is recommended that short-listed Proponents use Appendix Z Vendor's Guide to Case Management Software Demonstration when preparing for their demonstration.

In addition to the software demonstration, there will also be a question and answer period during the same day. Short-listed Proponents will be permitted to bring a maximum of ten (10) people to the software demonstration and should ensure the people they bring to the demonstration have adequate knowledge to answer detailed business and technical questions relating to their Case Management Software. As part of the question and answer period, short-listed Proponents will be asked to demonstrate an unscripted change to some data that is part of the demonstration scenario. In addition to the unscripted change, Proponents may also be asked to demonstrate other functionality.

Short-listed Proponents may be asked to bring a copy of their user guides and training manuals for implementation, operation and maintenance of their proposed Case Management Software.

As the demonstrations may take place over a two day period, the order in which the short-listed Proponents will present will be randomly determined by the Province. Further details of the exact time,

location and expectations during the Case Management Software demonstration will be provided to short-listed Proponents. It is the intention of the Province to notify each of the short-listed Proponents at least one week prior to the date of their Case Management Software demonstration.

7.2 Important Timelines

Date	
November 6, 2007	RFP Posted
December 20, 2007	RFP closes
January 24, 2008	Short-list notified
February 4-5, 2008	Case Management Software demonstration by short-listed Proponents in Victoria, British Columbia.
February 8, 2008	Announce successful Proponent
February 29, 2008	Contract signed

The Province reserves the right in its sole discretion to adjust these dates.

7.3 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria
1. The proposal must be received at the closing location before the specified closing time.
2. The proposal must be in English and must not be sent by mail, facsimile or e-mail.
3. Ten (10) hard copies of the proposal and one (1) copy on diskette or CDs must be submitted with one unaltered, completed Request for Proposals cover page including an originally-signed Proponent Section with the first copy.
4. A statement must be included in the proposal confirming that the Case Management Software is installed and in successful production with at least one public sector licensee having not less than 1000 users in distributed locations.

7.4 Desirable Criteria

Proposals meeting all of the mandatory criteria will be further assessed against desirable criteria. Proposals that fail to meet any minimum score below will not receive any further consideration.

Criteria – See Descriptions in Section 9	Points	Minimum score
Proponent Qualifications (Section 9.1)		
Experience Working in Social/ Human Services Sector (9.1.3)	6	4
Demonstrated Experience (9.1.4)	12	8
Company Profile (9.1.1)		
Financial Capability and Strength (9.1.2)		
Privacy Compliance (9.1.5)		
Section 9.1 subtotal	25	
Product (Section 9.2)		
Section 9.2 subtotal	30	18
Business and Technical Requirements (Section 9.3)		
General Application Requirements (9.3.1)	10	38
Business Function Requirements – Case Management (9.3.2)	20	
Business Function Requirements – Contract Management and Supplier Management (9.3.3)	10	
Operational, Technical and Integration Requirements (9.3.4)	10	
Reporting Requirements (9.3.5)	5	
Section 9.3 subtotal	55	
Pricing (Section 9.4)		
Pricing Template (9.4.1)	24	
Consulting Services Hourly Rates (9.4.2)	8	
Remaining Sections of 9.4 (9.4.3, 9.4.4, 9.4.5 and 9.4.6)	8	
Section 9.4 subtotal	40	n/a
Subtotal for Proposal	150	
Case Management Software Demonstration		
Case Management Software Demonstration subtotal	50	35
Proposal and Case Management Software Demonstration Total	200	

8 Proposal Format

The following format and sequence should be followed for both the hard copy and electronic versions of the proposal, in order to provide consistency in Proponent response and ensure each proposal receives full consideration. All pages should be consecutively numbered.

Proponents are reminded that the information requested in this RFP represents the minimum that should be provided. Appendices may be included to elaborate on a response, provided a statement in the body of the proposal clearly points the evaluators to the appropriate appendix and the specific section of the corresponding appendix.

- a) An unaltered and completed **Request for Proposals cover page**, including Proponent Section as per instructions.
- b) **Table of contents** including page numbers.
- c) A short (one or two page) summary of the key features of the proposal.
- d) The body of the proposal, including pricing, i.e. the “Proponent Response.”
- e) The Proponent Response should include the following appendices:
 - i) Appendix L Operational and Technical Requirements
 - ii) Appendix M MCFD Business Function Requirements – Case and Contract Management
 - iii) Appendix N MEIA Business Function Requirements – Case Management
 - iv) Appendix O MEIA Business Function Requirements Contract and Supplier Management
 - v) Appendix U General Application Requirements
 - vi) Appendix X Pricing Template

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9 Proponent Response Section

The following format and sequence should be used by Proponents in their responses. In order to receive full consideration during evaluation, proposals should include a detailed response to the following.

9.1 Proponent Qualifications

9.1.1 COMPANY PROFILE

In five (5) pages or less, Proponents should include a company profile that details:

- a brief introduction of the Proponent;
- the full legal name of the Proponent;
- the location of the Proponent's head office and service centres;
- location of North American offices;
- year the Proponent was established;
- numbers of employees;
- Proponent's corporate strategic direction and vision;
- corporate ownership and structure; and
- a list and brief description of any and all subcontracting arrangements relevant to the ICM Project the Proponent may have.

9.1.2 FINANCIAL CAPABILITY AND STRENGTH

Proponents should provide evidence that they are financially stable and have long-term viability in the marketplace. Audited financial statements for the past three (3) years, and/or other financial information or instruments sufficient to demonstrate financial capability to provide services associated with the contract for the ICM Project should be provided.

9.1.3 EXPERIENCE WORKING IN THE SOCIAL/HUMAN SERVICES SECTOR

Proponents should describe their understanding of the unique challenges and issues working within the public sector, in the social/human services sector and in particular with a project of similar size and scope to the one described in this procurement. In addition, Proponents should describe how their proposed Case Management Software will address the unique challenges.

Proponents should also describe, based on their experience, how their Case Management Software has addressed the requirements similar to those as specifically set out in Sections 3.1.1 and 3.2.1.

9.1.4 DEMONSTRATED EXPERIENCE

Each Proponent should provide project overviews of three (3) or more implementations of the proposed Case Management Software for large scale projects over the past five (5) years in the social/human services sector.

Proponents should include in this overview:

- Client name;
- Location and date of the implementation;
- Brief description of the project;
- Role played by the Proponent and size of their project team;
- Business processes in which the product is deployed e.g. intake, assessment, eligibility, service planning, outcome measurement etc.;
- Size and scale and scope of the implementation (number of users, number of service areas, integration with other legacy systems etc.);
- Technical environment;
- Client population (including monthly caseload) supported by the system;
- Statement that the Case Management Software is in production in any of the projects and if not, why;
- Challenges encountered; and
- Lessons learned.

For each of these projects, the Proponent should provide references (business and technical) and contact information that the Province may use to verify statements made in the proposal. References should include the name of the client organization, official contact person for the client organization, person's role on the referenced project, and contact information including street address, e-mail address and telephone number. The Province may contact these references and/or any other known references not named in the proposal without prior notice to the Proponent. The Province will not enter into a contract with any Proponent whose references, in the Province's sole opinion, are found to be unsatisfactory.

The Proponent will likely not meet the minimum score for Proponent Qualification criteria if the projects described are not of sufficient size and complexity. The Province will not evaluate proposals further if the minimum score is not met. In addition, if the Province contacts the references for the Proponents who do initially meet the minimum scores, and the references do not verify the success of the installation and production in at least one of the projects described by the Proponent in response to this section, or the references are unsatisfactory and do not verify the information above, then the score may be adjusted and the proposal will not likely meet the minimum score. The Province intends to contact references during the evaluation of these criteria but reserves the right to contact references at any stage in the evaluation of proposals.

9.1.5 PRIVACY COMPLIANCE

Proponents should provide two (2) examples of how the proposed Case Management Software enables the protection of sensitive personal information in the social/human services environment. This includes descriptions of functionality to provide protection of sensitive information and compliance with relevant legislation.

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9.2 Product

9.2.1 CASE MANAGEMENT SOFTWARE PRODUCT INFORMATION

Proponents should describe what percentage of their corporate revenue and value in Canadian dollars is driven by the proposed Case Management Software. In addition, Proponents should indicate the number of individuals in their firm who are engaged in active development of the Case Management Software being proposed. This number should include only those individuals engaged in active development of the proposed Case Management Software and NOT all developers on all products offered by the Proponent.

Proponents should briefly describe the release history of the proposed Case Management Software including initial release date, current version and the dates of all releases.

Proponents should also briefly describe the proposed Case Management Software and the versions and components currently in production. This description should include: the release date and the date it was first installed and implemented in a production environment, installed components, and the client sites where it is installed.

As noted in Section 2.8, the Province does not require the Contractor to provide source code for the Case Management Software. However, Proponents should address whether the Province will be given access to the source code for the Case Management Software and, if so, in what circumstances (e.g. to facilitate configuration, in escrow in case the Contractor ceases to exist etc.). If source code access is not provided, Proponents should describe how the Province will be assured of continuity of Contracted Services and how configuration and potential customization will be achieved as part of the larger ICM Solution.

9.2.2 RESEARCH AND DEVELOPMENT

Proponents should describe their defined research and development plan for ensuring ongoing improvements and enhancements to their Case Management Software suite. Proponents should also indicate what value, in both percentage of corporate revenue and value in Canadian dollars, was dedicated to research and development of the proposed Case Management Software in each of the last three (3) years.

9.2.3 CONSULTING SERVICES

Proponents should provide a description of how consultants (Proponent staff and independent consultants working on behalf of the Proponent) maintain the skill and knowledge levels of the Case Management Software and the tools used to implement the Case Management Software. If Proponents have a formal certification process, a description of that process should be provided, as well as the geographic distribution and availability of their consultants. For the consultant roles listed in the Appendix X Pricing Template, Proponents should provide details of the skills and experience level proposed for each required role.

9.2.4 SUPPORT SERVICES

Proponents should describe in detail the support services (other than direct Consulting Services) available both during and after implementation. This description should include, but is not limited to, the nature of services, method and point of contact, hours of availability in Pacific Standard Time (if not 24x7), expected turnaround times and escalation processes.

9.2.5 PLANNED RELEASE STRATEGY AND MAINTENANCE

The Province's expectation is that the proposed Case Management Software is only one release in a series of planned releases with future releases enhancing the functionality and usability of the Case Management System. Proponents should provide details of their release strategy including but not limited to:

- Frequency of releases and patches;
- Details of the history of releases for at least the past three (3) years;
- How future release content is determined;
- What is the minimum amount of time that a release is supported;
- How releases are managed from a customer perspective;
- Whether implementations of new releases are mandatory? If not, what are the consequences of not participating (e.g. support not available, inability to take advantage of future releases etc.); and
- What services are included in releases.

Proponents should also describe in detail what Maintenance Services will be offered to the Province for the proposed Case Management Software. This description should include information on how maintenance and new software releases are related and what types of services are offered for product upgrades and bug fixes while the Case Management Software is under warranty and after warranty expiration.

9.2.6 DOCUMENTATION

Proponents should describe their documentation including user guides for implementing, operating and maintaining the Case Management Software. Proponents should list the documentation and guides that are included as well as their table of contents. The Province may require that a copy of the above documentation be present at the Case Management Software demonstration for short-listed Proponents.

In addition, Proponents should provide details on their methodology, approach and standards for development of documentation associated with their Case Management Software including source code documentation.

9.2.7 USER INITIATED CONFIGURATION CAPABILITY

Proponents should describe how their Case Management Software will allow timely configuration changes to accommodate the unique but ever changing legislative, program and policy rules and workflows without assistance from the software supplier. Proponents should explain in detail how this

will be accomplished with their proposed Case Management Software and the level of training and expertise required to make the changes.

9.2.8 INTERACTION WITH THIRD PARTY SOFTWARE

The Province has significant investments in third party software as defined in Appendix H Government Technology Standards, Appendix I MEIA & MCFD Technology Standards and Appendix L MEIA & MCFD Operational & Technical Requirements and wishes, if possible, to use that software, particularly the Microsoft Office suite, in conjunction with the proposed Case Management Software. Proponents should indicate which of the Province's third party software products their solution readily integrates with and provide examples where this has been implemented. In addition Proponents should indicate which third party software products their solution does not integrate with.

9.2.9 SUPPORTING AND ENABLING SOFTWARE

Proponents should describe in detail any supporting and/or enabling software that is required or recommended to enable the use of the Case Management Software. Enabling and supporting software includes database software, operating systems, middleware and reporting applications etc.

9.2.10 SCALABILITY

Proponents should describe how their Case Management Software can scale from small enterprises to very large cross-ministry government wide enterprises. Proponents should describe the smallest and largest implementations of their Case Management Software including scope of implementation, jurisdiction, organization and number of users.

9.2.11 FLEXIBILITY OF PROPOSED CASE MANAGEMENT SOFTWARE

The proposed Case Management Software primarily needs to address the business and technical requirements outlined in this RFP. In addition, the Province is interested in COTS for Case Management Software which may have broader applicability to other business areas as described in Section 2.1. Proponents should describe where their solution has been implemented in other business areas. This response should include a description of the business area their Case Management Software has been installed in, the client name, the number of users of the Case Management Software for each of the clients.

9.2.12 SERVICE DELIVERY PROVIDER REQUIREMENTS

Proponents should describe how their proposed Case Management Software will deal with the unique requirements of the Service Delivery Providers. This description should include, but is not limited to, how their Case Management Software will meet the varying needs of users outlined in Section 6.3.7 and any associated technical, privacy or security considerations.

9.2.13 TRAINING

Proponents should describe their training methodology, programs, techniques and tools for training end users and certification. Details of established training manuals, training courses, duration of the courses, frequency, location where the training is offered, and a schedule of the training courses and services offered in the next twelve (12) month period is requested.

9.2.14 WARRANTY

With respect to the warranty of the Case Management Software (as described in Section 2.7), Proponents should describe how they propose, through some combination of warranty, maintenance, support and other services, to provide the Province with the assistance it requires to ensure that the Case Management Software will function properly throughout the ICM Project such that on the go-live date a then-current version of the Case Management Software will be in place with appropriate support to ensure proper functioning on an ongoing basis, with all applicable fees identified.

In addition, Proponents should describe the warranty services proposed in their offer including response times, what corrective action will be taken should issues arise, and any exceptions to the warranty coverage.

9.3 Business and Technical Requirements

When completing appendices for this section, if there are any requirements that are not met, Proponents should provide a recommended approach to meet the requirements.

9.3.1 GENERAL APPLICATION REQUIREMENTS

Proponents should complete Appendix M MCFD Business Function Requirements – Case and Contract Management and Appendix U General Application Requirements.

Additionally, the Province is particularly interested in key application features of the proposed Case Management Software. As such, Proponents should provide a detailed description of how ALL of the following key application features are addressed within their application. Responses to the bullets below will be evaluated separately from the appendix.

- Multi-channel (e.g. IVR, web, phone, fax, kiosk);
- Tables and rules (support for user controlled configuration);
- Security;
- Records management;
- Correspondence and forms;
- Workflow management (e.g. user override - an emergency need may require the worker to proceed to step 7 before completing Steps 1-6.);
- Electronic document management;
- Appointment scheduling; and
- User interface.

9.3.2 BUSINESS FUNCTION REQUIREMENTS – CASE MANAGEMENT

Proponents should complete Appendix N MEIA Business Function Requirements – Case Management, Appendix M MCFD Business Function Requirements – Case and Contract Management.

The Province is particularly interested in how the Proponent’s product will meet the aggregated requirements for BOTH MEIA and MCFD. As such, Proponents should provide a detailed description of how the proposed Case Management Software supports ALL the following key business processes, including a flexible non-linear workflow. Responses to the bullets below will be evaluated separately from the appendix.

- Request service;
- Identify needs;
- Evaluate eligibility;
- Assess situation;
- Establish plan;
- Assign resource;
- Deliver service;
- Monitor delivery;
- Review results; and
- Close case.

9.3.3 BUSINESS FUNCTION REQUIREMENT – CONTRACT MANAGEMENT AND SUPPLIER MANAGEMENT

Proponents should complete Appendix O MEIA Business Function Requirements Contract and Supplier Management and Appendix M MCFD Business Function Requirements Case and Contract Management.

The Province is particularly interested in key application features of the Proponent’s Case Management Software. As such, Proponents should provide a detailed description of how the proposed Case Management Software addresses ALL of the following features of specific interest in more detail. Responses to the bullets below will be evaluated separately from the appendix.

- Service registry (service directory/Service Delivery Providers);
- How the Case Management Software links client information to the services provided and the contract (monitoring activities, goals, outcomes, and cost for clients);
- Ability to integrate with financial management components of the Corporate Contract Management Project; and
- Performance-based management – monitoring performance of Service Delivery Providers at an individual and aggregate level.

9.3.4 OPERATIONAL, TECHNICAL AND INTEGRATION REQUIREMENTS

Proponents should complete Appendix L Operational and Technical Requirements addressing how the proposed Case Management Software will meet the operational, technical and integration requirements for MEIA, MCFD and the Service Delivery Providers.

The Province is particularly interested in key application features of the proposed Case Management Software and will evaluate the following bullets separate from the appendix. As such, Proponents should describe, preferably using examples of current implementations, how the proposed Case Management Software addresses ALL the following features of specific interest in more detail:

- **Infrastructure** – how the proposed Case Management Software will operate within the WTS environment described in Section 5.1;
- **Integration** – how the proposed Case Management Software integrates with other products and services (e.g. active directory, integration broker, open standard interfaces etc.)
- **Performance and System Availability** – how the proposed Case Management Software architecture meets the performance, scalability, availability and tiered architecture requirements. Identify any other products, tools, or utilities required to make the proposed Case Management Software fully operational in the Province’s environment.

9.3.5 REPORTING REQUIREMENTS

The Province is particularly interested in how the proposed Case Management Software manages enterprise data and delivers reports in ALL the following reporting categories. Proponents should provide a detailed description of how their Case Management Software accomplishes the following. Responses to the following will be evaluated separately from the appendix.

- Operational Support – individual client service delivery;
- Management Support – supports regional service delivery and enables decision support;
- Strategic Support – (e.g. scorecards and dashboards);
- Automatic extracting of data to a data warehouse; and
- Importing of data from outside applications into the proposed Case Management Software for reporting purposes.

9.4 Pricing

9.4.1 PRICING TEMPLATE

Proponents should complete relevant information in Appendix X to identify total costs indicating their proposed pricing model (enterprise, user seat or concurrent user or otherwise). If a Proponent enters values for more than one model, the Province will use the highest value when determining their score for this section.

9.4.1.1 Evaluation of Appendix X Pricing Template

Information from the “Pricing Template Scenario 1” and “Pricing Template Scenario 2” tabs of Appendix X will be applied to two scenarios when the Province evaluates pricing for the Case Management Software. Fees for Consulting Services (hourly rates) will be evaluated separately from scenario 1 and scenario 2 but will use the same formula to calculate points.

To evaluate “Pricing Template Scenario 1” and “Pricing Template Scenario 2” of Appendix X, a total cost will be calculated for both scenario 1 and scenario 2. Future costs in Appendix X will be discounted at 5% to calculate a present value of the total cost for both scenarios. The present value for each scenario will then be put into the formula below and the points will then be added together to determine a Proponent’s total score for section 9.4.1. Scenario 1 and scenario 2 will both account for 50% of the available points for section 9.4.1. For each scenario, the following formula will apply:

Points = lowest present value of all Proponents/ this Proponent’s present value) x available points

Scenario 1

The Province purchases:

- Licenses to support 5,500 users in the period April 1, 2008 to March 31, 2009, and Maintenance Services for those licenses beginning in April 1, 2010, continuing for four (4) full years and terminating on March 31, 2014. The Province does not expect to pay for Maintenance Services prior to the Case Management System going into production;
- A license (if applicable) to support an additional 100 users every year (i.e. adding an additional 100 users every year to the base) from April 1, 2011 to March 31, 2014 and Maintenance Services to support those users from April 2011 to March 2014; and
- Fifty (50) developer licenses (if applicable) in the period April 1, 2008 to March 31, 2009, and Maintenance Services for those licenses beginning April 1, 2008, continuing for three (3) full years and terminating in March 31, 2011.

Scenario 2

The Province purchases:

- Licenses to support 2,000 users in the period April 1, 2008 to March 31, 2009, and Maintenance Services for those licenses beginning in April 1, 2010, continuing for four (4) full years and terminating on March 31, 2014. The Province does not expect to pay for Maintenance Services prior to the Case Management System going into production;
- A license (if applicable) to support an additional 1000 users every year (i.e. adding an additional 1000 users every year to the base) from April 1, 2011 to March 31, 2014 and Maintenance Services to support those users from April 1, 2011 to March 31, 2014; and
- Ten (10) developer licenses (if applicable) in the period April 1, 2008 to March 31, 2009, and Maintenance Services for those licenses beginning April 1, 2008, continuing for three (3) full years and terminating in March 31, 2011.

The Province expects the unit price for future additional licenses to decrease, partly to encourage uptake of the product. The Province is interested in minimizing costs of Maintenance Services over the life of the Contract and intends to evaluate pricing of Maintenance Services over the life of the Contract.

Proponents should note that the Province will not pay the Contractor any additional fees (e.g. additional “one time costs”) beyond those payments that may arise for licenses and Contracted Services as specified in the Pricing Template in Appendix X. The Province will also not be obligated to enter into a Contract with the Proponent submitting the lowest-priced proposal, or any Proponent submitting a proposal in response to this RFP. This high-level outline of how pricing will be evaluated does not commit the Province to purchasing any volume of Case Management Software licenses or any other related services.

9.4.2 CONSULTING SERVICES HOURLY RATES

Proponents should complete the tab ‘Consulting Services’ in Appendix X indicating **hourly rates** for all resources based on the following scenario:

- 10,000 hours of Consulting Services to be purchased between April 1, 2008 and March 31, 2009;
- 10,000 hours of Consulting Services to be purchased between April 1, 2009 and March 31, 2010; and
- 5,000 hours of Consulting Services to be purchased between April 1, 2010 and March 31, 2011.

With respect to resource utilization, Proponents should assume equal utilization for each resource type listed on the ‘Consulting Services’ tab in Appendix X Pricing Template.

Proponents should note that these numbers and dates for Consulting Services are for the purpose of evaluation only and the Province may require more or less Consulting Services during the Contract.

If an hourly rate is not provided for any of the listed resources on Appendix X, the Province will use the highest hourly rate listed when calculating points.

9.4.3 PRICING BREAKDOWN – PERPETUAL LICENSE FEES

The Province is interested in understanding how Proponents arrived at a price for Scenario 1 and Scenario 2 for the initial purchase of a license to support the 5,500 and 2000 MCFD and MEIA users. Proponents should provide a detailed breakdown of how they arrived at their price for the initial license (including developer licenses), the price for supporting additional users in the following years, and Maintenance Services as indicated on Appendix X Pricing Template. Proponents should also specify what software modules (if relevant) are included in the proposed pricing.

9.4.4 VOLUME DISCOUNTS – PERPETUAL LICENSE FEES

Proponents should describe any volume discounts beyond the initial purchase of 5,500 and 2000 user licenses (or equivalent concurrent users) that they indicated on Appendix X Pricing Template.

9.4.5 SERVICE DELIVERY PROVIDER LICENSES

Proponents should describe how they will provide innovative pricing for the Service Delivery Provider licenses (see Section 6.3.7 Service Delivery Provider Requirements). There could be approximately 20,000 Service Delivery Providers who may access the ICM Solution in later phases. With the pricing for Service Delivery Providers, there should be an indication of volume discounts in 100 license increments for “full”, “light” and “minimal” users considering that all Service Delivery Providers would not need access to all functions of the ICM Solution.

9.4.6 PUBLIC ACCESS

Proponents should describe their approach to provide public access for limited functionality (e.g. address updates and preliminary benefits eligibility), and any associated licensing costs.

10 Appendices

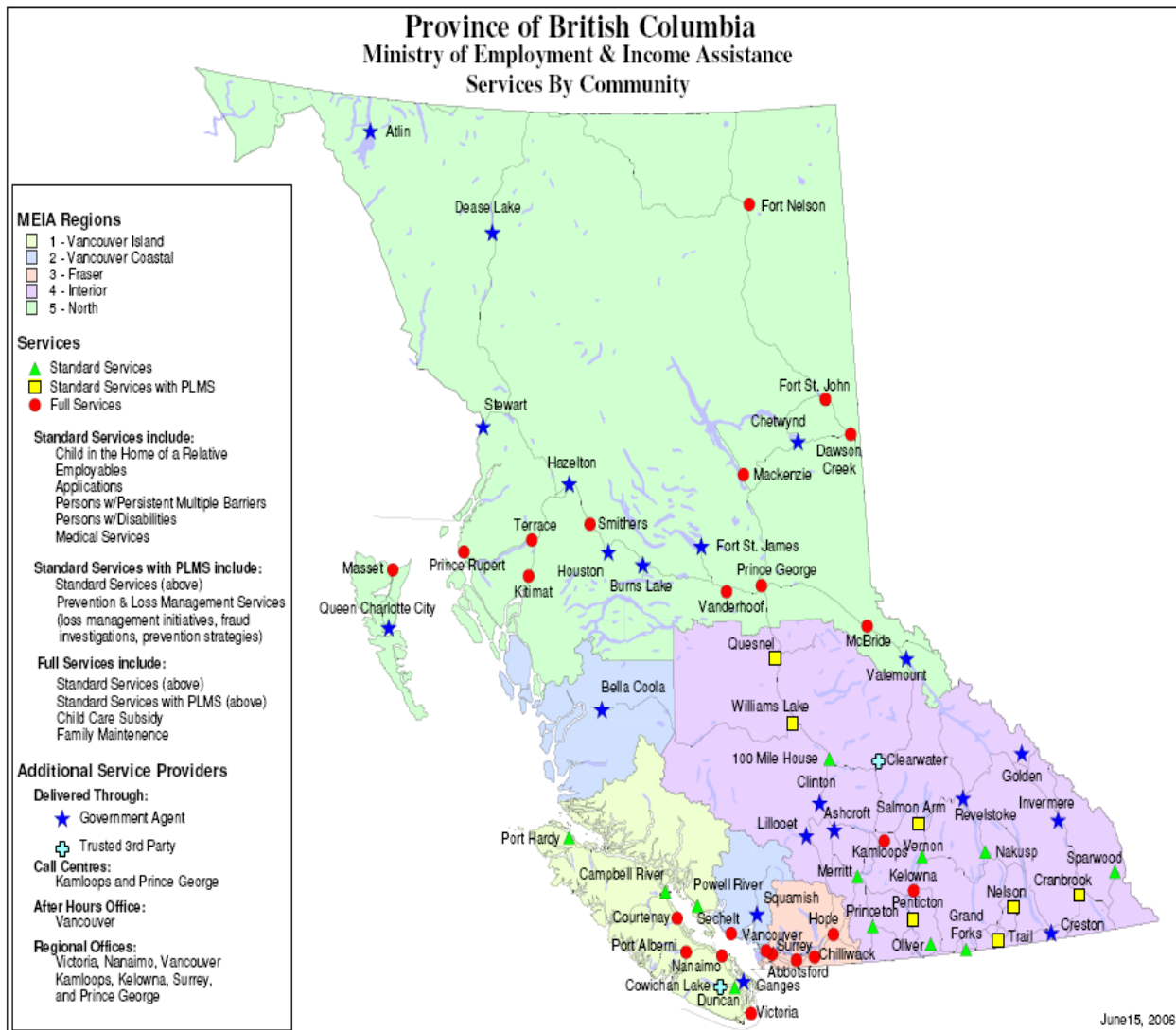
Appendix A	Contract Terms and Conditions
Appendix B	Service Maps
Appendix C	MCFD Service Descriptions
Appendix D	Relevant Web Links
Appendix E	Relevant Legislation
Appendix F	MEIA Process Flow Diagrams and Descriptions
Appendix G	MCFD Business Process Detailed Descriptions
Appendix H	Government Technology Standards
Appendix I	MEIA and MCFD Technology Standards
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Appendix L	MEIA and MCFD Operational and Technical Requirements
Appendix M	MCFD Business Function Requirements – Case and Contract Management
Appendix N	MEIA Business Function Requirements – Case Management
Appendix O	MEIA Business Function Requirements – Contract and Supplier Management
Appendix P	Future State Scenario
Appendix Q	Systems Security and Network Connectivity Standards
Appendix R	MEIA Volume Snapshot
Appendix S	MCFD Volume Snapshot
Appendix T	Privacy Protection Schedule
Appendix U	General Application Requirements
Appendix V	MCFD Application Interface Matrix
Appendix W	Receipt Confirmation Form
Appendix X	Pricing Template
Appendix Y	Case Management Software Demonstration Scenario
Appendix Z	Vendor’s Guide to Case Management Software Demonstration

Appendix A Contract Terms and Conditions

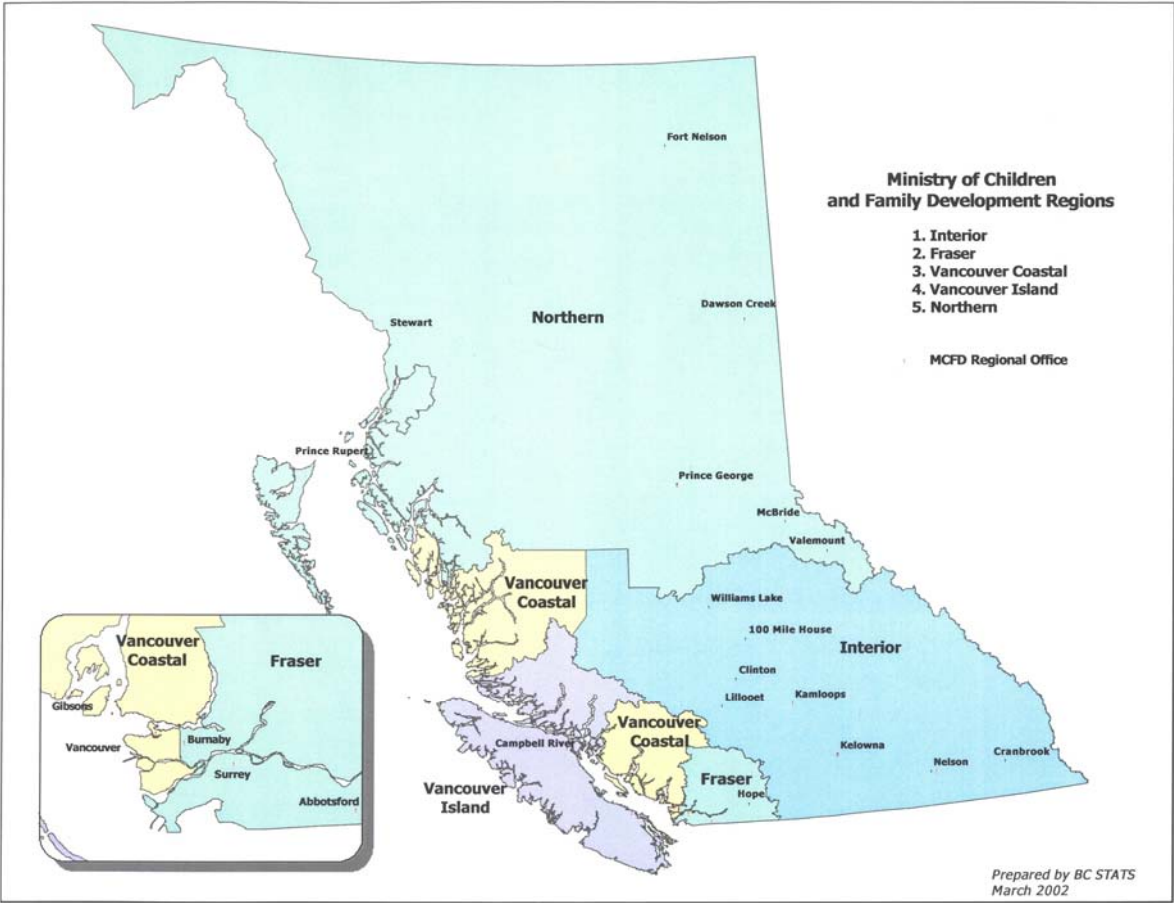
This Appendix is provided in a separate document.

Appendix B Service Maps

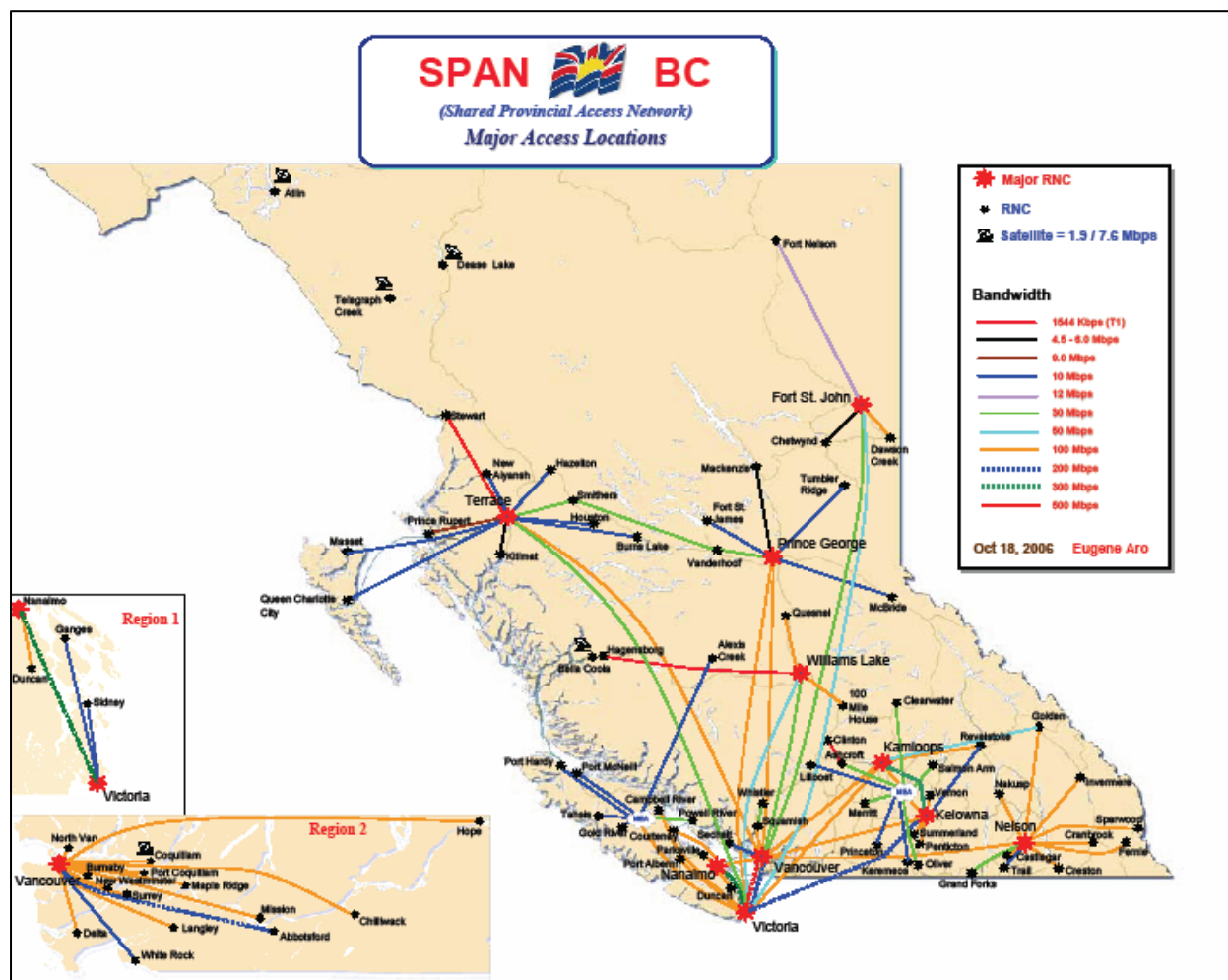
MEIA Services by Community



Map of MCFD Regions



Map of Span BC



Appendix C MCFD Service Descriptions

This Appendix is provided in a separate document.

Appendix D Relevant Web Links

Service Plan – All Ministry Service Plans

<http://www.bcbudget.gov.bc.ca/2007/serviceplans.htm>

Service Plan – specific to MCFD

<http://www.bcbudget.gov.bc.ca/2007/sp/cfd/>

http://www.corporate.gov.bc.ca//SP_brochures/CFD_brochure.pdf

Service Plan – specific to MEIA

<http://www.bcbudget.gov.bc.ca/2007/sp/pdf/ministry/eia.pdf>

http://www.corporate.gov.bc.ca//SP_brochures/EIA_brochure.pdf

Child and Youth Officer - home page -

http://www.gov.bc.ca/cyo/default_menu_js.htm

MCFD internet home page – access to information on programs and services (for example, child care, youth justice, children and youth with special needs, adoption, etc.)

<http://www.mcf.gov.bc.ca>

MEIA internet home page:

<http://www.eia.gov.bc.ca>

Government Core Policy and Procedures manual

<http://www.fin.gov.bc.ca/ocg/fmb/manuals/CPM/CPMtoc.htm>

Home page for Community Living BC

<http://www.communitylivingbc.ca/>

Example of MCFD standards (child protection)

http://www.mcf.gov.bc.ca/child_protection/pdf/cfd_ss_july04.pdf

Gove – report that led to the formation of MCFD

<http://www.qp.gov.bc.ca/gove/gove.htm>

Legislation and other government publications

<http://www.publications.gov.bc.ca/search.aspx>

http://www.qp.gov.bc.ca/statreg/list_statreg.htm#actsf

Office of the Chief Information Officer Security Policy

<http://www.cio.gov.bc.ca/prgs/ManualInformationSecurityPolicyV1.pdf>

Government Technology Standards

<http://www.cio.gov.bc.ca/prgs/standards.htm>

<http://www.net.gov.bc.ca/remote/vpn.html>

Hughes Report

http://www.childyouthreview.ca/down/BC_Children_and_Youth_Review_Report_FINAL_April_4.pdf

MEIA public-view On-line Resource (policy manual)
<http://www.gov.bc.ca/bvprd/bc/or/home.do#>

BC Employment and Assistance Caseload Statistics
<http://www.eia.gov.bc.ca/research/>

Web Orientation and Income Estimator
<http://www.weborientation.gov.bc.ca/>

The Province's Information Management and Information Technology Standards and Guidelines
http://www.cio.gov.bc.ca/IT_Standards/index.htm.

Freedom of Information and Protection of Privacy Policy and Procedures Manual
<http://www.mser.gov.bc.ca/privacyaccess/manual/toc.htm>

Appendix E Relevant Legislation

Legislation applicable to MEIA and MCFD

Ministry operations are conducted within a financial and administrative framework defined by the following provincial legislation:

- *Auditor General Act*
- *Balanced Budget and Ministerial Accountability Act*
- *Budget Transparency and Accountability Act*
- *Document Disposal Act*
- *Emergency Program Act*
- *Freedom of Information and Protection of Privacy Act*
- *Financial Administration Act*
- *Financial Information Act*
- *Interpretation Act*
- *Procurement Services Act*
- *Supply Act*

Legislation specific to MEIA

The *Employment and Assistance Act* and the *Employment and Assistance for Persons with Disabilities Act* and companion regulations provide the legislative authority for the provision of BC Employment and Assistance programs.

Policy sets out MEIA's intent with respect to these Acts and Regulations and provides guidelines to assist MEIA staff in the provision of MEIA services. Policy is provided to staff and the public through the On-line Resource. Policy is not law.

Legislation specific to MCFD

MCFD administers the following legislation and accompanying regulations in support of its mandate, statutory responsibilities and activities:

- *Adoption Act*
- *Child Care BC Act*
- *Child Care Subsidy Act* *Child, Family and Community Service Act*,
- *Child, Family, and Community Service Act*
- *Community Living Authority Act*
- *Community Services Interim Authorities Act*
- *Correction Act* (as it pertains to young persons only)
- *Health and Social Services Delivery Improvement Act*
- *Human Resource Facility Act*
- *Social Workers Act* (including Rules of the Board of Registration for Social Workers)
- *Youth Justice Act*.

While administering services, MCFD must also adhere to relevant provisions in the following provincial and federal legislation:

- Child Care Licensing Regulations
- *Community Care and Assisted Living Act*
- *Coroners Act*
- *Criminal Records Review Act*
- *Evidence Act*
- *Family Relations Act*
- *Forensic Psychiatry Act*
- *Health Act*
- *Infants Act*
- *Immigration and Refugee Protection Act (Canada)*
- *Mental Health Act*
- *Ombudsman Act*
- *Public Guardian and Trustee Act*
- *Representative for Children and Youth Act*
- *Young Offenders Act (Canada)*
- *Youth Criminal Justice Act (Canada)*

MCFD has established policies and standards for staff. As an example, see http://www.mcf.gov.bc.ca/child_protection/pdf/cfd_ss_july04.pdf for MCFD's child protection standards.

Appendix F MEIA Process Flow Diagrams and Descriptions

This Appendix is provided in a separate document.

Appendix G MCFD Business Process Detailed Descriptions

This Appendix is provided in a separate document.

Appendix H Government Technology Standards

This Appendix is provided in a separate document.

Appendix I MEIA and MCFD Technology Standards

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Appendix J MEIA Business Applications

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Appendix K MCFD Business Applications

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Appendix L MEIA and MCFD Operational and Technical Requirements

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Appendix M MCFD Business Function Requirements – Case and Contract Management

This Appendix is provided in a separate document.

Appendix N MEIA Business Function Requirements – Case Management

This Appendix is provided in a separate document.

Appendix O MEIA Business Function Requirements – Contract and Supplier Management

This Appendix is provided in a separate document.

Appendix P Future State Scenario

This Appendix is provided in a separate document.

Appendix Q Systems Security and Network Connectivity Standards

This Appendix is provided in a separate document.

Appendix R MEIA Volume Snapshot

Caseload Statistics⁴			
Description	Number	Description	Timeframe
ETW – Expected to Work	16,872		2006 Annual Average
ETW-MC – Expected to Work with Medical Condition	6,782		2006 Annual Average
TE – Temporarily Excused	6,299		2006 Annual Average
PPMB – Persons with Persistent Multiple Barriers	7,752		2006 Annual Average
Persons with Disabilities	59,493		2006 Annual Average
Temporary Assistance – CIHR – Child in Home of Relative	4,705		2006 Annual Average
New cases – overall	2,202	# of new cases opened per month	2006 monthly average
Recurring cases – overall	1,750	# of re-opened cases per month	2006 monthly average
Number of Clients			
ETW – Expected to Work	27,272		2006 Annual Average
ETW-MC – Expected to Work with Medical Condition	8,824		2006 Annual Average
TE – Temporarily Excused	14,960		2006 Annual Average
PPMB – Persons with Persistent Multiple Barriers	9,754		2006 Annual Average
Temporary Assistance – Persons with Disabilities	71,783		2006 Annual Average
Temporary Assistance – CIHR – Child in Home of Relative	4,705		2006 Annual Average
New clients	3,178	# of new clients per month	2006 monthly average
Recurring clients	2,675	# of return clients per month	2006 monthly average
Total Clients (including Long Term Care and Medical Services Only)	160,000	Approximate	2006 monthly average

⁴ These statistics are not intended to reflect workload, rather indicate volumes in various service groupings.

Appendix S MCFD Volume Snapshot

Caseload Stats ⁵	Number	Description	Year
Child and Family Development			
# of intakes ⁶	30,507	Total Protection Reports by Request Date	2005/06
# of investigations ⁷	17,249	Investigations completed	2005/06
# of Family Service cases	15,633	FS files open at the end of March	2005/06
# of children in care ⁸	9,157	# of CIC Annual (end of March)	2005/06
# of adoptions	280	Placements	2005/06
Youth Justice			
# of youth served ⁹	4,179	Adm. To custody and community	2005/06
# of Intensive Support and Supervision orders	247	Average Daily Count of youth served	2005/06
Children and Youth with Special Needs			
# of CYSN children served	18,000	Approximation	Current year
# of CYSN children in care	390	Forecast Average Annual	2006/07
Child and Youth Mental Health			
# of CYMH children served	5,905	Unique Client Count	2004
Child Care			
# of distinct families receiving child care subsidy	31,916 29,647 22,612 30,628	All numbers based on claim date	2003/04 2004/05 2005/06 2006/07*YTD *April 2006 to Dec 2006
Crisis Response			
# of After Hours calls	73,733 2,288	for MCFD Services for MEIA services	Sept 1 2005 to Aug 31 2006
# of After Hours	7,885		Sept 1 2005 to Aug

⁵ These statistics are not intended to reflect workload, but do provide an indication of volumes in various service groupings.

⁶ The volume of calls will be larger as all calls do not result in an intake.

⁷ Historical information is held across all areas. . Therefore, volume to be supported by a system increases over time.

⁸ As families are reunited and other children come into care, the numbers served over an average year is close to 12,000.

⁹ There were 4,179 distinct youths *with activities in the youth justice system in 2005/06.

(* with activities includes youths with an admission, discharge, transfer, escape or capture recorded in the system)

alerts			31 2006
# of After Hours memos	48,869		Sept 1 2005 to Aug 31 2006
# of After Hours removals	462		Sept 1 2005 to Aug 31 2006
Contracts			
# of Contracts	12,812	excluding Foster Parents	2005/06 YTD Dec 2005
# of Foster Parent contracts	4,864	Foster Contracts or agreements	2005/06 YTD Dec 2005
Value of all Contracts	Over Half a Billion	Including Foster Parents	2005/06 YTD Dec 2005
Other			
# of FTEs	4,253		September 2007
# of staff	4,525		September 2007
# of staff in Aboriginal delegated agencies using MCFD systems	296		Current year
# of non-staff using MCFD systems	328		Current year
# of Ministry offices ¹⁰	212		September 2007
# of FOI requests	1,426 1,293 1,441		2006 2005 2004

¹⁰ Does not include staff working from community locations

Appendix T Privacy Protection Schedule

This Appendix is provided in a separate document.

Appendix U General Application Requirements

This Appendix is provided in a separate document.

Appendix V MCFD Application Interface Matrix

This Appendix is provided in a separate document.

Appendix W Receipt Confirmation Form

Case Management Software

Ministry of Employment and Income Assistance Request for Proposals Number: SATP-239

Issue date: November 6, 2007

Closing Time: Proposal must be received before 2:00 PM Pacific Time on: December 20, 2007

For any further distributed information about this Request for Proposals,
please return this form by fax or email as soon as possible to:

Brad Boquist
Director, Procurement
Strategic Acquisitions and Technology Procurement Branch
c/o 2nd Floor 563 Superior Street
Victoria, B.C. V8V 1T7
Attention: Brad Boquist
Email: pcadmin@gov.bc.ca
Fax: 250-952-6627

COMPANY: _____

STREET ADDRESS: _____

CITY: _____ **POSTAL/ZIP CODE:** _____

PROVINCE/STATE: _____ **COUNTRY:** _____

MAILING ADDRESS, IF DIFFERENT: _____

FAX NUMBER: (____) _____ **PHONE NUMBER:** (____) _____

CONTACT PERSON: _____

TITLE: _____

E-MAIL ADDRESS: _____

Suppliers: Please note all subsequent information will ONLY be posted on BC Bid

Appendix X Pricing Template

This Appendix is provided in a separate document.

Appendix Y Case Management Software Demonstration Scenario

This Appendix is provided in a separate document.

Appendix Z Vendor's Guide to Case Management Software Demonstration

This Appendix is provided in a separate document.