



Social Program Engagement

A new paradigm for Health &
Human Services agencies





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Executive Summary



In the opening years of the 21st century many enterprises have begun to recognize and act on the need for a major evolution in their IT strategy. After decades of creating and refining Systems of Record built around data and process-centric views of work, enterprises now find that approach running out of road. New and disruptive technologies, business demands, and expectations from employees, partners, and clients have all brought into focus the opportunity and need for a new approach better suited to the age of mobile devices.

To find a response, IT departments started updating their approach from a mindset of implementing Systems of Record to one of creating Systems of Engagement and systems of understanding/intelligence. Doing so shifted the center of gravity from the server room out to the real world where existing IT investments can find new value. The change is already well underway in the commercial space.

Corporations are creating new systems that support employees, partners, and customers on their terms in the time and place that meets their need. With a design approach that has shifted from inside-out to outside-in, companies are re-inventing how services are delivered, how customers are supported, and how more flexibility, efficiency, insight, and satisfaction can be offered with fewer resources.

Systems of engagement are focused on enabling people to receive information or complete tasks in moments of need as opposed to housing large amounts of data or processing transactions at scale. This new paradigm involves providing modern user experience technologies and data access to people when they need it, and how they need it. This enables them to be more informed and productive. Investment in engagement is proving to deliver business value for human services organizations while addressing the universal questions of “why is the technology I use at work harder to use than the technology I use at home?” and “why is interacting with government so much harder than banking or paying a bill?”.

Health & Human Services (HHS) agencies with significant investments in back-office systems and business process definition are well positioned to realize similar benefits by leveraging the social program engagement model, which defines a holistic approach towards citizen/worker engagement, leveraging digital devices, machine learning and analytics to improve service delivery and client and program outcomes.

Introduction

In recent years IT organizations have begun a fundamental evolution from delivering and maintaining data centric, structured and transactional systems (Systems of Record) to user centric, collaborative and contextual task-oriented systems. The change has been driven by the emergence of new technologies such as mobile devices, cloud computing, machine learning, artificial intelligence and social networking and by relentless pressure on organizations to do more with less.

Industry analyst Geoffrey Moore(1) coined the term System of Engagement to categorize this user- centric approach.

The evolution from Systems of Record to Systems of Engagement has been well underway in commercial industries, and the benefits across the board are profound. To look briefly at one sector, banks have progressed from delivering services primarily through employees in offices with limited hours to offering 24-hour automated teller machines and then on to providing services through mobile devices. At each step along the way, the banks have successfully reduced costs while improving ease of access and flexibility for their customers. Notably, the three main traditional costs and constraints to customer support are sidestepped: geographic (too few offices), temporal (too few hours), and logistical (too few tellers).

Ultimately, we see here a shift from a scarcity model rooted in how to deliver services under a fixed set of constraints to an innovation model based on how to meet customer needs in new and better ways. The constraints which defined the old system are made irrelevant in the new one.

For Health & Human Services, the Social Program Engagement model offers a similar opportunity to move goals from focusing on managing agency resources and limitations, to providing clients and agency staff what they need in the moment of need.

To do so, agencies would do well to apply lessons from the commercial world as they create Systems of Engagement and Systems of Intelligence suited to their requirements.

Social program engagement as a model is based on Geoffrey Moore's digital systems Maturity Model (5) but focusses exclusively on solving the challenges of the Health and Human Services domain

"For too long, the government has employed 20th century tools to solve 21st century problems. We fell behind in making the smart investments in technology that yield productivity gains in the private sector every day."

Steven VanRoekel
Federal Chief Information
Officer of the United States

Social Program Engagement

A New Paradigm

Why Traditional IT systems in the Health and Human Services domain, like any other first-generation IT systems focused on transactional and legislative aspects of benefit and service delivery to Citizens. These IT systems have robust but inward-looking functionality that focused on how to translate the rules and regulations around eligibility and associated data management functions into an IT system. The focus, as was the norm with these Systems of Record, was on the administrative aspects of program delivery. Over the last decade and a half, digital technologies have forced a fundamental rethink in terms of how IT systems need to be more aligned with the needs of the users and customers and shift away from the transactional SOR systems.

Systems of engagement, focusing on key moments in the service delivery journey combined with systems of intelligence, contextualizing the IT systems to deliver the right data and process workflows for each specific moment opens the door to a fundamental shift towards a citizen and outcome focused approach for HHS agencies. SOR data can be processed to provide personalized, tailored services for citizens in need.

It is also important to design these engagement experiences from ground up, to suit the channel of delivery. As an example, making a legacy web application available on a mobile device does not move the needle much in terms of engaging in the moment of need. Engagement systems need to be specific to the use case, in the moment.

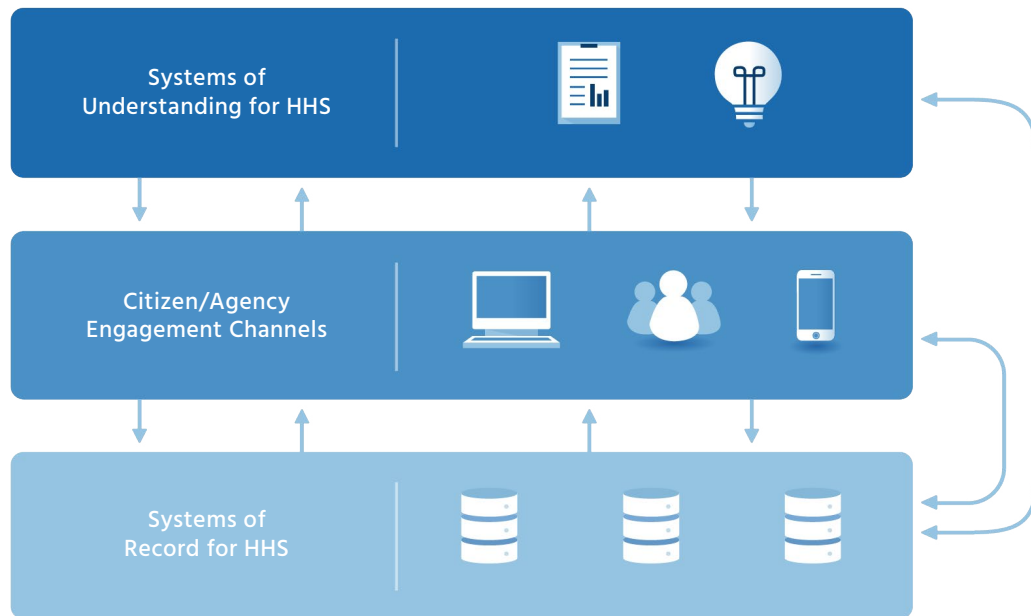
What Placing citizen/client experiences at the core of designing the new engagement solutions will drastically improve the communication, collaboration and context in which HHS agencies deliver services to people in need and how these agencies equip and empower their workers with the right digital tools to shift their focus from administrative tasks to their clients in need.

Social Program Engagement (SPE) is a business strategy used by Government and NGO organizations to improve social outcomes for clients while improving worker efficiencies and productivity. SPE software solutions enable this strategy by providing context relevant functionality and information at times of need and when making key decisions.

SPE systems combine systems of engagement that utilize the power of digital devices such as mobile phones, with systems of understanding, which utilize artificial intelligence (AI) techniques such as machine learning as well as analytics to provide the right context from the right data source at the right moment.

As an example, imagine a child welfare worker using a system of engagement built to work with their smartphone/tablet to access time critical information about an alleged maltreater's criminal records, as they are investigating a child abuse case in the field. Imagine a system of intelligence looking at prior history and allegations to provide contextual data about the level of risk to the child in question.

In another context, imagine a citizen availing of SNAP/TANF benefits getting a notification on their smartphones from the HHS agency about their next payment and possible options for alternate services such as food banks and job training services. All such use cases can be made possible by leveraging the social program engagement model as a strategy to put clients and agency workers in focus and designing systems around their moments of need and decision.



Social Program Engagement - Conceptual Architecture

How and When

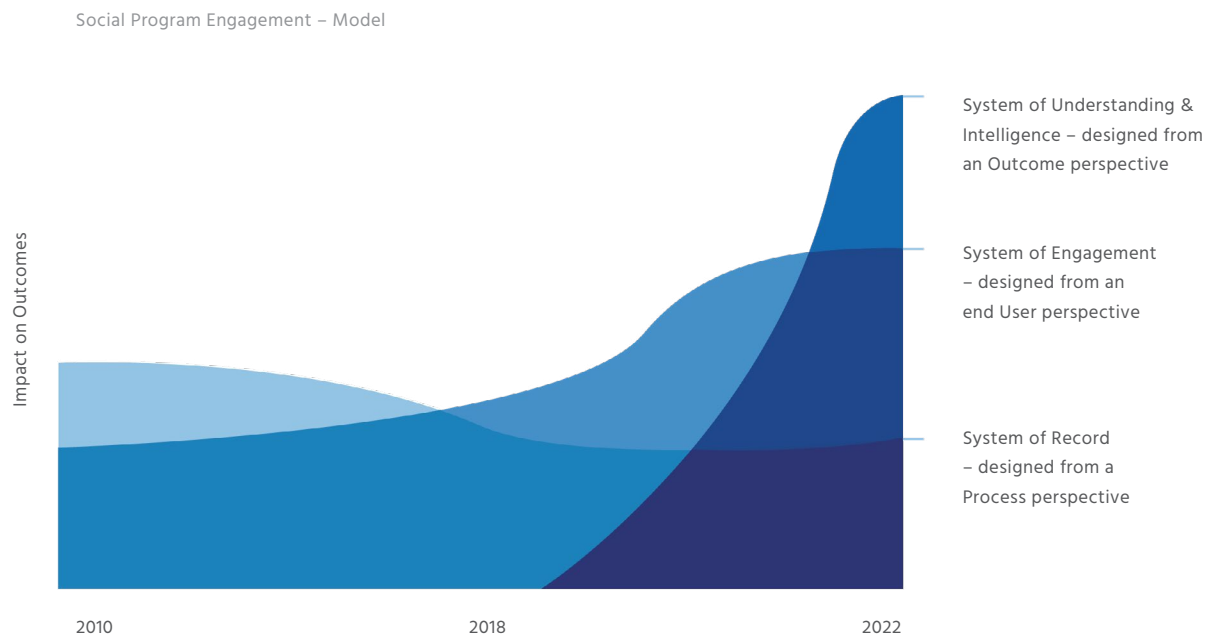
Social Program Engagement (SPE) systems follow certain core principles/tenets as articulated below. SPE systems are specifically designed for the HHS (Health & Human Services) domain and have two goals around engagement.

- Simplify interaction with social service agencies for citizens using their digital devices, anytime/anywhere
- Enable case workers and supervisors to foster deeper/more personal engagement and collaboration with the clients who need their time the most using digital technologies

SPE systems provide new ways of engagement using digital technologies and channels such as cloud, mobile and analytics. SPE systems are designed to help HHS agency workers, providers and citizens/clients interact and collaborate to drive and improve service delivery outcomes. As engagement systems focus on user experience and providing the right data and information “in the moment of need”, they hide the complexity of enterprise systems of record such as case management, document management

systems behind well-defined APIs/Interfaces. SPE systems enable incremental transformation of legacy systems while enhancing “customer experience”, by keeping the user engagement experience constant while backend legacy systems are modernised “incrementally”. SPE systems can be introduced at anytime and can interact with multiple disparate Systems Of Record and add additional layers of engagement/interaction over time.

By understanding SPE system usage analytics (also known as engagement analytics), HHS agencies can tailor their engagement systems to make high usage functions more easily accessible. As SPE systems evolve from engagement, additional capabilities to improve effectiveness of service delivery can be introduced through Systems of Understanding (SOU). These SOUs make use of artificial intelligence and analytics to provide relevant context and analysis during key moments of interaction.



As with all systems, SPE systems can be matured over a period of time, to enable HHS agencies to start with quick win type use cases and add additional layers of functionality over time. Typical SPE system maturity life cycle can follow along the suggested path below.

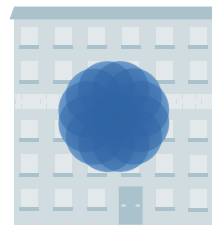
- Start with key “moments of need/decision” (use cases where engagement through mobile devices can provide better service to citizens/make HHS workers more effective)
- Continue to leverage legacy investments to do the heavy lifting in terms of workflows/eligibility etc.
- Refine based on the “engagement feedback loop” to transform business processes
- Move from a transactional engagement to a holistic (customer centric) engagement by incorporating insights/intelligence into the engagement channels
- Discover new “moments of need/decision” through the transformation journey and enhance engagement with these new moments

Social Program Engagement Roadmap for HHS Agencies

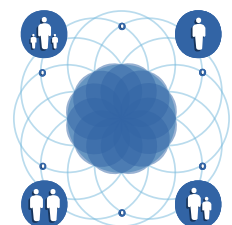
HHS agencies looking to leverage digital technologies and channels to transform the way citizens and agency workers/providers interact with each other can leverage the Social Program Engagement model to meet their needs. SPE systems can be introduced at any time, irrespective of whether existing SORs are based on legacy or modern technologies. An effective SPE system roadmap would start with focus on citizen and worker experiences, in their key moments of need, when interaction and collaboration are needed. These engagement experiences will leverage existing legacy investments while transforming the way citizens, workers and other players in the service delivery ecosystem interact with each other.

By utilizing engagement analytics and feedback from citizens, workers and providers, a phased business process reengineering of the backend processes/SORs will help align agency IT systems with expectations of the 21st century users. Over time, citizen and worker engagement channels can add new “layers” of engagement that can work off multiple backend SORs (doc management, case management, authentication, file management etc.) and enable phased modernisation of those systems without impacting the “customer experience”.

As the engagement experiences and SOEs mature, systems of understanding can be introduced. These SOUs utilise data from the existing SORs to build a layer of intelligence/understanding that provides contextual and “moment of decision” data points for citizens, workers and other players in the process. Using data from SORs, SOEs and SOUs, transactional and usage analytics can be built for agency decision makers to measure progress towards outcomes and make program changes to improve outcomes/effectiveness.



System of Record



System of Engagement

SPE Systems of Record Host Processes and Data

- Safely store and master case, client and program data
- Ensure compliance with complex legal federal laws
- Manage complex eligibility and entitlement rules for social programs
- Orchestrate complex enterprise workflows across teams and agencies
- Persist and archive supporting documentation
- Leverage complex software packages, experience long development and deployment cycles

SPE Systems of Engagement Serve Workers and Clients in the Moment

- Sit beside multiple systems of record to deliver personalized context
- Data and user interface tailored to moments of need
- Enabled by the capability of smart devices such as smart phones and tables
- Leverage social and cloud and AI technologies
- Lightweight, modern technologies for short, iterative release cycles

The Conclusion

The advent of mobile, cloud, analytics and artificial intelligence over the last decade has caused a fundamentally disruptive change in user expectations. A new generation of users that Moore refers to as “digital natives” expect their workplace IT systems to offer similar context and experience as their personal, social and mobile systems. This is forcing enterprise IT leaders to think about how they transform their systems to better engage with their stakeholders.

Social Program Engagement systems are fundamentally focused on communication, collaboration, context and user experience and are typically built as a layer to extend existing Systems of Record.

Leveraging existing investments in Systems of Record and developing new ways of interacting with these traditional systems through Systems of Engagement and systems of intelligence offer the Holy Grail for government and industry to better serve their new generation of digital natives.

Mobile devices integrated into a system of engagement can transform the cost, user experience, and results of these moments of engagement. By applying context such as the location and personal preferences of the users to the task at hand, the engagement is better suited to the needs of the moment.

In some respects, mobile devices and apps are the visible layer of social program engagement systems. They are the front end to all the complex transactional systems that provide the information and workflow required to service the user need at that moment

Embracing the social program engagement model poses new challenges for Health & Human Services agencies, but the potential returns are enormous. By beginning to embrace this holistic, client and worker experience focused model now, Health

& Human Services agencies can pre-position themselves to launch the initiatives that will make their employees and service providers more productive and their clients better informed and better served.

Notes and References

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About Diona

Diona provides innovative systems of engagement solutions to government Health and Human Services, Social Care, and Social Security agencies and NGOs around the world. Diona's family of social program engagement solutions, turn mobile devices—such as smartphones and tablets—into tools to achieve better business and social outcomes by helping agencies serve people more effectively, while improving how their employees work and collaborate. Diona solutions extend organizational systems of record and deliver real-time data directly into the field for clients and workers. Diona solutions are secure, robust, scalable, and reliable and feature flexible cloud-based or on-premise deployment options. With deep domain expertise and a user-centered design philosophy, Diona delivers digital solutions that help government agencies and NGOs solve real-world problems for their clients and employees.

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