

To: Warden and Members of County Council

From: Director of Human Services

Municipal Modernization Program Funding-Intake 3 Subsidized Housing Optimization Review

RECOMMENDATIONS

- 1. That County Council receive the County of Oxford Subsidized Housing Operations Optimization Review report prepared by KPMG, dated December 2, 2022;**
- 2. And further, that County Council direct staff to explore the recommendations made in the Report to increase efficiency and effectiveness in the delivery of subsidized housing services throughout the County;**
- 3. And further, that County Council direct the Director of Human Services to bring a report back to County Council in December 2023 to provide an update on recommendations made in the KPMG report.**

REPORT HIGHLIGHTS

- This report is intended to provide County Council with an overview of areas for potential improvements in service delivery of subsidized housing throughout the County.
- The Municipal Modernization Program Intake 3 requires approved projects to be completed by January 31, 2023.
- The report will be posted to Oxford County's website once endorsed by County Council as a requirement of the Municipal Modernization Program Transfer Payment Agreement.
- Recommendations support automating processes to reduce risks of errors caused by manual processes and improve service delivery for staff and clients.

Implementation Points

The information in the report will be used to inform Human Services on changes in business workflows, processes and policies in order to increase efficiencies in service delivery of subsidized housing some of which may result in cost savings once fully implemented.

Recommendations made in the report will need to be phased in over several years to allow for planned implementation of software solutions and workflows to transfer from manual processes

to automated processes. In addition, multiple departments would be impacted as they are involved in many of the workflows pertaining to subsidized housing and a coordinated implementation is required.

Financial Impact

The Subsidized Housing Optimization Review project was approved by Council under Report No. **CS 2021-38** in the amount of \$35,000 and received 100% funding under the Municipal Modernization Program.

The report includes recommendations for considering the implementation of a property management system and a wait list system for the subsidized housing portfolio which would have financial implications. The 2023 budget includes funds for the implementation of a wait list software but does not include funds for the implementation of a property management system. Other recommendations would represent no financial impact to the 2023 budget as they would be focussed on policy, processes and workflows.

Should staff determine that a property management system be implemented in 2023 staff will bring forward a report seeking Council approval to move forward, subject to funding availability.







Communications

Once the report is endorsed by County Council the Report will be placed on the County’s website as required by Municipal Modernization Program funding.

KPMG consulted with Human Services staff who work in the subsidized housing portfolio as well as Facilities and Corporate Services staff to provide input on workflows, processes, policy and procedure. The information gathered during the consultations informed the recommendations in the Report from KPMG.

The draft final report was circulated to the project committee to provide feedback to KPMG before the report was finalized. The final Report will be circulated to Human Services, Facilities, Corporate Services and Senior Management Team for information.

Strategic Plan (2020-2022)

					
<i>WORKS WELL TOGETHER</i>	<i>WELL CONNECTED</i>	<i>SHAPES THE FUTURE</i>	<i>INFORMS & ENGAGES</i>	<i>PERFORMS & DELIVERS</i>	<i>POSITIVE IMPACT</i>
				5.ii.	

DISCUSSION

Background

At the October 13, 2021 County Council meeting report [CS 2021-38](#) was approved directing staff to apply for Municipal Modernization Program Intake 3 funding for various review and implementation projects. The Subsidized Housing Optimization Review was one of eight projects submitted under Intake 3.

Upon confirmation of funding approval, a project committee was formed and a Request for Proposals (RFP) was issued in May 2022. There were two respondents to the RFP and KPMG was awarded the project. KPMG started their optimization review in August 2022 and provided a final report to the project committee in December 2022.

The Municipal Modernization Program Intake 3 requires the projects to be completed by January 31, 2023.

The following areas were the focus of the Optimization Review:

Reporting

- Due to multiple software applications currently being used, there is no centralized source of data which creates inefficiencies in extracting key data such as current waitlist wait time, placement timelines, data required for the Service Manager Annual Information Return, or being able to track a client's journey from their application submission until they transition from housing.
- Since Great Plains was not designed to manage housing, there is no report that can produce a rent receipt for a client. Right now this is a manual process of data dumps that is organized in an excel workbook then uploaded for a mail merge to produce a letter to the client.
- Ability to have an easy to read statement of account that can be used in the event of discrepancies or filing with the Landlord Tenant Board.

Ease of Use

- Ability to have multiple bank accounts set up for pre-authorized payments. If there are two or more tenants paying separately, only one tenant is able to have pre-authorized withdrawal of their monthly rent.
- Capability for batch processing of rent payments.
- Potential to have a dashboard or landing page that will display key information to the staff member that does not require navigating multiple areas to have an overview of a client's file.

Audit Trail

- Audit functionality is required to ensure accuracy and compliance. Right now, there is a notes section where staff can enter a note, but it is not date or time stamped nor does it

show the username. These notes are also able to be deleted or modified after they have been entered.

- Audit tracking of changes would be beneficial when changes have been made to a client's file others need know when and who made the change and for what reason. Right now staff rely on notes being entered which can be prone to being omitted.

Integration

- In order to have a seamless transition from beginning to end, it is key to have automated integration between the different areas of the client's journey. This will also ensure the history / background follows the client so staff always have everything related to that client in one spot.

Digitalization

- Reduction in the amount of paper that is required to transfer between clients and the County with online workflows and secure digital documentation.

The goals indicated in the proposal for a successful review included specific and actionable recommendations that:

- Document current state and ideal state of the subsidized housing processes
- Identify best practices to achieve greater effectiveness and efficiencies
- Gap analysis
- Identify cost savings
- Provide a recommendation(s) for improvements
- Identify cost savings as a result of implementing the improvement recommendations

Comments

KPMG's report summarizes the review into three Key Themes:

1. need to explore the current system's ability to provide the level of service for the Division;
2. need to refresh and/or develop policies to assist in service delivery; and,
3. reliance on manual processes.

The implementation of software applications to automate processes for property management and the waitlist would improve efficiencies in workflows for staff and clients. As outlined in the report the current processes limit capabilities and require manual work processes to extract information.

The 2023 budget includes funds for the implementation of a waitlist software that will automate the processes for applying for affordable housing; allow applicants to update their information through their own login; and, for staff to be able to conduct annual updates to better manage the waitlist. The implementation of a property management system was not included in the 2023 budget request. Further conversations with other departments such as Finance and Facilities is required before a decision can be made for next steps.

Facilities will be rolling out Cartegraph in 2023 which is a software application that manages the maintenance of Oxford County's assets that includes the subsidized housing buildings covered in the KPMG review. Most property management systems will have their own work order module and a discussion on how this will be managed and integrate with the property management software will need to happen. This may only require a change(s) in workflows or policies with the roll out of Cartegraph.

Finance uses Great Plains for all financial transactions and a conversation will need to take place to work out how financial transactions such as rent payments will be tracked and exported for reporting purposes. A property management system will reduce the reliance on manual processes currently being used to perform certain business functions.

Staff will be exploring recommendations outlined in the KPMG Report to implement operational changes that automate processes, eliminate non-value add functions, and improve service delivery. Many of the changes recommended are operational in nature and do not represent a financial burden to the County. Staff will apply for any funding that may come available in the future to offset implementation costs, subject to eligibility.

Conclusions

Investment in modernization and digitization across the subsidized housing portfolio will improve workflows, reduce manual processes that increase the potential risk for error, and address limitations that exist with the current system. The end result will be improved service delivery for clients and staff, improved job satisfaction, and improved efficiency of integrated service delivery across the Human Services portfolio.

SIGNATURES

Departmental Approval:

Original signed by

Kelly Black
Director of Human Services

Approved for submission:

Original signed by

Ben Addley
Interim Chief Administrative Officer

ATTACHMENTS

Attachment 1 - County of Oxford Subsidized Housing Operations Optimization Review Report, prepared by KPMG, dated December 2, 2022

Attachment 2 – KPMG Presentation - County of Oxford Subsidized Housing Operations Optimization Review Report