



**CITY OF HAMILTON**  
**HEALTHY AND SAFE COMMUNITIES DEPARTMENT**  
**Ontario Works Division**

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| <b>TO:</b>                                    | Chair and Members<br>Emergency and Community Services Committee                             |
| <b>COMMITTEE DATE:</b>                        | September 9, 2021   |
| <b>SUBJECT/REPORT NO:</b>                     | Replacement for the Ontario Works Scheduler (HSC21022)<br>(City Wide)                       |
| <b>WARD(S) AFFECTED:</b>                      | City Wide   |
| <b>PREPARED BY:</b>                           | Carole Zoghaib (905) 546-2424 Ext. 7000<br>Terry Quinn (905) 546-2424 Ext. 3080             |
| <b>SUBMITTED BY:</b><br><br><b>SIGNATURE:</b> | Bonnie Elder<br>Director, Ontario Works Division<br>Healthy and Safe Communities Department |

**RECOMMENDATION(S)**

- (a) That the single source procurement, pursuant to Procurement Policy #11 – Non-competitive Procurements, with Clark Marketing Communications for the replacement of the Ontario Works Scheduler, be approved and funded as follows:
  - (i) That the estimated one-time cost of \$21,000 be funded from Tax Stabilization Reserve (110046) generated from the Ontario Works forecasted 2021 Net Levy savings;
  - (ii) That the Ontario Works Scheduler maintenance cost estimate of \$38,600 annually, (\$19,300 Net Levy, \$19,300 Provincial funding), be approved by Council and added to the Ontario works 2022 base budget; and,
- (b) That the General Manager, Healthy and Safe Communities Department be authorized to negotiate, enter into and execute a Contract and any ancillary documents required to give effect thereto with Clark Marketing Communications, in a form satisfactory to the City Solicitor.

## **EXECUTIVE SUMMARY**

City of Hamilton Ontario Works Division (OW) and Information Technology Division (IT) staff have identified that the current client scheduling system is at the end of life, cannot be updated to meet the changing OW business processes and funding targets mandated by the Province, and is not sustainable.

A review of scheduler systems used by other municipalities has identified the majority are using local solutions while the remaining municipalities, including Hamilton, are seeking a new solution to their current scheduler. Research had identified an OW scheduling system developed for Waterloo Region's Community Services Department (Waterloo) that will meet Hamilton's business needs. This system was developed by Clark Marketing Communications (Clark) after Waterloo conducted a competitive RFI process. This system is also used by Niagara Region's Social Assistance and Employment Opportunities Division (Niagara). Two other municipalities in Ontario are also considering use of this scheduler system.

OW staff consulted with Procurement staff and were advised that a Policy #11 Non-Competitive Procurement was required to engage in discussions with Clark to get cost estimates for implementation of the scheduling system used by Waterloo and Niagara. After engaging in preliminary discussions with Clark, OW staff are confident that this vendor is familiar with the needs of an OW Administrator and their scheduling system can meet our current business needs. Further, OW staff in Hamilton, Waterloo and Niagara are confident that Clark can build ongoing enhancements that will be required to meet changing OW business mandates and funding targets imposed by the Province.

If the Recommendations in this Report are approved, the scheduling system would be implemented by April 2022, which aligns with the start of the next Provincial funding period for Ontario Works.

## **Alternatives for Consideration – See Page 4**

## **FINANCIAL – STAFFING – LEGAL IMPLICATIONS**

Financial: The one-time implementation cost for the OW scheduler is estimated to be \$21,000. Work would begin in 2021 but continue into 2022. Any costs incurred in 2021 will be funded by OW Division in year savings. Cost incurred in 2021 will be offset by 50% Provincial funding. Remaining costs that will be paid in 2022 will be funded as noted in Recommendation (a) (i). The anticipated OW surplus in 2021 is expected to cover the draw on the reserve.

In addition to the one-time project costs, there will be ongoing maintenance and support estimated at \$38,600 annually that will be cost shared with the Province at 50%. The ongoing maintenance costs will be added to the OW base budget in 2022. The maintenance agreement is on a 5-year term, total cost of \$193,000 over the 5 years, cost shared with the Province.

Staffing: N/A

Legal: N/A

## **HISTORICAL BACKGROUND**

The current OW scheduling system was built in-house by another municipality and adopted by Hamilton over twenty years ago. Changes to OW operating systems, business processes and upcoming changes to the focus of OW case management have rendered it obsolete.

On February 11, 2021, MCCSS outlined a renewed long-term vision for social assistance transformation in Ontario. An overview of the vision and timeline was provided to Council earlier this year in Report HSC21014.

## **POLICY IMPLICATIONS AND LEGISLATED REQUIREMENTS**

By-law 20-205, City Procurement Policy, Policy #11 Non-Competitive Procurement.

## **RELEVANT CONSULTATION**

City Information Technology Division: City IT staff have confirmed the high-level requirements to operate the Clark scheduler that is currently in use in Waterloo and Niagara and recommend proceeding with Clark. IT will participate with Legal to review and negotiate a “Software as a Service” contract with the vendor and with Clerks to support the privacy assessment if Report HSC21002 is approved. Additionally, no other scheduler currently in City use meets the changing needs of the OW program.

City Clerk Division: The City Clerk will review data privacy methods with vendor’s input prior to completion of any contract.

Procurement Section: Procurement staff was consulted regarding the City’s Procurement Policy. OW was advised to complete a Policy #11 form and receive the approval of the General Manager of Healthy and Safe Communities Department prior to engaging the vendor for sole purpose of informing any resulting report to Council.

Finance and Administration Section: Finance and Administration were consulted regarding the net levy impact.

## **ANALYSIS AND RATIONALE FOR RECOMMENDATION**

The current OW scheduler does not provide the needed functionality to meet the needs of Hamilton's local OW operations. A summary of shortcomings of the current tool includes:

- Inability to add/delete or categorize types of client sessions being scheduled. Lack of metrics to balance staff workload and assess overall capacity for client visits;
- No automated appointment reminders to clients by text, email or letters
- Lack of reporting capability on Provincial metrics that impact funding.

The programming language used to develop the current scheduling system is not supported by core City IT staff. Changes to the system that have been requested require the use of external contract staff and have been difficult to realize. The backlog of outstanding change requests and additional changes now required cannot be completed in a timely or financially responsible manner.

Key elements of the renewed long-term vision for social assistance transformation in Ontario include maintaining person-centred services within municipalities to better support life stabilization and improved outcomes, and a shift of administrative services that could benefit from further automation to the Province. These changes to business processes will be accompanied by new performance targets that will impact Hamilton's Ontario Works funding. The current scheduler does not provide the required information to support appropriate oversight and management of local processes and cannot be updated to meet the needs. Additionally, no other city scheduler is available that would meet these business needs.

The proposed Waterloo/Niagara scheduler would address the shortcomings of the current system. Further, it is supported by an external software company who will maintain the system. Any costs to make future updates that may be needed, due to changes in the provincial Ontario Works program, will be shared by the municipalities using the system.

## **ALTERNATIVES FOR CONSIDERATION**

Hamilton could choose to pursue a scheduler system with another vendor selected through the City's Request for Proposal (RFP) process. The risks of pursuing this alternative include:

- Significant time required for a new vendor to develop the functionality already available in the system used by Waterloo and Niagara;

- Significant time required for a new vendor to gain understanding of the needs of an Ontario Works administrator;
- Staff time and effort to explain the test similar functionality to what is currently working well for Waterloo and Niagara;
- The cost to develop a new custom system would likely be higher than purchasing the existing Waterloo/Niagara system; and,
- Reduced chance of other municipalities choosing to use the same technology, thereby reducing potential for shared future cost or enhancement benefits.

In addition, if there is a delay through the City's Request for Proposal (RFP) process and a successful vendor is selected in 2022, then it is unknown if Ontario Works will have in-year savings to offset the cost.

Clark Marketing Communications has demonstrated the required functionality and successfully provide these services to Waterloo and Niagara. For these reasons, the alternative of not directly entering a contract with Clark that leverages the Waterloo/Niagara scheduler is not recommended by staff.

## **ALIGNMENT TO THE 2016 – 2025 STRATEGIC PLAN**

### **Healthy and Safe Communities**

Hamilton is a safe and supportive City where people are active, healthy, and have a high quality of life.

### **Our People and Performance**

Hamiltonians have a high level of trust and confidence in their City government.

## **APPENDICES AND SCHEDULES ATTACHED**

None