



City of
Peterborough

To: Members of the General Committee

From: Sheldon Laidman, Commissioner of Community Services

Meeting Date: June 8, 2020

Subject: Report CSSS20-007
Award of Non-Standard Procurement For Ontario Works Client
File Digitization Project

Purpose

A report to recommend award of a non-standard procurement process to digitize Ontario Works Client files.

Recommendation

That Council approve the recommendation outlined in Report CSSS20-007, dated June 8, 2020, of the Commissioner of Community Services, as follows:

That the non-standard procurement for the digitization of Ontario Works Client Files be awarded to Nimble Information Strategies, 2820 14th Avenue, Suite 100 Markham, ON L3R 0S9, at a cost of \$107,000 plus HST of \$13,910 for a total of \$120,910.

Budget and Financial Implications

The estimated onetime start up cost (net of the HST rebate) is \$108,883 and can be accommodated within the 2020 Social Services budget. Following the initial start up the estimated ongoing monthly cost is \$1,600. Ongoing costs will not increase annual budget requirements as it is anticipated this process will reduce the cost of paper, printing, filing, and staff time. All Ontario Works costs are cost shared 50/50 between the Province and the Consolidated Municipal Service Manager (CMSM) so the impact to

the City's budget for the initial start up cost and on going monthly costs will only be 50% of these costs.

Background

For the past number of years, the Ministry of Children, Community and Social Services (MCCSS) has been working toward the modernization of service delivery of Social Assistance in Ontario. The Electronic Document Management Project is one component of this overall provincial strategy and aims to digitize all Ontario Works (OW) client files. The City typically has approximately 3500 ongoing client files to manage along with thousands more closed files that are often needing to be reimplemented as clients cycle back onto Ontario Works assistance.

One of the process-focused recommendations from the recent KPMG review was to "undertake digitization of social services records." It was recognized by KPMG that significant savings and efficiencies can occur through first the digitization of files and then subsequent changes to work processes to better utilize these digital files.

Social Services staff consulted with the City Clerk's office, the Finance Division the Purchasing Administrator and Peterborough Technology Services to discuss corporate plans for electronic file management and to ensure sole sourcing is appropriate in this circumstance.

The recommendation to proceed with a non-competitive bid process was reviewed and approved by the Treasurer.

Recommended Supplier

MCCSS completed a competitive procurement process in 2015 for Document Scanning and Imaging Services. This competitive bid process allowed the Province to digitize two programs directly delivered by MCCSS; the Disability Adjudication Unit (DAU) and the Ontario Disability Support Program (ODSP). They awarded the contract to SpaceSaversCCS Inc. now known as Nimble Information Strategies. MCCSS extended the Master Agreement until December 31, 2023.

As municipalities begin to digitize OW client files, they have the option to use the existing MCCSS/Nimble Master Agreement as the basis for their own procurement process. The City of Toronto Employment and Social Services (TESS) was the first OW

office to begin the client file digitization process in 2019. They used a single source procurement for Document Scanning and Imaging Service with Nimble.

The benefits of using the MCCSS vendor of record, Nimble, are as follows:

- expertise in document imaging and indexing and familiarity with metadata elements specific to OW and ODSP scanning guidelines
- robust corporate security and privacy standards to ensure secure transfers of highly confidential client files, including the procedures to properly destroy hard copy files once digitized
- the corporate infrastructure necessary to scan, index and export digital documents into the Ministry OPS Docs storage. There is already a process in place to manage an “exceptions portal” to resolve documents that are not able to be digitized
- Consistency with other OW and ODSP offices so that client files can be easily shared when clients move or switch between programs

Since the Province has its own approved platform with a very prescribed solution and is the ultimate owner of OW client files, the recommendation is to proceed with their solution and timeline. Consistency with the Province and other OW offices with this vendor will ensure that clients files can be shared easily between other service manager offices and that the City can benefit from any improvements to the overall process being used by Nimble across the Province.

Council Approval Required

Chart 2, Section a) iv) of Appendix A of the Procurement By-law 18-084 indicates Council must approve a non-standard or limited competition procurement when the value is at or above \$100,000.

Next Steps

Upon approval by Council, staff would negotiate a Master Service Agreement and Statement of Work, finalize the initial startup costs and negotiate monthly fees for ongoing file conversion, and establish a timeline for implementation.

Summary

Significant savings and efficiencies can occur through first the digitization of files and then subsequent changes to work processes to better utilize these digital files in the provision of services to OW clients.

Submitted by,

Sheldon Laidman
Commissioner of Community Services

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