



County Council

Meeting Date: November 9th, 2021

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SUBJECT: Social Services – Electronic Document Management

BACKGROUND:

The Electronic Document Management (EDM) model has been developed as part of the Ministry's Social Assistance Reform mandate. EDM provides the foundational base for enhanced user experience by allowing caseworkers more time to spend on life stabilization activities and process optimization through the digitization of paper into digital records accessible through the Social Assistance Management System (SAMS).

All Ontario Disability Support Program (ODSP) sites were equipped with Electronic Document Management tools. As of June 2021, 25 municipal Ontario Works (OW) sites have moved to full EDM. After discussions with the Middlesex County Information Technologies department, it was determined the best course of action is to have all current and future files digitized. The County has commenced the implementation of many EDM processes and practices (e.g. reviewing and purging files to remove any unnecessary documents).

A representative of the Province of Ontario has confirmed that the Province participated in a lengthy procurement process for digitization services with the specific intent of engaging in a co-operative purchasing initiative to save those delivering OW/ODSP and moving to EDM time and resources. The Province's process ended with a company named Nimble Information Strategies Inc.

ANALYSIS:

The County is the delivery agent for OW services in Middlesex County and section 12 of the County's Procurement Policy allows for co-operative purchasing initiatives. Section 12(1) specifically provides:

“The Council may authorize participation with other municipalities, municipal agencies or public authorities in co-operative purchase ventures when the best interest of the County of Middlesex will be served.”

The co-authors of this report consider the digitization of files by a service provider that has a deep understanding of SAMS to serve the best interests of the County. EDM will reduce the amount of time spent on document management functions, will create opportunities for enhanced service delivery, will free up time for active case management functions, and will enable staff to make faster decisions so that Social Assistance recipients can receive the supports and services they need when they need them. Making use of the co-operative purchasing initiative of the Province would allow the County's OW delivery to immediately meet the full EDM mandate of the Province and match the services provided by the delivery agent in the City of London portion of the same regional Middlesex-London Service Area. The Province has ensured that Nimble has a deep understanding of SAMS. Nimble's digitization services are used by many different OW and ODSP offices throughout Ontario. The City of London in similar fashion to our recommendation, has similarly made use of the co-operative purchasing portion of its purchasing policy to enable the commencement of Nimble's services to further the implementation of EDM. Should Council have any co-operative purchase questions, as always, it may motion to enter into closed to discuss with the County Barrister & Solicitor. It is possible for the County to deliver digitized services of all incoming OW files immediately if the County enters into a service agreement with Nimble forthwith.

A service agreement with Nimble would:

Strengthen Program Integrity

- Incorporate automation of program rules for document
- Document auditability and performance management
- Consolidation/Streamlining of document channels

Enhance Program Access and Usability

- Expanded service access and increase service channels
- Electronic access to Social Assistance recipient documents
- Improved Social Assistance recipient experience and outcomes

FINANCIAL IMPLICATIONS:

Cost: The ongoing costs for the Electronic Document Management system would be eligible as an Ontario Works administration cost, 50 per cent of which would be cost shared with the Province. The initial start up costs will be approximately \$33,000, while

the ongoing approximate costs are \$16,000. The costs will cover the digitization of files, digital storage of data and two on-site scanners.

Term: The contract will be for a period of one (1) year from the effective date of the Agreement for the digitization of the client master files, and a period of three (3) years from the effective date of the Agreement for the Digital Mail Room. An option to renew the contract for an additional four (4) separate one (1) year periods at sole discretion of the County of Middlesex. The Digital Day 1 SaaS offering is a three (3) year agreement from the effective date of the agreement.

Project Start Date: November 10, 2021.

Project End Date: November 10, 2024.

ALIGNMENT WITH STRATEGIC FOCUS:

This report aligns with the following Strategic Focus, Goals, or Objectives:

Strategic Focus	Goals	Objectives
Cultivating Community Vitality	Advance a diverse, healthy, and engaged community across Middlesex County	<ul style="list-style-type: none">• Promote and support community wellness• Innovate social and community services• Attract, retain, and engage youth in our community• Champion and encourage active transportation and public transit opportunities
Connecting Through Infrastructure	Ensure communities are built on a sustainable foundation that is connected and thriving	<ul style="list-style-type: none">• Encourage and advocate, through partnerships, the construction of scalable, equitable broadband infrastructure, recognizing our unserved and underserved areas• Commit to a sound asset management strategy to maintain and fund critical infrastructure• Use County infrastructure in an innovative way to provide a seamless service experience for residents

Strategic Focus	Goals	Objectives
Promoting Service Excellence	Innovate and transform municipal service delivery	<ul style="list-style-type: none"> • Anticipate and align municipal service delivery to emerging needs and expectations • Engage, educate and inform residents, businesses, and visitors of county services and community activities • Strengthen our advocacy and lobbying efforts with other government bodies • Collaborate with strategic partners to leverage available resources and opportunities • Build organizational capacity and capabilities

RECOMMENDATION:

That the Warden and County Clerk be authorized to enter into a service agreement with Nimble Information Strategies Inc. on terms satisfactory to the General Manager, Finance and Community Services and in a form acceptable to the County Barrister & Solicitor.