

One Window to Affordable Housing

Consolidated Scoping and
Planning Report
May, 2017

Report Disclaimer

KPMG LLP (KPMG) has been engaged by The City of Calgary (the Client) to conduct a scoping and planning review for a 'single point of entry' solution for the Non-Market Housing process. KPMG conducted this review pursuant to the terms of our engagement agreement with The City of Calgary dated November 23, 2016. KPMG neither warrants nor represents that the information contained in this Report is accurate, complete, sufficient or appropriate for use by any person or entity other than the Client or for any purpose other than set out in the Engagement Agreement. This Report may not be relied upon by any person or entity other than the Client, and KPMG hereby expressly disclaims any and all responsibility or liability to any person or entity other than the Client in connection with their use of this Report.

KPMG's role was to perform a current statement assessment and provide findings and recommendations on the approach to implement a 'single point of entry' solution to non-market housing (refer to Page 6 for detail on KPMG's role). The findings and recommendations contained in this scoping and planning report, by their nature, largely relate to opportunities for change or enhancement. They do not fully capture the many strong features of The City of Calgary's current activities and undertakings, nor those of housing provider organizations. Our assessment approach consisted solely of inquiry, observation, comparison and analysis of City-provided information together with information provided by certain service delivery entities. KPMG relied on the completeness and accuracy of the information provided. Refer to Page 7 for an overview of the assessment approach undertaken.

Through normal business processes, The City of Calgary will be responsible for the:

- Assessment of observations and findings
- Decision to implement any recommendations, and
- Consideration of impacts that may result from the implementation of recommendations.

Estimates contained in this document are based on specific assumptions, future events and City-decisions. Actual results achieved may vary from the information presented and such variation may be material.

This **One Window to Affordable Housing: Consolidated Scoping and Planning Report** contains the following sections: **Executive Summary** (see Page 4-26), **Current State Analysis report** (see Page 27 – 49) , **Options Report** (see Page 50 -84) and the **Recommendations Report** (see Page 85 – 102), which includes the Next Steps.

Key Definitions

Affordable housing : According to Canada Mortgage and Housing Corporation, housing is considered to be affordable when a household spends less than 30% of its pre-tax income on adequate shelter. The City of Calgary defines affordable housing more narrowly as housing for people who, because of financial or other circumstances, need assistance to cover their housing costs. It may take a number of forms on the housing spectrum, from non-market (i.e. below market rates) rental units to attainable homeownership. In order to exclude discretionary overspending, The City targets affordable housing to households earning 65% or less of the Calgary area median income.

Affordable housing need: A household is in need of affordable housing when it earns less than 65% of the Calgary area median income and spends more than 30% of its gross income on shelter costs.

Case Management: A case management software solution, will group together a compendium of information, processes, advanced analytics, business rules and collaboration that relates to a particular interaction with a client. The case file will store a collection of customer communications, forms, process documents, reports and supporting documentation. All this information will be grouped together and be made accessible in a controlled way to all who are involved in the case.

Transitional housing: Shelters or housing with the primary purpose of providing temporary accommodations and essential services for homeless individuals.

Homelessness: Homelessness describes the situation of an individual or family without stable, permanent, appropriate housing, or the immediate prospect, means and ability of acquiring it. Homelessness encompasses a range of physical living situations, including 1) absolutely homeless and living on the streets; 2) staying in overnight shelters; or 3) in accommodation that is temporary or lacks security of tenure.

Non-market rental housing: Rental housing provided for income groups not served by the private market. This housing is typically made affordable through public and/or non-profit ownership of housing units.

Rent supplements: Subsidies that enable households in need of affordable housing to cover the cost of a rental unit in the private market. In Calgary, they are funded by the provincial government and administered by Calgary Housing Company. Rent supplements have multiple structures; for instance, some are paid directly to the landlord while others are paid to the tenant (client).

Definitions as per: <http://www.calgary.ca/CS/OLSH/Documents/Affordable-housing/Corporate-Affordable-Housing-Strategy.pdf> (Accessed January 2017)



One Window to Affordable Housing

Executive Summary

Report Background

This executive summary should be read in conjunction with the detailed report, **One Window to Affordable Housing: Consolidated Scoping and Planning Report**, which provides the detailed background, analysis and recommendations to The City of Calgary.

Context

There is currently no single place in Calgary where individuals and families can go if they want to apply for affordable housing. Clients must maneuver complex processes and individually apply to various housing providers. Each housing provider has their own procedures, application form, and waiting list. Successfully finding housing can involve multiple applications to multiple providers, with little collaboration or transparency, and with a high burden placed upon the person applying. This process can be frustrating and confusing for the individuals impacted and does not effectively serve the community in need, the partner organizations or The City of Calgary (The City).

Affordable housing is a City of Calgary priority as reflected in “Foundations for Home: Calgary’s Corporate Affordable Housing Strategy, 2016 – 2025,” released in 2016. In the strategy, The City commits “to fostering a collaborative system where agencies and organizations work together to seamlessly deliver services, address challenges, and ensure that all residents access the housing and programs that better meet their needs.” The challenges with the application process for affordable housing have also been noted by multiple community initiatives.

In light of the current context, The City of Calgary is leading an initiative to scope out potential solutions that would provide a

coordinated, single window intake process across the many affordable housing providers that would better meet the requirements of those who need housing. This initiative is called the One Window project. This project is being conducted in consultation with an Advisory Group of non-market housing providers, with input and championship from the Community Housing Affordability Collective (CHAC).

Project Goal

Improve the experience for Calgarians needing access to affordable housing so that more people can be both efficiently and successfully housed.

Project Scope

Explore the feasibility of implementing a One Window solution in order to streamline the existing application process for Calgarians in need of affordable housing. This phase of the project is limited to long-term, non-market affordable housing and does not include shelter beds, emergency beds, and transitional housing.

Project Objective

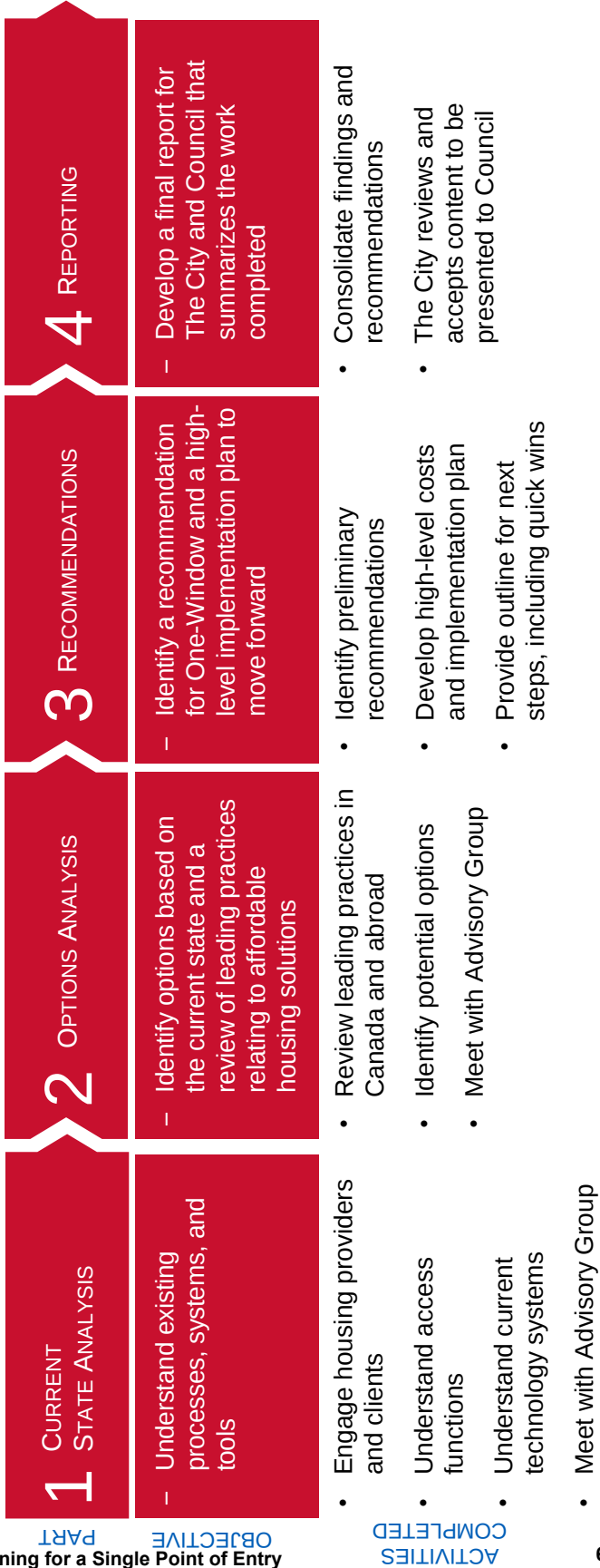
This project is the first phase of a potential transformation program. The objective is to complete a planning and scoping exercise to identify whether a single point of entry can be achieved and, if it can, the options for moving forward with a single point of entry. The long-term objective is to create a single point of entry to the non-market housing system in Calgary.

The next page gives an overview of the work that KPMG performed during the various parts of this Project in support of The City’s objective for this project.

The One Window Scoping and Planning Review

KPMG was engaged to assist The City in completing a scoping and planning review to support a single point of entry into Calgary’s affordable housing system. KPMG conducted a current statement assessment, which included substantial engagement with housing providers and clients; a high-level analysis of the processes for applications to housing providers; a high-level review of existing technology in use by a few housing provider organizations; the development of options for consideration for One Window; and a high-level implementation plan for the next phase of work for the recommended option . Findings in this report support an approach to transform the way in which affordable housing is accessed from a multiple application processes to a single One Window which would improve the assessment, screening and matching of clients to homes.

The work plan below provides an overview of the activities that KPMG was engaged to complete. Each part of the project resulted in an interim deliverable that was consolidated and refined, along with The City’s feedback, into this final report.



The next page discusses the engagement activities completed with housing providers and clients throughout each of the stages as described above.

Engaging with Stakeholders to Affordable Housing

To set the preconditions for success, an Advisory Group of affordable housing providers was created to support the project. The group met regularly to provide feedback on the approach, project timelines, and stakeholder engagement, as well as to review project findings.

Research was conducted on the affordable housing sector as a whole in order to identify client demographics and housing providers. As a result of this research, a sample of key stakeholders from the sector was selected. Engagement with these stakeholders included workshops, interviews and surveys.

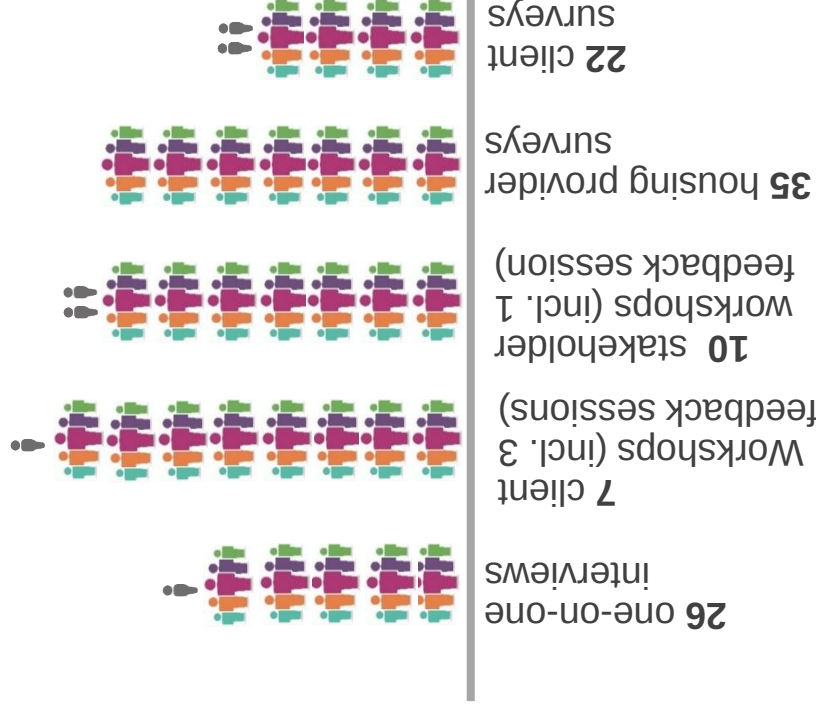
A consultative approach was undertaken which focused on in-person engagement with both clients and housing providers in Calgary. The diagram on the right represents the high-level overview of the number and variety of stakeholders engaged. The objectives of stakeholder engagement included:

- Generating excitement and early buy-in for a One Window solution
- Obtaining perspectives from housing providers and clients alike
- Understanding opportunities and challenges related to existing intake processes, and
- Capturing ideas for a new system from housing providers and clients.

During the project, there was clear and consistent feedback provided. This engagement process has led to a number of key findings for the current state based on the perspective of clients and housing providers.

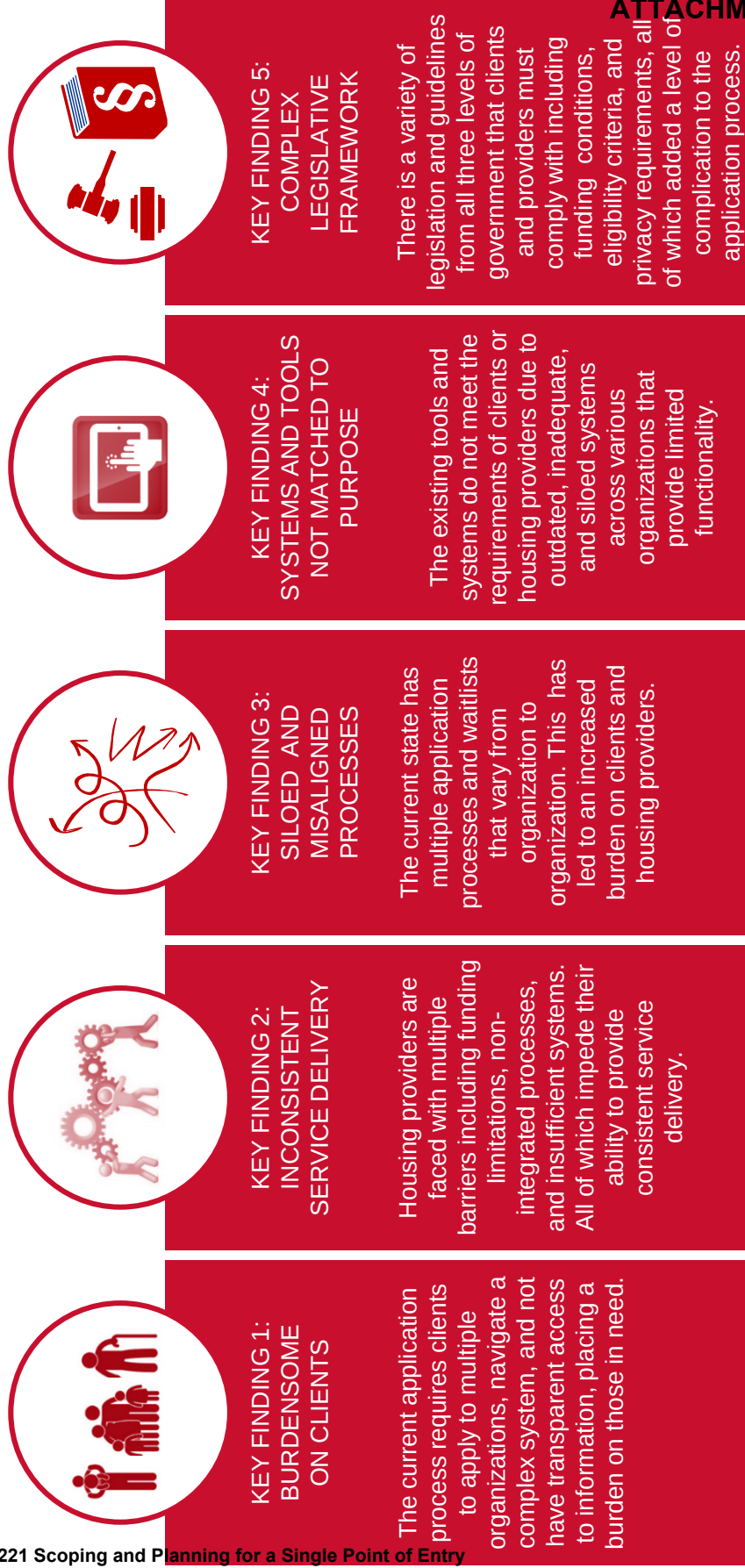
Feedback sessions were conducted for both housing providers and clients respectively. The current state findings and options identified were presented to audiences at these sessions.

The next page details the key findings from the engagement.



Current State Analysis and Key Observations

The key findings represent feedback obtained from clients and housing providers through the various engagement activities described earlier in this report. These findings have been presented to and validated by participating housing providers and The City project team.



As a result of these factors, access to affordable housing in Calgary is not currently client-centric, but a fragmented and complex system that is burdensome for clients to navigate. It often restricts the ability of housing providers to direct clients to the appropriate contact. The next page summarizes considerations for identifying potential solutions for One Window.

Moving to One Window Access for Affordable Housing

The potential of One Window is unlocked when delivery is realigned across common and integrated access functions to enable high-value services in the most efficient and effective manner possible. Engagement with stakeholders has increased awareness about the potential of One Window has created some significant shifts in thinking. These shifts represent the ideal end-state that could be implemented. The table below provides the high-level overview of concepts that should be considered for an ideal state based on feedback obtained from housing providers and clients during the engagement and feedback session. These ideal end-state concepts were used to shape the options identified later in this report.

From....	To...
<i>Complex, cumbersome and inconsistent processes</i>	Client-centric, user friendly and simple processes Access to affordable housing will be simpler and reduce the number of times clients are required to share their story to access affordable housing and other services. As a result, client needs will be better met.
<i>Access is siloed and staff and services are unable to appropriately respond to a client's needs</i>	A common access point exists with appropriately skilled and trained staff and integrated systems and tools to support meeting a client's needs Access to affordable housing is delivered through One Window in an integrated manner. Housing provider staff are appropriately skilled, trained and equipped with the necessary tools to better understand the needs of clients and how best they can be served.
<i>Many paper-based processes are used and technology is not well leveraged</i>	A common IT solution supports housing providers and clients, key processes are automated and simplified Technology will enable the capabilities and requirements of One Window – enabling and enhancing the use of self service for clients as much as possible

The following page provides considerations that should be taken into account for designing a One Window solution based on feedback received from housing providers and clients.

Key Considerations

During the execution of the current state assessment and the associated engagement of clients and providers, a number of considerations for the future options and the needs they must address, have been identified. They are:

- Incorporate client-centric and choice-based approaches for clients where possible
- Provide a centralized system with relevant housing provider information
- Increase automation of manual processes
- Integrate systems and tools
- Maintain privacy needs of clients
- Provide multiple access points
- Increase transparency for waitlists and application status, and
- Improve user-friendliness and simplicity of application processes.

The current state assessment was used to inform the analysis of options, as well as guide the recommendations and high-level implementation plan presented in latter sections of this report.

The next page provides an overview of the options identified as potential solutions for One Window. These options are each intended to address the current state analysis to varying degrees.

Overview of Options

Through client and housing provider engagement, review of leading practices, assessment of Calgary's current state and ongoing research, four key intake steps were identified:

- **Screening:** Clients learn about housing options and fill out a form to acquire suitable housing. Basic eligibility criteria is assessed by housing providers in this step
- **Assessment:** Clients go through a detailed assessment to determine their eligibility for housing and their housing requirements
- **Matching:** Clients are matched to housing that is appropriately suited to their needs, and
- **Support services:** The inclusion of support services, programs, and related case management for clients.

To address the key findings identified regarding access to Calgary's affordable housing, and based on input from engagement sessions with housing providers and clients as well as lessons learnt from leading practices, several options were considered and reviewed with the Advisory Group and with The City's project team. These options were intended to support and streamline the four key steps in accessing affordable housing mentioned above.

The following four options below were identified and validated with the Advisory Group and The City project team:

- **Option 1** | Centralize Client Screening and High-Level Housing Registry
- **Option 2** | Centralize Client Screening and Housing Registration (including unit availability)
- **Option 3** | Centralize Application, Assessment and Placement, and
- **Option 4** | Centralize Housing and Support Services.

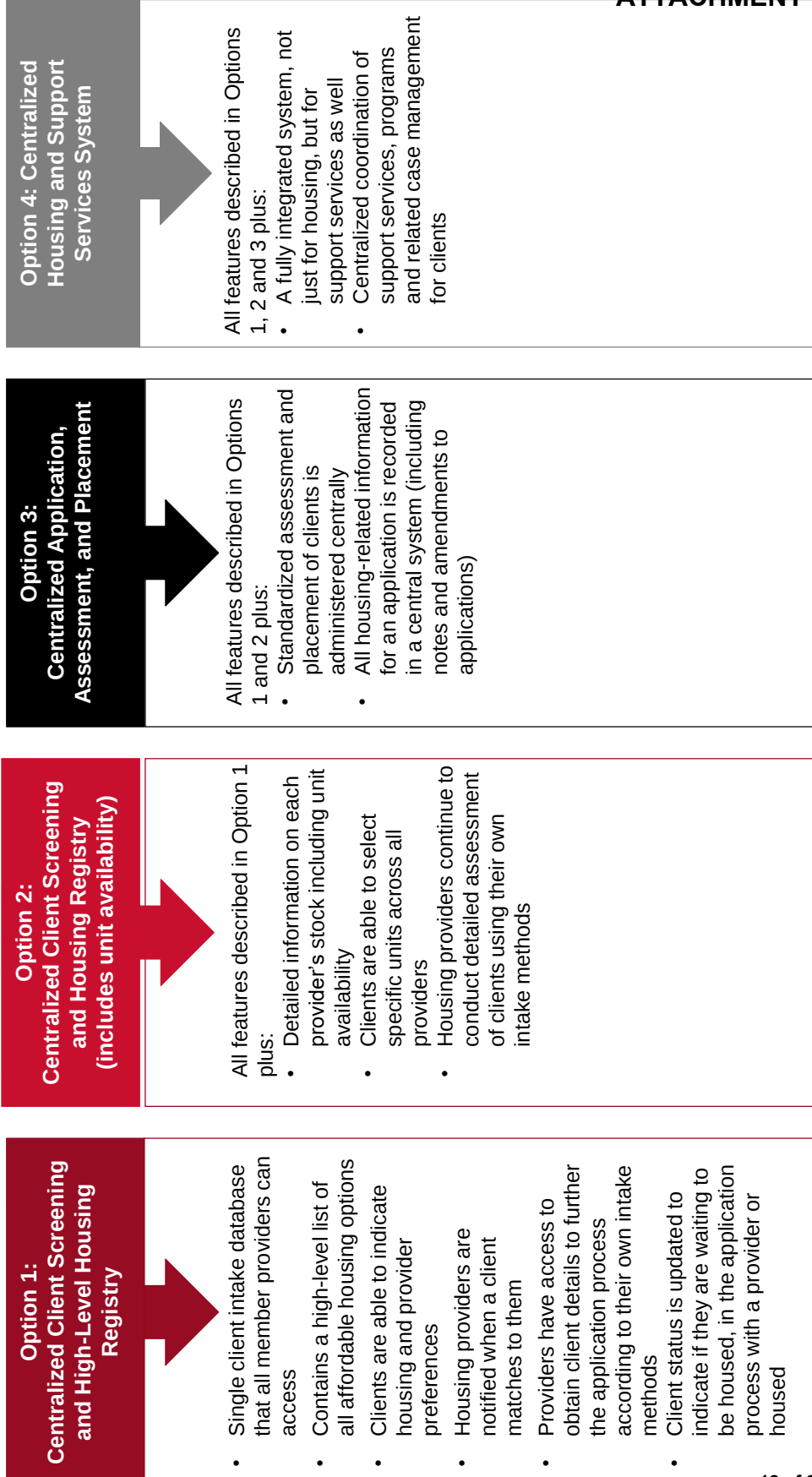
The identified options range in terms of the degree of cumulative change required to current individual housing provider processes, tools and systems. Each successive option involves a progressive and cumulative change to the prior option.

Based on feedback received from housing providers and clients during engagement sessions, the potential solution for One Window should be viewed as **a transformation to a new operating model supported by an IT solution** and not simply the adoption of a common IT system. This new operating model presents a fundamental cultural shift in how the multiple housing providers currently independently provide services to Calgarians to a standardized front facing service to Calgarians in need. It requires significantly more collaboration amongst service providers. Key to the success of this transformation is the participation of current providers.

The following requirements are critical to any of the options' success: **technology considerations, delivery channel considerations; governance, funding, and operational considerations.**

Overview of Options cont'd

The four key options identified for One Window are provided below. The identified options range in terms of the degree of cumulative change required to individual housing provider processes. Each successive option builds on the previous to provide progressive and cumulative potential benefits; however the complexity of implementing each option also increases as does the risk to successful outcomes.



The following page gives an overview of each of these options against the Intake Process for Housing as experienced by clients.

Overview of Key Options and How They Map To the Intake Process

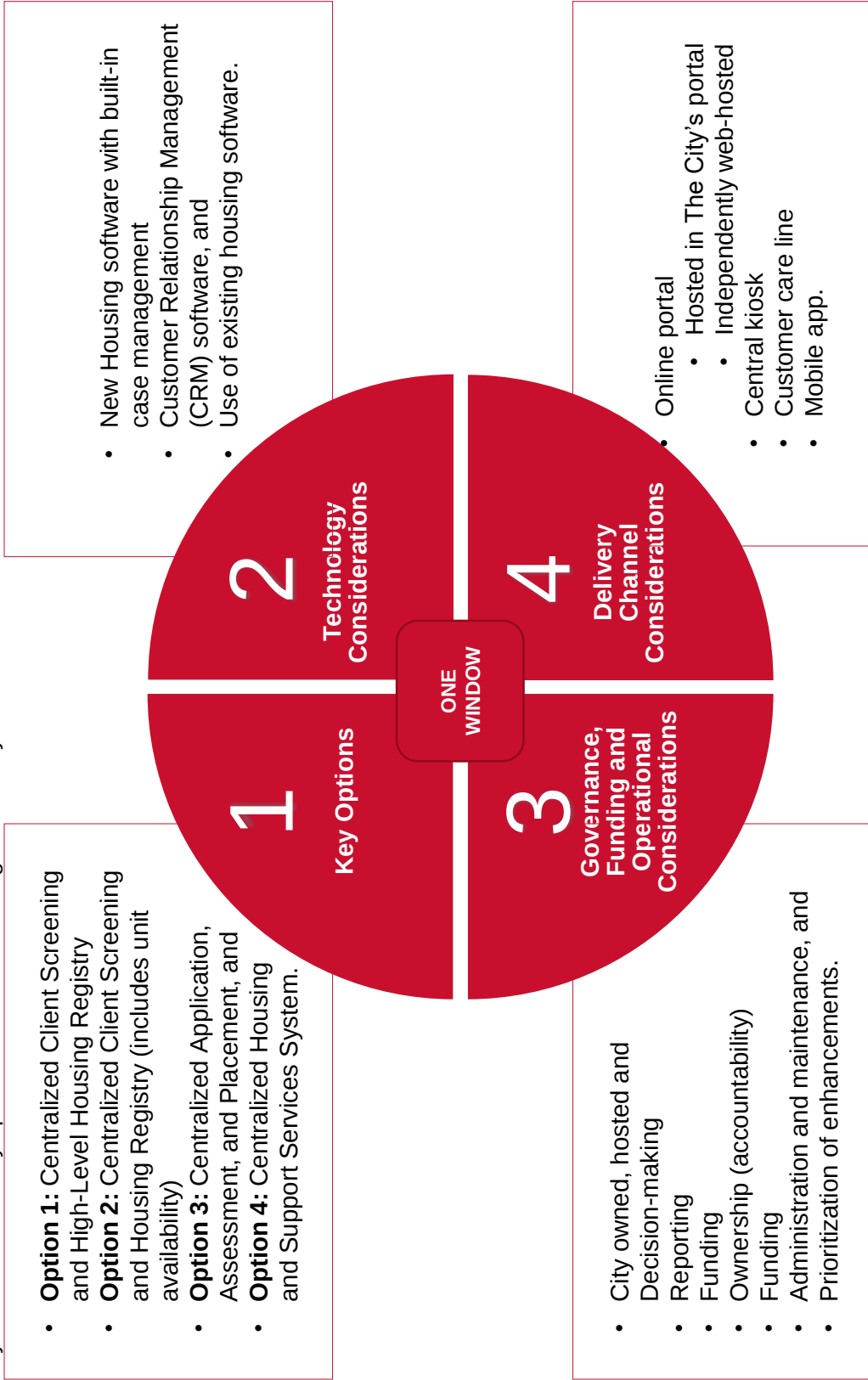
INTAKE STEPS				
OPTIONS	Screening	Assessment	Matching	Support Services
	Clients learn about housing options and fill out a form to acquire suitable housing. Basic eligibility criteria is assessed by housing providers in this step.	Clients go through a detailed assessment to determine: - Their eligibility for housing - Their housing requirements	Clients are matched to housing that is better suited to their needs.	The inclusion of support services, programs, and related case management for clients.
	OPTION 1: Centralized Client Screening and High-Level Housing Registry High-level housing registry Central master client database Application directed to housing providers for further offline processing	✗	✗	✗
	OPTION 2: Centralized Client Screening and Housing Registry (includes unit availability) Choice-based housing selection and transparent waitlist for clients where possible Housing providers' stock matched to waitlists	✗	✓	✗
	OPTION 3: Centralized Application, Assessment, and Placement - Detailed application in One Window - Detailed assessment and placement in One Window - All client housing data stored centrally	✓	✓	✗
OPTION 4: Centralized Housing and Support Services System All case management carried out in One Window Client history stored centrally	✓	✓	✓	✓

Legend

✓ Impacts intake step ✗ Does not impact intake step

Options Analysis: Requirements Matrix

The approach to a potential One Window solution consists of a combination of requirements that need to be selected based on the needs of key stakeholders. Any option selected must integrate the key considerations stated below.



The next page provides a summary of the assessment criteria used to assess each option as a potential solution for One Window.

High-level Assessment Criteria for Options

To support the decision for a recommended option to implement One Window to Calgary's affordable housing intake system, the relative differences in **potential operating benefits**, and **implementation effort and complexity** of the four options were assessed. The potential benefits were assessed from the client and housing provider points of view. The assessment was framed by certain assumptions and estimates discussed with The City, and is supported by evidence, the experience of the KPMG team, and insights gained from research on global leading practices. A technology fit / gap overview was performed for each option to explore possibilities of requirements and software features that should support each option. This was based on interviews with IT representatives from the various housing providers.

To support the assessment of each option, the following criteria were used. These criteria are based on leading practices in human and social service transformation and the development of business cases to provide directional information regarding a set of options. They were agreed upon with The City. A more detailed assessment will be required once the specific business and technical requirements are defined and understood by The City.

The following provides a summary of these criteria:

- **Potential Operating Benefits:** the degree to which each of the options would address the key findings identified by housing providers and clients and lead to improved access to affordable housing, an improved client experience, and improved housing provider efficiency.
- **Implementation Effort and Complexity:** the degree to which each of the options would present significant risks or issues to implement and operationalize. This includes considering the costs of IT, training for staff, change management, process alignment and common governance.

To support the assessment of each option, the following sub-criteria were used:

- **Potential Operating Benefits**
 - Improved access to affordable housing
 - Improved client experience
 - Reduced application processing time for affordable housing, and
 - Improved affordable housing system efficiency.
- **Implementation Effort**
 - System cost
 - Project team effort
 - Training, and
 - Change management.
- **Complexity / Risk to Implement**
 - Processes
 - Stakeholders, and
 - Governance of common delivery decisions and resources.

Each of these criteria are further described on the following page.

Evaluation Criteria for Options Assessed

The table below highlights the potential benefits of each evaluation criteria that may be experienced by clients as well as providers.

Criteria		Description
Potential Operating Benefits	Improved access to affordable housing	Greater ability for clients to access affordable housing through common processes and delivery channels, language / low-literacy mechanisms, and greater awareness of options
	Improved client experience	- Greater ability for clients to tell their story and for information to be better shared across affordable housing providers and stakeholders - Reduction in multiple screening form submissions
	Reduced application processing time for affordable housing	Reduction in time spent between initial contact and referral / receipt of affordable housing (Note: improved wait times are not due to an increase in supply of housing stock)
	Improved affordable housing system efficiency	- Reduction in manual and paper-based processes and overall administrative efforts - Increase in use of integrated systems and tools - Reduction in number of duplicative processes or activities
Implementation Effort	System cost	Relative potential benefit-to-cost ratio of the IT system
	Project team effort	Degree of project team effort required to implement the IT system
	Training	Degree of training required to support use of the new IT system
	Change management	The level of change experienced by clients and housing providers by implementing improvements to processes and systems
Complexity / Risk to Implement	Processes	Degree of process alignment necessary to achieve common processes and the use of the new IT system
	Stakeholders	Degree of stakeholder buy-in to the change(s) brought about by the IT system
	Governance of common delivery decisions & resources	Degree to which governance can be established and operate to identify priorities and achieve consensus on a timely basis for matters affecting implementation of the new IT system

One Window Options Analysis Results

The table below provides a high-level summary of the results of for each option against the assessment criteria previously discussed.

Potential Operating Benefits	Option 1: Centralize Client Screening and High-Level Housing Registry	Option 2: Centralize Client Screening and Housing Registry (include unit availability)	Option 3: Centralize Application, Assessment, and Placement	Option 4: Centralize Housing and Support Services System
	Moderate Operating Benefits Centralized screening could improve access to services and reduce time spent filling out applications. Moderate improvements to efficiency and little to no change in application processing times	Moderate Operating Benefits Centralized screening and housing registry could better match clients to appropriate units, increase waitlist transparency and reduce application processing times. Services could be delivered more efficiently	High Operating Benefits System driven application, assessment and placement could provide better access to a wide range of services, enabling a reduction in application processing times. Streamlining more access functions (as compared to Option 2) could improve delivery efficiency.	Very High Operating Benefits Centralized database and case management will improve client experience by enabling efficient, streamlined and holistic client support. Streamlining case management functions could improve delivery efficiency.
Implementation Effort and Complexity	Moderate Implementation Effort and Complexity Limited system requirements compared to other options could allow for reduced costs, as well as requiring only basic training for staff and minimal change management. Limited process and governance alignment would be required compared to other options. Housing providers would have to resolve how to collect and store data.	Moderate Implementation Effort and Complexity Additional system requirements could increase costs and change management effort, while staff training would be basic. Some housing providers would undergo process changes, depending on their approach. Housing providers would have to resolve common governance issues.	High Implementation Effort and Complexity Intake, matching and assessment functionality could increase costs, and may require additional staff training. Assessment functionality could make process changes and governance more complex, given the diverse legislative and operating requirements of housing providers. Implementation will require professional support.	Very High Implementation Effort and Complexity Case management functionality adds complexity to all aspects of implementation, and will involve a broader range of providers and services outside of affordable housing. Common governance will be challenging to achieve, given the multitude of stakeholders. Implementation will require enhanced professional support.

A summary of the overall assessment of options is provided on the following page.

Summary of Assessment of Options

While all options identified have the overall potential to offer improvement to Calgary's affordable housing system, the options have been assessed in a manner to allow for relative comparison so that an appropriate and achievable solution can be identified for recommendation.

Option 3 and 4 present the greatest potential benefits – this comes from the additional functionality that would be enabled by both options to improve access to Calgary's affordable housing system, make it easier for clients to have their housing (and other) needs addressed and to improve overall efficiency across Calgary affordable housing providers.

Option 3 and 4 are expected to have the highest implementation effort - these will require additional efforts to understand and harmonize existing processes, train staff, and manage changes across more than 60 housing providers in Calgary. By comparison, Option 1 and 2 are expected to comparatively have lower implementation effort.

Option 1 and 2 comparatively have lower implementation complexity / risk – generally, as more functionality is added, the level of complexity / risk to the implementation of the change will increase. Option 4 will have the highest level based on the complexities associated with supporting case management activities, which can be unique to a housing provider and / or the supports and services being provided to clients.

Each of the options represents a positive improvement over the current state. That said, the goal of the One Window project was to determine the most appropriate long-term solution for Calgarians in need of housing that is achievable to implement. KPMG worked with The City to determine the most achievable option based on balancing manageable levels of risk (complexity of implementation, effort of collaboration and cost as examples) with the overall outcomes of improved efficiency and effectiveness of services.

The recommended option is described on the following page.

Recommended Option for a One Window Solution

The purpose of the options analysis was to determine where the greatest potential benefits could be achieved within an acceptable level of effort and complexity for The City and participating housing providers. With each of the options identified, the potential benefits and the associated effort and complexity increases. **Option 3 and Option 4 present the greatest opportunity for potential benefits to improve access to affordable housing for Calgarians, which is the key driver for One Window.**

However, while Option 4 could achieve the greatest potential benefits for One Window, it will present considerable effort and complexity to implement. This is due to the common case management functions that would be designed and delivered. Case management is a diverse and complex function that requires a much broader range of programs and services than what affordable housing providers currently offer. A number of other organizations would need to participate in the process which could add more effort and complexity to the transformation.

In addition, case management is intended to help organize a set of supports designed to achieve a set of desired outcome for clients. For One Window, case management would be designed to better address the root causes that create the need for affordable housing (e.g. poverty, unemployment, etc.) and to provide clients with opportunities to move towards market-based housing. While this will create positive results for clients, it is a much broader focus than the key issue that was identified by housing providers and clients regarding access to affordable housing.

Therefore, while on first review of the Options, it appears that Option 4 would provide the biggest potential benefit in terms of providing Calgarians in need with a more simple way to apply for and find affordable housing, a result of the higher risk for both the design and implementation of Option 4 which significantly reduces the likelihood of success, Option 3 to centralize its housing application, assessment and placement functions, is recommended to The City of Calgary as the option to further design and implement.

Option 3 addresses improvements to key intake steps associated with applying for affordable housing, namely centralized screening, assessment and matching. This recommendation option should therefore achieve the following potential benefits that address the key findings observed from engagement with stakeholders and subsequent considerations for One Window:

- Improve client experience through a centralized application system that reduces the number of applications clients complete
- Improve client level of service through user-friendly access to housing provider information and standardized assessment processes
- Increase efficiency of matching clients to housing availability and corresponding reduction in application processing times
- Enable centralized assessment and matching through technology and delivery upgrades, and
- Align common policies for affordable housing.

A high-level implementation plan has been prepared to support the implementation of Option 3. An overview of this plan is presented on the following page.

High-Level Implementation Plan

Based on the analysis, **Option 3 presents a more feasible path to implement a One Window solution**, including an acceptable level of effort and complexity. Over time, Option 3 could be built upon to add the additional case management functionality, once a common way of working with clients and between housing providers is established and matured.

A **phased approach** is recommended for the implementation of Option 3 – This will involve building and implementing improvements to the systems and processes that support the intake steps in sequential releases. Each release will be executed in chronological order, starting with improvements to processes and systems linked to screening (Option 1). Release 2 will address improvements to matching (Option 2), and Release 3 will enhance assessment processes and systems (Option 3). Improvements will be monitored after being implemented, with each release being assessed for success and resolution of unintended consequences before confirming a go/no-go decision for commencement of the next release. The phased approach to implementing Option 3 is provided on the following page, including the key activities and milestones for the high-level implementation plan.

Should The City agree and move to advance towards One Window, a high-level implementation plan has been prepared to support the implementation of Option 3, enabled by technology. This plan includes the following elements and is presented on the following page:

Key activities and milestones – this outlines the key work steps that will need to be completed by The City and professional resources to design, build, implement, monitor and complete One Window.

Project structure – this outlines the key resources who will support the work to be completed.

Ongoing engagement with housing providers – this emphasizes that continued participation and buy-in from housing providers, which is crucial to the ongoing success of One Window and will remain a key success factor for its successful delivery and adoption.

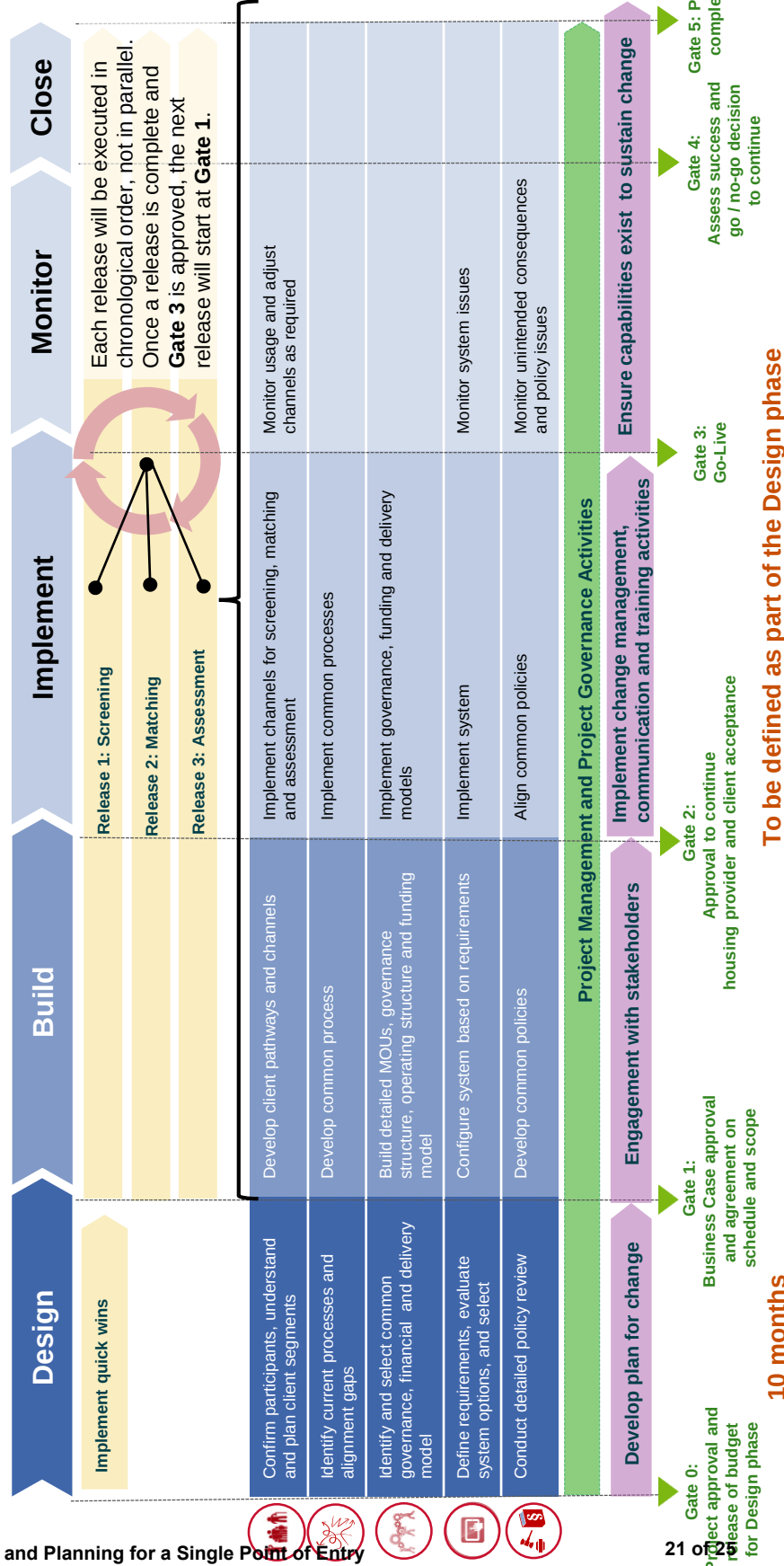
- **Quick win activities**– this highlights tasks that The City can start and complete within a relatively short timeframe, which could provide initial improvements to the client's experience in accessing the affordable housing system as well as present opportunities to further engage with housing providers.

- **Potential change and benefits**– this provides an understanding of the key changes and potential benefits that The City may face as it moves forward to implement the One Window affordable housing intake system. These have been identified against a number of elements, including stakeholders (housing providers, clients), processes, policy alignment, workforce, organization / governance, and privacy.

Key Activities and Milestones

As mentioned previously, due to the large number of housing providers and the complexities associated with the implementation of Option 3 – including a high degree of cultural and change management, transition management, and high degree of dependency on housing provider participation - a phased approach that incorporates high ongoing engagement is required. Work completed to date on the current state, options analysis, and recommended plan will feed directly into the design phase. The engagement stage of this project will provide the foundation for this work and it is recommended that The City capitalize on this from a timing perspective.

A summary of key activities is outlined below. An overview of preliminary estimated market costs for the design phase is presented on the following page.



Quick Wins

In addition to the options identified and assessed, several quick win opportunities were identified during engagement with both housing providers and clients. These quick wins present opportunities to leverage positive impact towards a One Window solution, with relatively low risk and input. They represent improvements to the status quo of the affordable housing intake system that can be delivered within a relatively short timeframe create visible and positive change.

Quick wins therefore present short-term opportunities that can be undertaken with:

- High benefit-to-cost ratio
- Narrow and focused scope
- Relatively low risk, and
- Potential to enhance and sustain stakeholder buy-in.

The table below provides a list of quick wins that were identified during the course of the current planning and scoping phase of the One Window Project for action by The City together with support from participating providers. The quick wins focus on being client-centric and action-oriented, and present short-term means to commence the advancement towards One Window. It is envisioned that the quick wins will be implemented during the proposed design phase of the high-level implementation plan.

Quick Win	Description
Create directory of non-market housing options	• Create and distribute a directory of non-market housing options, with contact information and basic eligibility information for all housing providers. • Develop content as a communication targeted toward clients, containing the specific information that would be helpful for them.
Obtain client consent to share information with self-selected housing providers	• Request permission from future applicants at participating housing providers to share their information with other housing providers • Clients opt-in to share information with housing providers, by completing a consent form as part of housing application
Pilot co-location of intake staff from various housing providers	• Pilot co-location of intake staff from multiple housing providers at one or more central locations (e.g. SORCe) • Clients presented with a centralized kiosk with access to multiple affordable housing providers catering to a diversity of client situations

The next page provides an overview of preliminary market cost estimates for the design phase.

Preliminary Market Cost Estimate - Design Phase

In developing an estimated cost to complete the Design phase activities (i.e. validate potential solutions / market, define requirements, system evaluation / selection, quick wins) two approaches have been identified. Note that these estimated costs are based on an assumption that technical and business artifacts would need to be developed from scratch . These estimated costs represent services provided by external systems integrator (SI) resources at a mid-level market range of costs; they do not take into account the cost of internal City resources, or the cost of involvement of housing providers or other stakeholders.

- Approach 1 | Co-Create with Representative Sample of Housing Providers** – This approach is preferred and would complete the detailed requirements activities with a sample of affordable housing providers who represent the demography and client groups services within the affordable housing system in Calgary. Under this approach, fewer housing providers would be involved upfront, while all affordable housing providers would be involved in validating the draft requirements. With a smaller and controlled stakeholder group, this approach allows better scope focus, control and risk reduction. This approach could be completed within **10 months** at an estimated cost of between **\$0.62 to \$2.48 million** to complete the Design phase.
- Approach 2 | Co-Create with All Housing Providers** – This approach would complete the detailed requirements activities with all affordable housing providers through a series of meetings and workshops. This approach could be completed within **13 months**. The estimated cost to complete the Design phase is between **\$0.89 to \$3.53 million**.

Approach	Estimated Cost (in millions)			Estimated Duration	Assumptions
	Low (-50%)	Medium	High (+100%)		
1. Co-Create with Representative Sample of Housing providers	\$0.62	\$1.18	\$2.48	10 months	0.5 months for initiation, 5.5 months for requirements and 4 months for system selection - Between 10 and 20 affordable housing providers would be involved in the development of requirements; the remaining housing providers would validate the requirements
2. Co-Create with All Housing providers	\$0.89	\$1.76	\$3.53	13 months	0.5 months for initiation, 8.5 months for requirements, and 4 months for system selection - All affordable housing providers would be involved in the development of requirements

Recommended next steps are listed on the following page.

Next Steps

To move forward on the design activities necessary for the One Window system, The City will need to:

- Maintain engagement with housing providers to manage expectations and confirm participation for the Design phase
- Explore possibilities for governance and delivery models with participating housing providers
- Define its detailed business and technical requirements with participating affordable housing providers
- Select an alternative housing system through a procurement process
- Conduct a detailed policy review for screening, matching and assessment criteria, and
- Launch an initiative to address and capture quick wins on processes based on the requirements work.

This will require between 10 and 12 months to complete, depending on the implementation approach to complete the design activities.

Next Steps:

As a next step, The City will need to:

- Validate the information contained within this report
- Obtain approval from Council on the recommended option
- Mobilize the project governance
- Begin to develop a more detailed plan for its design activities, including prioritization of quick wins
- Explore the feasibility for other housing options to be included (e.g. shelter beds, emergency beds, transitional housing), and
- Continue to engage housing providers.

For more detailed information on each of the sections contained within this Executive Summary, please read the full report which starts on the following page.



kpmg.ca



© 2017 KPMG LLP, a Canadian limited liability partnership and a member firm of the KPMG network of independent member firms affiliated with KPMG International Cooperative (“KPMG International”), a Swiss entity. All rights reserved. The KPMG name and logo are registered trademarks or trademarks of KPMG International.

KPMG LLP (KPMG) has been engaged by The City of Calgary (the Client) to conduct a scoping and planning review for a Single Point of Entry solution for the Non-Market Housing process pursuant to the terms of our engagement agreement with The City of Calgary dated November 23, 2016 (the “16-1702 for Scoping and Planning of a Planning for a Single Point of Entry into the Non-Market Housing System”). KPMG neither warrants nor represents that the information contained in this Report is accurate, complete, sufficient or appropriate for use by any person or entity other than the Client for any purpose other than set out in the Engagement Agreement. This Report may not be relied upon by any person or entity other than Client, and KPMG hereby expressly disclaims any and all responsibility or liability to any person or entity other than the Client in connection with their use of this Report.