



BOARD REPORT

REPORT No.: 2023-40
MEETING DATE: OCTOBER 19, 2023
SUBJECT: PROCESS REVIEWS UPDATE

RECOMMENDATION

For information only.

REPORT SUMMARY

To present The District of Thunder Bay Social Services Administration Board (the Board) with an update on process reviews and their outcomes.

BACKGROUND

The Board approved Strategic Plan 2023 (the Plan) on October 17, 2019, by Resolution 19/94. Within this plan, “Improve Processes for Change” was identified as a Strategic Direction. The objectives identified under this Strategic Direction were as follows:

- **2020:** A formalized process for process reviews. Priorities framework for processes
- **2021:** Internal, cross-functional, service system planning table with quarterly meetings
- **2022:** One process review per division
- **2023:** Process Review Report
- **2023:** 25% of frontline TBDSSAB staff have been involved in process review

COMMENTS

Process reviews are conducted to assess existing process for potential efficiencies and in preparation for anticipated change. These reviews benefit all areas of the organization and draw upon internal expertise, industry best practice (from both public and private sector), performance data (generated internally and externally) and performance criteria and metrics.

Process Review Lead

The non-union position of Process Review Lead was included in the year 2020 budget and filled in July 2020. The Process Review Lead is responsible for facilitating process reviews and championing continuous improvement principles and practices across the

organization. This role involves working closely with process review teams to lead optimization projects, analyze processes and practices, develop strategies and monitor progress.

Policy, Procedure and Request Form

In 2020, a Process Review Policy, Procedure and Request Form were developed to establish clear guidelines related to the development, implementation, and evaluation of process reviews.

Priorities Framework

In 2021, a priorities framework was established to ensure a consistent and equitable evaluation of process review requests. The evaluation matrix includes factors such as strategic direction impact; legislative compliance; urgency and timing constraints; efficiencies and effectiveness; organizational engagement and impact; and evidence-based practice of other service managers, service providers and/or comparable private sector organizations.

Board Updates

The Board received an update on the progress of Process Reviews at the September 2021 Board Meeting, with additional updates through the quarterly Strategic Planning reports.

Continuous Improvement

The Process Review Leads conducts a lessons learned session at the conclusion of each process review. In 2023, a thorough review of all lessons learned was completed to identify areas for improvement and barriers. Furthermore, a meeting with the Executive Management Team (EMT) was held on June 16, 2023, to discuss experiences between 2020 and 2023 and highlight areas for improvement. During this meeting, participants identified key improvement areas.

The Process Review Policy, Procedure and Request Form have been revised to incorporate the improvement areas identified by the EMT and lessons learned. The implementation of the revised documents commenced in October 2023.

Process Reviews

As of September 29, 2023, a total of 23 process reviews have been completed and 4 process reviews are currently in progress. The majority of process review teams consist of cross-departmental frontline and management staff. Through the course of these process reviews, supervisory staff participated 117 times and frontline staff participated 75 times. Thus, 40% of process review participants have been frontline staff, exceeding our targeted 25% frontline staff participation rate.

A summary of completed and ongoing process reviews is provided below.

Completed Process Reviews

Title	Description	Type	Lead Division	Year
Supervisor File Review	Formalize a monthly file review for active Ontario Works files	Process Review	Integrated Social Services (ISS)	2020
Employment Outcomes	Document and identify efficiencies in employment program delivery	Project	ISS	2020
Ontario Works Overpayment Review	Document and understand cause of overpayments, seek efficiencies	Project	ISS and Corporate Services (CS)	2020
Digitize OCCMS Files	Implement digital files for OCCMS	Project	ISS	2021
Overpayment Advocacy Project Request	Advocacy for participation in Overpayment Recovery Unit for Ontario Works inactive/aging overpayments	Project	ISS and CS	2021
Caseworker Activity Report Caseload Analysis	Understand conditions, actual and best practices for caseload establishment	Analysis Project	ISS	2021
Emergency Response Procedures and Scheduling	Review procedure and schedule of responders to find efficiencies	Project	ISS and CS	2021
Housing Move Out Project	Understand, document and propose efficiency to the Housing Move Out process	Analysis Project	ISS	2022-2023
Digitize Housing Applications	Move paper housing applications to digital resource	Project	ISS	2021
Caseworker Activity Report Appointment Completion Analysis	Understand appointment completion conditions for Ontario Works caseworkers and best practices	Analysis Project	ISS	2021
Business Expense Claim Process Review	Investigate ability to digitize business expense claim procedure	Project	CS and CAO	2021
Signing Authority	Review authority for appropriateness, fit with legislation and best practices; propose revised procedure	Project	CS and ISS	2021-2022
Safety and Security in Satellite Offices	Following the review of safety at HQ, study and propose changes to	Project	ISS	2021-2022

	safety procedures in satellite offices.			
Time Study Tool	Create a flexible tool to conduct time studies by position	Process Review	ISS	2022
Funding Recipient Application, Agreement and Reporting Process	Review and standardize external grant application and review tools.	Project	CS and ISS	2022
Team Clerk Position Study	Pilot the Time Study Tool with the Team Clerk position.	Pilot Project	ISS	2022
Routing Efficiencies	Understand delays in document routing and propose efficiencies.	Project	CS and ISS	2022
Online Housing Application Implementation	Implement Rent Café online housing application; adjust business practices & documentation	Project	ISS	2022-2023
Tenant Move Out	Document processes, document bottlenecks and seek efficiencies for move outs.	Analysis Project	CS and ISS	2022-2023
Childcare File Review	Using the tool created in the Ontario Works project, modify existing fee subsidy file review process.	Process Review	ISS	2022
IRO Process	Review/revise position description and processes related to Internal Review Officer work.	Project	ISS	2022
Review of Skywire	Understand the use case of our current scheduling tool	Project	CS and ISS	2023
Data Sheets Review	Review of top internal workbooks with data integrity issues	Project	ISS	2023

In progress Process Reviews

Title	Description	Type	Lead Division	Year
Communications - Complaints Project	Create and pilot a tool to better manage incoming feedback with a focus on corporate complaints.	Process Review	CAO	2023
Housing Properties on Website & Online Housing Application	Update TBDSSAB website (property listings and photos) and Rent Café online housing application (photos)	Project	ISS	2023
Internal Spreadsheet Review	Identify, review and propose changes to internal spreadsheets with known data challenges	Project	ISS	2023
Tenant Charge Back Pilot	Resulting from the Housing Project, pilot a new procedure for tenant charge backs.	Pilot Project	ISS and CS	2023

In order to demonstrate the effectiveness of process reviews, below are examples of achieved outcomes from three completed process reviews.

Title	Outcomes
Supervisor File Review	<ul style="list-style-type: none"> Conducted meetings with and surveyed other sites to understand best practices for file review processes and tools. Formalized the 'file review' process and defined it as the review of open, active files related to Ontario Works recipients. Created a new monthly file review tool for Supervisors based on resources from other sites and best practices. Launched a pilot project from January to February 2021, refined results; added measures for reporting and integrated Electronic Data Management (EDM) and Guiding Employment Resources Efficiently (GERE). Officially launched the monthly file review tool in March 2021. Monthly file review results are reviewed monthly in Supervisor meetings. Received a positive response and results from impacted staff. Collaboratively review and adjust the tool as needed, a minimum of every 12 months.
Signing Authority Project	<ul style="list-style-type: none"> Convened senior leadership to revise the procedure in a short timeframe. Gathered information from comparable organizations, including colleges and universities. Revised the procedure to better reflect comparable organizations. Enhanced the procedure to improve staff workability. Prepared and presented the procedure and briefing note to the Board of Directors.

Online Housing Application Implementation	<ul style="list-style-type: none"> • Engaged a positive, cross-functional team that collaborated effectively. • Built on the previous project of digitize housing applications. • Conducted extensive testing of the online application. • Adjusted the existing PDF application. • Connected with and learned from other sites with the application enabled. • Changed the business process to enter applications upon receipt. • Reduced the required supporting documentation for applications, effective January 1, 2022. • Piloted the online application with two service agencies, including training, feedback sessions, and other discussions. • Communicated with all staff about the incoming pilot, its success, and its move to production.
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STRATEGIC PLAN IMPACT

This report aligns with the “Improve Processes for Change” Strategic Direction and its respective objectives.

FINANCIAL IMPLICATIONS

There are no financial implications resulting from this report.



CONCLUSION

It is concluded that the objectives identified under the “Improve processes for change” Strategic Direction have been successfully achieved.

Administration remains committed to continuous process improvement.

REFERENCE MATERIALS

None

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