

Refugee Claimant Housing Referral and Data Management System Advisory

MINUTES

Meeting #9: Wednesday April 28, 2021 1:00 PM (Zoom)

Present: Marzieh Nezakat (MOSAIC), Sherman Chan (MOSAIC), Jacqueline Sarvini (MOSAIC), Lynda Truong (MOSAIC), Richard Belcham (Inasmuch/MAP BC Co-chair), Joni Rose (MUNI), Jenny Lam (Options/MAP Co-chair), Nicole Stinson (BC Housing), Demetrius Schwab (Union Gospel Mission), Vanessa Roth (Journey Home Community), Julia Wu (BC211), Ali Mustafa (Independent), Negin Saheb Javaher (AMSSA), Jenny Moss (MAP Executive)

Regrets: Alexandra Dawley (MOSAIC), Lavinra Joseph (BC Housing), Sabrina Dumitra (AMSSA)

Meeting Chair: Marzieh Nezakat (MOSAIC)

- Marzieh acknowledged that she was speaking from the unceded Coast Salish peoples territory in North Vancouver and thanked the Ministry for its funding of this project.
- A round of Introductions were made to welcome Lynda Truong, practicum student working with the BC CHARMS Project Team at MOSAIC.
- The Agenda was reviewed and approved with no further additions.

Project Updates:

- **BC CHARMS Report Book**
 - It's going to reflect the results obtained from the online survey and interviews with the stakeholders, namely the service providers and refugee claimants.
 - The first draft is complete and is under review by the project team.
 - The BC CHARMS team met with CEO of Landlord BC who offered to write a letter of support for refugee claimants to gain housing. This is a major accomplishment!
- **Privacy Impact Assessment (PIA)**
 - The PIA is being prepared by the consultants – there have been two drafts so far.
 - The BC CHARMS committee are working on a final robust draft for feedback from the Advisory.
- **Build vs. Buy Discussion**
 - The main objective of the project is to build a better referral system for refugee claimants along the continuum of housing.
 - Detailed scoping exercise of the existing housing inventories, related referral systems (within BC, other provinces, and internationally) was conducted
 - Results: Deepened understanding of the existing system's customizability scope, required budget, and timeline of delivery was gained
 - Consultations were sought with 4 independent tech consultants and software developers to indicate the pros and cons of building the database from bottom-up

Richard Belcham (Inasmuch) has created a **Decision Document** to make the selection easier (see attached).

DECISION #1 – BUY OFF THE SHELF OR BUILD FROM SCRATCH?

	Consider Building	Consider Buying
Software Development & Maintenance	Software development and maintenance are part of our core business and organizational competencies	Software development and maintenance are <u>not</u> part of our core business and organizational competencies
Licensing the Software	Potentially licensing the software to other organizations in the future as a potential revenue source is of interest to us	Potentially licensing the software to other organizations in the future as a potential revenue source is <u>not</u> of interest to us
Our Needs & Existing Software Products	The needs we are trying to address via the software are highly unique and not comparable to those in other organizations/jurisdictions	The needs we are trying to address via the software are comparable to those in other organizations/jurisdictions and have already been adequately addressed by existing software products
Design Control	A high degree of control over the design of the system is important to us	A high degree of control over the design of the system is not important to us, as long as it reasonably meets our requirements
(Non)Existing Software Products	No software products already exist that meet our needs	One or more software products already exist that meet our needs and are within our budget
Time	We have adequate time to build a new software application from scratch and a high tolerance for potential schedule delays during the development lifecycle	We have time constraints and/or lower tolerance for potential schedule delays during the development lifecycle
Funding	We have adequate funding to build a new software application from scratch and a high tolerance for potential cost increases during the development lifecycle	We have funding constraints and/or lower tolerance for potential cost increases during the development lifecycle
Technical Human Resources	We have adequate technical human resources with a guaranteed long-term commitment to the product and organization	We do not have adequate technical human resources with a guaranteed long-term commitment to the product and organization
Risk	We do not wish to outsource some risk to a software vendor	We wish to outsource some risk to a software vendor

DECISION: After several consultations, the team decided it was better purchase and customize an existing product – even though there are considerable costs, there would still be costs around maintenance, hosting, sustainability and more that would take us beyond the scope of the initial project funding.

DECISION #2 – WHICH PRODUCTS ARE OFF THE SHELF, CUSTOMIZABLE, AND POSSIBLE CANDIDATES?

Customizable products that are available: HIFIS: Homeless Individuals & Families Information System; iCAROL; iCARE; OCMS; NewTrack; Salesforce; BC Housing Connections • BC Housing Registry; Apricot 360; Efforts to Outcomes

DECISION #3 – EXAMINING SHORTLISTED CANDIDATES

The team looked at them all and talked to each company in order to be able to short list. The results of short listing are: **HIFIS, Apricot 360, and BC Housing Registry/Connections**

Name	Description
HIFIS	• This federally owned system only makes licences available to Designated Community Entities (funded by Service Canada) through its Reaching Home program, except in BC. • In BC, there is only one instance that has been licensed and that is with BC Housing. BC Housing is unable to issue a sub-license for BC CHARMS and HIFIS will not issue a separate licence to BC CHARMS.
Apricot 360	• This is a software as a service (SaaS) product that is designed for non-profits. • It can be customized to suit the requirements of BC CHARMS and has a housing/beds module that will be released to augment the current system. • The forms, workflows and reporting can all be customized, and all data is housed in Canada. • It is a per-user subscription model that also offers full training, product support and maintenance packages.
BC Housing Registry/Connection	• This system can't track referrals from beginning to end. It works well for one referral but not for a continuous care model like BC CHARMS tracking people from arrival through to market housing. Additionally, the Housing Connections database only contains supportive housing that is funded by BC Housing, so not anyone can join. • The HC Database is used to connect and interface with the BC Housing Registry, which is focused on long-term housing and tenants, not for people moving through a system. • While there is some synergy between the Housing Connections database and our own, the differences are substantial and there are no instances of any sub-licensing or difference instances being customized. • Finally, and crucially, it's nearly 16 years old and due to be replaced at any time now, so is not a long-term solution in any case. The software has come to the end of its useful life.

DECISION: Only option was Apricot 360 as an off the shelf customizable product.

DECISION #4 – SUSTAINABILITY AND LICENSING

The project is funded for two years, but naturally we need the system to go beyond the project limits. Apricot 360 will issue user licenses for five years, and training / support packages accordingly which will mean full support for the product moving forward, continued product improvement and will bear the costs/risks for the software. ... we believe that sustaining the project for five years is a realistic and sensible approach and will allow further time for developing a sustainability plan.

Joni (MUNI): The Ministry is very pleased with the process but concerned because the funding cannot go on to 5 years. However, the ministry has been able to extend funding to March 31, 2023. We need to look beyond that date as this funding always has this restriction.

Richard (Inasmuch): We're making good progress on funding by other sources beyond. At the same time planning beyond 5 years is difficult and risky as there could be impacts from unpredictable events (like new Reception Centre, or maybe IRCC funding). Right now, we have time to customize and test a good system that will be sustainable.

DECISION: We decided that building our own system was just too challenging – could have cost overruns and includes many risks. So, the decision would be to go with Apricot 360 5-year subscription customizable model.

DECISION #5 - BUDGET

We would like a 5-year contract, but we only have funding for 2 more years (with MUNI's new addition of one year extension) so can we have a 'get out' clause from the vendor?

Richard presented 2 options:

1. Commitment to 5 years: \$307,974 (paid for through regular MUNI funding + extra year just provided, and a get out clause after 2 years if we cannot find alternative funding)
2. Fixed 2-year contract: \$152,000 (20% higher cost than 5 year)

* Apricot has committed to same price for 5 years with the 'get out clause' (5 years it's cheaper)

DECISION: As a more economical and long-term prospect with time to tweak the program we decided Option 1 would maximize the impact on helping RC's from arrival to getting to market housing.

RECOMMENDATIONS

Based on the decisions outlined above, we recommend moving forward with Apricot 360 as the BC CHARMS housing referral system, by signing a five-year contract (with a two-year get out clause) to lock in best pricing.

This system will be used to maximize our efforts and impacts on refugee claimants – from the day they arrive to market housing.

TIMELINE OUTLINE

Months	Description
April 2021	Contract drafted, agreed, and accepted
May 2021 – July 2021	- Build out, customization, and implementation - Communication and launch plans drafted and approved Preparation of launch materials - Preparation of training plan and documentation Pre-launch communication plans initiated - Pilot users chosen
August 2021 – October 2021	A/B Testing phase underway with pilot users Implement any necessary changes
October 2021	Implement pre-launch communication plan
November 2021	- Begin pre-launch training - Sign up users and issue licenses
January 2022	- Full launch of system - Continue communications and training new users - Request user feedback and amend system if necessary
February 2022	- Conduct first month review and collate additional feedback - Run first month reports and create additional reports if necessary
March 2022	- Three-month review - Communication plan continues

Note: This is a rough timeline – it'll likely shrink because this system is already close to what we need. We predict that we'll be able to move this timeline forward, but rather than commit to something (and as a result, over-promise and under-deliver), we wanted to illustrate an extended timeline. It highlights what we'll need to think about in regard to training, communications, pilots, pre-launch, user licences, and more.

DISCUSSION

Nicole: I know that there was a lot of research and due diligence that went into this and a lot of back-and-forth with BC Housing folks.

Richard: Thank you to BC Housing. It was hugely appreciated.

Nicole: Our current system is at the end of its life and we don't really know what our IT department's plans are. It's good to keep communicating on this and learning from one another, so having that door open is excellent.

Nicole: I noticed in the document that there were a couple of housing providers that currently use the Apricot 360 program...

Richard: They use ETO, which is part of the Apricot 360 family.

Nicole: So is there anyone in the sector that uses this program?

Richard: There is, but not in BC. It's used in places in Alberta and quite a number of places use it in the US. Very similar organizations doing very similar work.

Nicole: My only concern overall – and this may not be avoidable – is the administrative burden on the housing providers themselves. I know that those that receive subsidy from us (BC Housing) have a lot of paperwork that they have to go through that stays a part of HIFIS and Housing Connection.

Richard: One of the ways that the systems will work is that it is settlement and housing worker-led. They're able to control that work flow a little bit. It's about making it simple and easy to use. I hear you about the administrative burden – and that's something that we want to take away, both from settlement workers and housing workers. Inevitably there's going to be the big intake document, and that'll take a little time, but from an updating vacancies from a referring to another agency perspective, it's way easier and much simpler than what I thought it would be.

Nicole: It's also good that there is a plan for testing.

Richard: There's also a really housing bed module that's coming up that we saw a pre-demonstration of and by the time we go live with it, it should be included. It will be easy, for example, for transition houses – where we have different set ups and possibilities that we can very easily and quickly update to say that we have these number of beds in this room and these number of suites in this house. It's a very quick process.

Joni: It'd be nice to know that BC Housing providers are part of the test plan and part of the user testing so that there is some input into the administrative burden.

Richard: AGREED

Joni: And maybe it's more so the design than the testing phase – like, early on in the whole interface, that they would have to participate in and would have some input.

Nicole: There's BC Housing and BC Non-Profit Housing Association – they represent the non-profit sector. It's a good time to engage with them.

Richard: And MAP has a really good working relationship with BCNPHA. We're looking forward to connecting with them and letting them know that this system will be something useful for them to consider.

Richard: Thanked MOSAIC team and MUNI support to see a successful program.

MOSAIC: also thanked Richard for his input and expertise.

Joni: Could we see the timeline again?

Richard: This is the original one – it'll need some adjustment. Realistically, all of this will be moved up.

Marzieh: The vendor will be able to start implementation on the first day of each month. For example, if we close the contract this month (April) then they can start the implementation and customization on May 1st. It'll take 8 weeks to do the implementation and customization, and after 2 months, we'll have the system ready.

Richard: It'll all move up by about 6 months.

Marzieh: We'll have a demo ready mid-way through the design so that everyone can be involved with what's going on around the customization. I've shared the Systems Requirements Document (without the privacy pieces, since they're under preparation), so all of you can refer back to that document if you have any questions about the system design and all of that.

Richard: Are you content, as the advisory board for the project team, to move forward with the next stage of implementation with Apricot 360 (i.e., 5-year contract with a 2-year get-out clause)?

[Majority vote: 7 thumbs up – approved!]

Suggested Date for Next Meeting: May 26th

(Depends on the implementation and when Apricot will be ready to provide a demo for the advisory committee.)