

Headquarters

97 Libbey Industrial Parkway
Suite 300
Weymouth, MA 02189
Phone: 781-616-2100
Fax: 781-616-2121
E-mail: info@capv.com
www.capv.com

Europe

3rd Floor, Sceptre House
7-9 Castle Street
Luton, Bedfordshire,
United Kingdom LU1 3AJ
Phone: +44 1582 400120
Fax: +44 1582 411001
E-mail: euro.info@capv.com

Japan

Hiroo Office Building
1-3-18 Hiroo Shibuya-ku
Tokyo 150-0012 Japan
Phone: +81 3 5475 2663
Fax: +81 3 5475 2710
E-mail: yoshida@gsm.to
www.gsm.to

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Dynamic Content Software Strategies Consulting Service

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Content Centric Collaboration: The View from Windsor-Essex County Housing Corporation

Projects to improve collaboration are often viewed as infrastructure undertakings that can span months and strain resources. Because of this, many organizations are wary of starting a project even if the end result will prove beneficial for the company. It is important to realize, however, that even a project with a relatively smaller scope can provide great benefits as well, in ROI and in less measurable ways.



One area where this is evident is in processes that require forms to be filled out and history to be kept with references to specific documents. The need for this spans many industries and is particularly evident in the government, legal, and healthcare segments. Organizations are increasingly moving away from paper and towards online access to and submission of information. In the U.S. alone, over 42 million Tax Professionals filed tax returns electronically in 2004 (<http://www.irs.gov/efile/article/0,,id=118663,00.html>).

This trend of online filing is only expected to gain steam, and it is easy to see how other industries can benefit from this type of functionality.

In fact, the more that collaboration is required between process participants, the more beneficial an online solution can be. In the bidding and awarding of contracts for services, a collaboration solution can pay itself off in spades. The Windsor-Essex County Housing Corporation (WECHC) is an example of a project that did not have enterprise scope, nor did it require a great deal of money and resources to complete. Nevertheless, the project provided very real improvements in the areas of distribution of materials, project history and searching, and quality of materials to an office that is vital for many residents of the Windsor-Essex region.

Windsor-Essex County Housing Corporation At A Glance

Headquarters: Windsor, Ontario
Founded: May 7, 1952
Population of City of Windsor: 300,000+
Units Served: 3,500

Organizational Overview

To get a feel for the value that The Windsor-Essex County Housing Corporation provides, it is helpful to know its vision statement:

Windsor-Essex County Housing Corporation will provide the municipalities of the City of Windsor and the County of Essex and our residents with strong, vibrant communities of economic housing. We are committed to housing the neediest residents of the province of Ontario.

We will make all of our activities responsive to our residents' needs, environmentally friendly, supportive of a healthy community, and competitive with other housing providers.

**Windsor-Essex County
Housing Corporation
Mission**

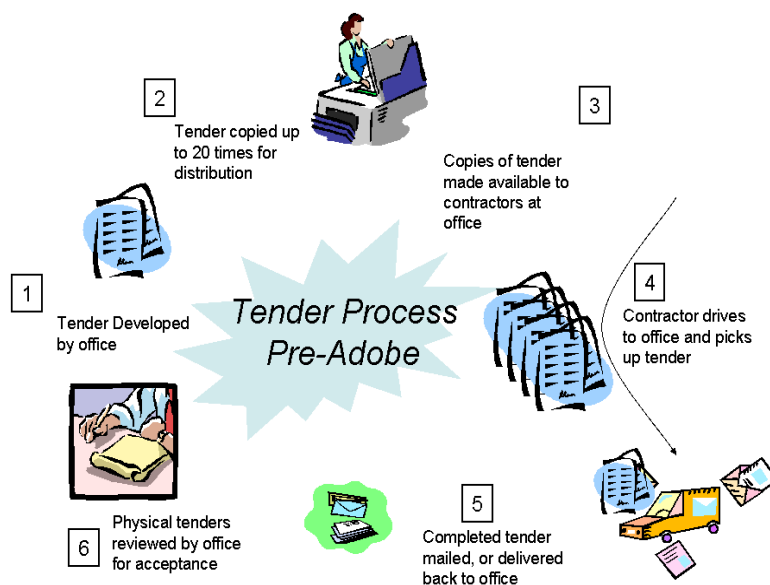
To provide safe, clean, affordable housing to the residents of the City of Windsor and the County of Essex as a whole, and tenants in particular and to provide access through the Central Housing Registry.

The core services that WECHC provides are managing and delivering public housing and private rent supplement programs to the people of the Windsor-Essex area. The key activities towards delivering these services are the operation of the Central Housing Registry, tenant placement, property management, asset management, and fiscal responsibility.

In providing these critical services to the community, The Windsor-Essex County Housing Corporation manages over 3,500 units in approximately 460 buildings. Most often built between the 1950s and the 1970s, these buildings range in size from 24-story high-rises to single-family units. Not strictly a private or public entity, the Housing Corporation is funded first through rental income, then by Essex County taxpayers, and finally through the Canadian federal government. As such, approximately 50% of the corporation's revenues come from rent, and 50% come from government subsidies.

With so many buildings, the organization is constantly making improvements and repairs. From simple landscaping to full roof replacements, the work seemingly never ends. Each job, of course, must be put out for bid – called a “tender.” About 50 - 55 of these tenders are issued per year at a total dollar value of \$3.5 - \$4 million Canadian. When a contractor “wins” the tender and starts a project, he/she must keep a strict history of the work done, project spending, and timeline. With some projects lasting years in duration, keeping track can be quite a challenge.

Business Drivers for Collaboration



The WECHC has many processes that require action from the office itself and the contractors involved. The initial tender process, for example, requires constructing the tender, distributing it to interested contractors, receiving completed bids, and deciding on a winner. Once a tender is won by a contractor, the project must be tracked to ensure that work is being done in a timely manner and on budget.

In the past, all this had been accomplished with good old hard copy forms – paper. Tenders were typed out using a word processor, printed, and copied up to twenty times. They were kept at the office and contractors from across the county had to drop by to

pick up any that were of interest. Once in possession of the tender, a contractor would complete the required steps and mail or deliver the document back to the WECHC office for review.

Another problem with the old process was that some contractors would invariably miss out on tenders they would have been interested in. While the WECHC is obligated to advertise tenders in the legal section of the region's newspapers, there was no guarantee that all interested contractors would see the ads.

It is clear that this process was not ideal. It required excessive amounts of time for copying tenders, was prone to oversight errors, and wasted a significant amount of paper and ink. Between copying, collating, and the requirements on contractors, the process had become far too labor-intensive to continue. That's when the Windsor-Essex County Housing Corporation turned to Adobe Systems, Inc.

Challenges

While many have the impression that technology projects can be difficult undertakings, WECHC had very few problems involving the actual software. That is encouraging because in a project of this size, with limited resources to implement it, any software problem could literally derail the effort entirely. There were also minimal issues when it came to user training due to the ease of use of the Adobe software and the design of the final solution.

This is significant given that there were really two sets of users: employees from WECHC and contractors. It is inherently easier to train employees and provide assistance to them as necessary to help with solution adoption. It can be more difficult to train those outside the organization, especially if use of computers is not in their core job description. Nevertheless, the project was quickly adopted by all parties involved, helped by some training sessions that were provided for contractors.

This does not mean that there were no problems in implementing the new system. The primary issues were cultural in nature. This is often the case as it is hard to get people to change the routines they are used to, even if it is for something that will save them time and money. In this case, convincing the contractors to adopt the new system was a challenge. After training, however, most contractors were quickly convinced that the new system would be better for everyone.

Steps to Success

The WECHC had a couple stops on its way to efficient tender collaboration. The starting point, as mentioned, involved lots of paper, lots of time, and ultimately lots of frustration. Knowing that the manual process was not sustainable, the office derived an e-mail list as a temporary solution. Each time a tender was made available, an e-mail was sent to a list which contractors could opt in to. The contractors then e-mailed back requesting the tenders they had interest in. These tenders were e-mailed to the contractors, who filled out the required sections and delivered those sections back to the WECHC office.

This was a huge improvement over the original process, which had contractors rifling through newspaper ads and hand-delivering tenders. In a fairly short time, the e-mail list expanded to hold around 200 contractors. After a while, however, it became clear that some underlying problems still remained. While the tender delivery process was much smoother, sending e-mail after e-mail to contractors, each with a different set of tenders, also became overly time-consuming. Other aspects of the process remained virtually unchanged.

Clearly, something else had to be done. The Windsor-Essex County Housing Corporation needed a solution that required less rote, manual tasks and allowed for added features such as searching and improved collaboration. To meet these requirements, an online submission site was planned.

The Solution

The solution was reached using various products and versions of Adobe software. Originally, WECHC was using Adobe Acrobat Version 4, and upgraded to Acrobat Version 5 in accomplishing the contractor e-mail list. To make the step up to online tenders and enhanced collaboration, WECHC implemented

Acrobat Version 6 Professional. Never an organization to become complacent, WECHC is currently testing Acrobat Version 7 Professional in advance of putting it into production.

The Acrobat solution offers many collaboration features that can be leveraged in organizations of all sizes. Acrobat Version 7, in particular, includes improved functionality in a number of areas:

- **Review and Commenting:** A key aspect of many collaborative documents is the ability for contributors to review and comment on the document text. Acrobat Professional allows Adobe Reader users to make comments and edits right in the PDF document.
- **Electronic Forms:** Windsor-Essex County Housing Corporation, among many businesses, makes extensive use of e-forms.
- **Security:** Collaboration, often involving many people in many locations, requires security measures to ensure that unauthorized users are kept out. Acrobat can restrict access to PDF files, and through integration with Adobe LiveCycle Policy Server, users can create an overarching server-managed security policy to apply to PDF documents.
- **Other features:** Acrobat Version 7 offers many other features conducive to content-centric collaboration. Some, such as viewing 3-Dimensional content, have more specialized uses.

A Lesson Learned...

Make Sure Everybody Wins

This project received enthusiastic buy-in from all parties because everyone gained something. The contractors have better access to tenders and an easier time completing them. The WECHC shortens its tender prep time and can save money on add-on requests. The individuals are faced with less tedious tasks to complete and more time to handle the more challenging aspects of their jobs. Everyone wins.

The Results

This project was completed in an extremely reasonable timeframe, especially considering that the work was done by the office itself when time allowed, not by bringing in outside contractors for full-time development. From concept to conclusion, the online site was up and running in under 9 months, including two months for programming and testing.

With relatively limited up-front investments in time and money, the benefits of this project are impressive. Consider the costs, in time and materials, of the original, paper-based process. Copying a tender package alone could take a clerk all day. The new process not only results in saved paper, but also enables users to spend less time on rote tasks. George Robson, VP of Capital and Preventative Maintenance, estimates that the new system knocks one to two days off the original time, allowing for more effort to be put into creating and reviewing the tender content.

As Mr. Robson puts it, “[WECHC] is not just reusing tenders called in the past, we are reinventing them again to fit into today’s new technology improvements.” This includes features such as Web links to products and installing requirements. The WECHC is also able to spend more time researching the products to be used, looking for alternative solutions to issues, and exploring more energy-efficient practices, then making an effort to include them in the tender package. So, the quality of tender packages has gone up considerably.

WECHC has also realized a 30% - 40% increase in the number of tender pickups. For an agency such as the Windsor-Essex County Housing Corporation, this is significant. The more competition for each tender, the lower the price the organization is likely to need to pay for each job. WECHC is partially government-funded, so every Loonie counts.

Speaking of saving money, the catalog index search functionality with Adobe Acrobat has ended up saving the organization more than anticipated. For projects with longer durations, contractors will sometimes ask for “add-ons” – essentially more money for unforeseen expenses or an increase in scope. Before implementing the new system, smaller add-ons were often rubber-stamped without a comprehensive review. This was necessitated because there was no efficient way to go back through project history and determine whether the new money was necessary, and was aggravated by the fact

that the relevant information may have only been a paragraph or two in a 100-page tender. Finding and reviewing this information could have taken hours, if it was found at all.

With the enhanced search provided by Acrobat, the WECHC representative can type in a few keywords and, in seconds, be presented with materials to review. When an add-on request is made, therefore, the reviewer can be looking at the project information concurrently. This has led to many add-on requests being denied, whereas they may have been accepted prior to the implementation of the new system.

For example, Mr. Robson was recently presented with a \$150,000 add-on request for an ongoing project. Under the old system, there was a very real probability that this request would have been accepted. With the new system, however, Mr. Robson was able to review the project materials at his desk while the contractor sat across from him and the add-on was rejected. Just by saving that one add-on, it can be said that the Adobe software has paid for itself.

This project has also paved the way for more complex online collaboration. After a tender is awarded to a contractor, only that contractor has access to that specific tender Web page. Instead of needing to print out materials to give to sub-contractors, manufacturers, engineering firms, and others on the job, these people can be granted access to the secure Web site. Furthermore, each project contributor can be granted different access so that no confidential materials are viewed by unauthorized eyes. This brings all the experts involved in a particular project together in a common area. This results in more project communication and helps keep everyone on the same page.

Figure 1: Windsor-Essex County Housing Corporation Tender Web page Login Screen

WECHC Online Tender Information System - Microsoft Internet Explorer

http://www.wechc.com/tenders/

Windsor-Essex County Housing Corporation
Online Tender Information System

Welcome to WECHC online tender information system

User Name (your E-mail address)

Password

Remember me

Please click [HERE](#) to obtain an account and password.

The following tender documents are available online:

Tender #	Name	Close Date	Addendums?
P.S. 05-04	Vacant Unit Cleaning	11/24/2004	No
P.S. 05-09	Floor Replacement	11/24/2004	No
P.S. 05-03	Furnace and Hot Water Repair	11/24/2004	Yes
P.T. 05-02	Vacant Unit Painting	11/24/2004	No
P.T. 05-03	Pest Control	11/24/2004	No
P.S. 05-14	Grounds Maintenance	12/1/2004	No
P.S. 05-16	Janitorial Services	12/1/2004	No
P.S. 05-02	Electrical Service	12/1/2004	Yes
P.S. 05-01	Plumbing Services	12/1/2004	Yes
P.S. 05-08	Trash & Rubbish Removal (City)	12/1/2004	No

InfoTrends/CAP Ventures' Analysis

As we have seen, content-centric collaboration projects do not need to be long and arduous to produce significant results. The Windsor-Essex County Housing Corporation was able to implement its system in just nine months, with no professional services investment.

This illustrates a critical aspect of many of today's IT projects – low initial investment with quick payback. As mentioned, the entire cost of the project was essentially covered by one unapproved maintenance add-on. Nevertheless, this does not begin to touch on the other benefits of the project, including improved contractor collaboration, decreased tender preparation time, better tender quality, and improved content repurposing and reuse.

While this is not an “enterprise” collaboration implementation, it shows the value of targeted, smaller projects that can be accomplished quickly and inexpensively. These types of projects can represent very real savings in time and effort, and should be searched out, rather than overlooked as too small or minor improvements. As we have seen with Windsor-Essex Community Housing Corporation, significant improvement can be realized with a project of any scope.

Mike Maziarka, Jon Franke