## Advocate Consultation Live Meeting with Tish Lakes

Wednesday, December 12, 2012 (1:30 PM-2:30 PM)

| | |
|---|---|
| **Terri Archer** | Regional Operations |
| **Pardip Bandeccha** | Regional Operations |
| **Colleen Turner** | Information Management Branch *(client online demo)* |

**Meeting Purpose:** To provide an overview of the Channel Strategy and share the proposed online portal for discussion. Further, to engage in further discussion around service delivery enhancement considerations and opportunities.

**In your experience with our clients, what's tricky with the current service delivery channels?**

- Call wait times
- Dropped calls
- New staff, coupled with technology (ICM), has made policy appear more restrictive
- Delays in producing cheques
- Delays in generating Request for Reconsiderations
- Language barriers
- Clients aren't being told that they still have the option of coming into a office to receive service
- Clients being directed to SSAA
- Delays in INA

**Client Online Portal Demo Feedback:**

- Add clearer instruction on the appointment page indicating that this tool is not the only option for getting an appointment time. Needs to indicate other options clearly (i.e., Phone number etc).
- On the community resource page ensure we check with agencies before adding them to the list.
- Have very clear protocol developed for vulnerable clients (i.e., what is appropriate for them to use on the self-portal to ensure they aren't being taken advantage of, extra security etc).
- Be clear on the vision of the portal. The portal is one of the channel for clients to receive service.

**Other considerations:**

- Be careful on what we are assuming regarding our clients capabilities regarding their abilities with technology
- How will the ministry handle situations where the client submits a form on the portal and it is filled incorrectly?
- What will be the response time for questions that are asked on the self portal (i.e., written responses). Will there be a delay?
- Suggest piloting the self serve portal.

## Advocate Consultation Live Meeting with Tish Lakes

- Need to consider resources for managing the portal. The ministry should not reallocate staff to the portal. They need to hire additional staff, as there isn't enough staff for the current channels already.
- Concerns about being too impersonal. Needs to be a balance, as there is a huge benefit in still having conversations with clients, as sometimes clients don't really know what they want, and it comes out by having a conversation.
- Considering linking written responses to other publications (i.e., Your Welfare Right). Might want to consider connecting with Penny from POVNET as they are planning a session with advocates in January.

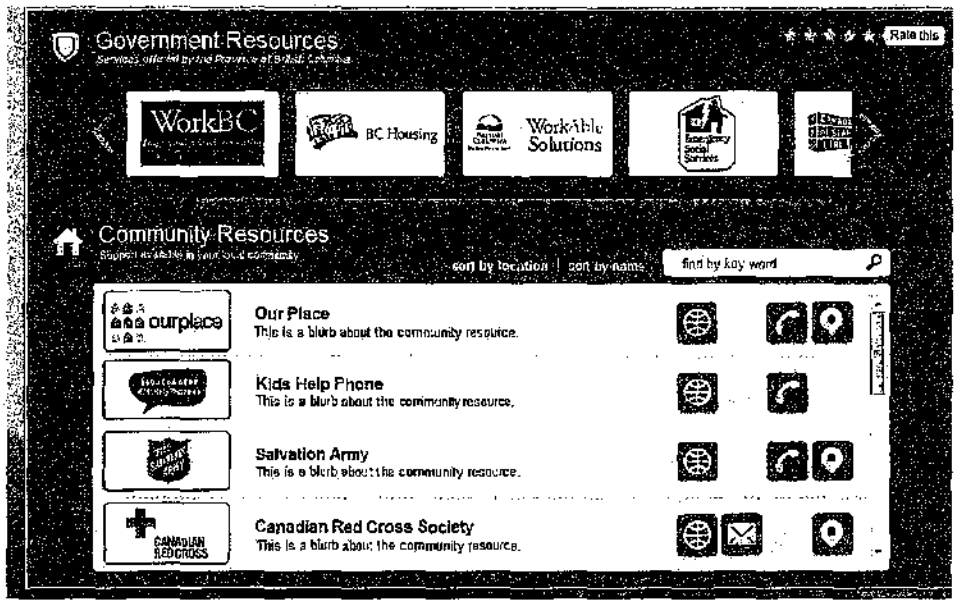
**How should the ministry engage with clients?**

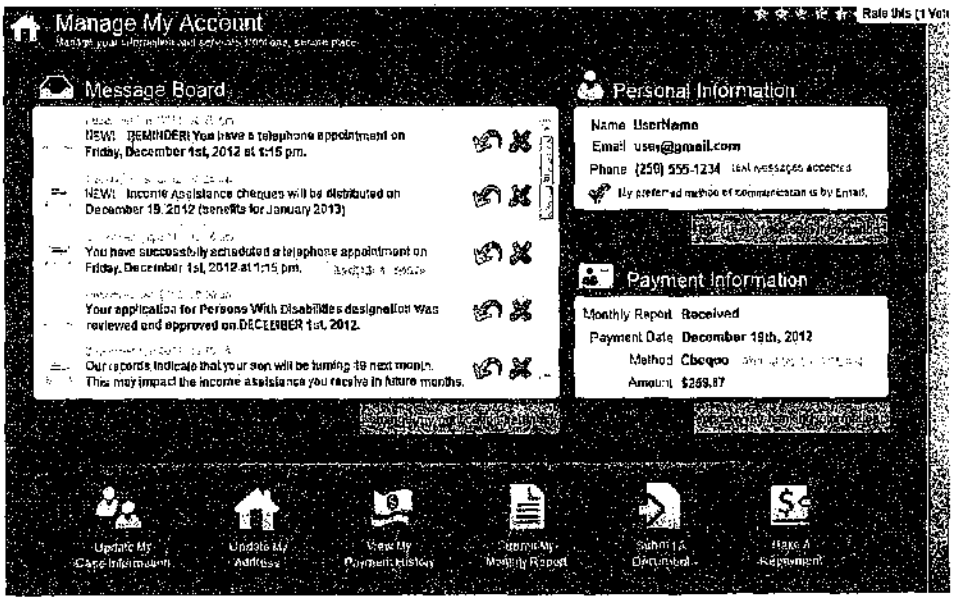
- Consider approaching advocacy group, and asking them to participate in the client engagement. Advocates would recommend clients with a range of barriers to ensure we get a wide spectrum of feedback that represents our caseload.
- Ensure we get feedback from that represents our caseload (i.e., people with head injuries, ESL, multiple barriered clients etc)

**Other Possible Barriers**

- Access to computers
  - ❖ Ensure ministry doesn't reference resources that don't exist. Library would be a good resource.
- Additional pressure on community agencies
- Clients might abuse the communication on the self portal (i.e., continuously contact the ministry with questions)
- Errors happen. What clients might do with an error that they receive in writing through the portal?

## Advocate Consultation Live Meeting with Tish Lakes



Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

LEGEND
Region 2/3 Session (Jan 8 2013)
Region 1 Session (Mar 6 2013)
Region 4 Session (Mar 14 2013)
Region 5 Session (Mar 21 2013)

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful*
- Channels and accommodation not available (available ministry resources vs. actual client need)*
  - Provincial interpretation and accommodation services not being offered despite policy****
  - Need more resources on the frontline*
  - Outreach is good when available *******
- Wait time for all channels are too long (i.e., waiting for Shelter response, client can end up losing housing)
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency regarding information provided to client (client getting different answer for the same request) and repeating story]*******
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic*
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
  - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
  - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs ****
- Develop specialized skills – new workers don't have enough knowledge ******
- Release of Information/Consents – more efficiency needed
  - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., aboriginals, immigrants, refugees and certain segments of caseload)
  - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service*
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks**********
- Difficulty understanding the family bonus top up policy (i.e., new baby)
- Workers need to ensure they record all details of request and interaction history with client. If worker is unsure of what the client is asking, they should be asking clarifying questions and documenting everything***
- Difficulty accessing crisis supplements (what constitutes and unexpected expense)
- Clients being told they are not eligible for income assistance, and interpret this to mean they are also ineligible disability assistance***
- Streamline Persons with Disabilities process – extremely difficult
- Ministry offices turning away clients who are requesting paper applications or disability applications
- Mental health clients are unable to navigate through system need specialized process and designated worker

- First contact should be friendly and helpful*
- Role of worker is unclear and what is happening with client information (i.e., who is making a decision versus who should just be passing along the information to a decision maker)
- Indigenous training for all front line staff and consider specialized worker for aboriginals
- Assistance/help for visually impaired available through phone service
- Regional Advocate calls, access to CRSO and District Supervisor works well and appreciate the level of service by some workers at the face to face offices***
- Need clarity on the role of Service BC (in some cases Service BC clerks provide wrong information which causes hardship for the client) as well as what is ministry office vs a Service BC office**
- Frontline staff need domestic violence training
- Ministry needs better understanding of rural restrictions (i.e., getting a bank statement can be very difficult as client needs to travel to another community to get it) this causes delays
- Ministry needs to accommodate different time zones within the province
- Workers need more training, as they are providing wrong information to clients

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)*
- Move to 1 800/1 866 – misdirected calls doesn't work*
- Must use phone i.e., some clients don't have phones and costs money on cell phones***
- Call centre across regions are not integrated
- Call wait times have improved

**Internet / Online Channel:**

- Difficulty applying
    - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online*****
    - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
    - No SIN card can't do online application too!
    - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
    - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
    - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online*****
    - Applicants – lose information, application freezes, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

- Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
- Online application– privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
- Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
- Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
  - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
  - When finishing the online application, clients are not sure when they are finished
- Online application - estimator tool is not always accurate as it doesn't take into account individual extenuating circumstances

- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call*
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents –some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
  - Documents going missing
  - Clients being asked to gather a lot of information prior to initial assessment of eligibility (i.e., in some cases client in clearly ineligible but still asked to gather information)
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office*
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call *
- Clients will go away, without receiving service, due to frustration
- Face-to-Face channel works well
- Face to face offices don't exist no more, only there to drop off papers

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call*
- Advocates being told (on phone) they would only deal with one client issue per call due to high call volumes (after waiting 20 minutes to get through)
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients
- Advocacy groups should be brought aware of policy changes that impact eligibility when they are introduced (i.e., fleeing abuse)
- Face-to-face offices channel is more familiar with dealing with advocates (much harder to establish the relationship over the phone). Losing the ability to do creative problem solving
- Where relationships developed (worker/advocate) works very well****

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions*******
- Reconsideration and Appeal
  - Information not in appeal record (since Phase 2 of ICM)
  - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
  - Wrong due date on packages
  - Reconsiderations packages – clients are waiting weeks to receive
  - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Workers are using the reconsideration process when they haven't explored all other options (i.e., phone call to Health Assistance Branch)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort
- Clients unclear on implication of certain policies on eligibility (i.e., child and spousal support)
- Women in transition house – ministry needs the policy to include fast tracked eligibility appointment and also not assume all needs are being met at the transition house (certain circumstances the transition house is not able to provide some needs (i.e., specialized baby formula)

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
    - Concerns regarding not requiring signature
    - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
    - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
    - Will this be clear if a person is applying online?
    - Find an office Icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?*
- Plain language – use grade 3 - 6 level (i.e., use simple language)*****
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)****
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies (i.e., can ministry outreach workers set up computers in community agencies and be there to assist clients with navigating) ***
- Need to ensure clients have opportunities to be trained by the ministry on how to use this**
- Online portal will require more advocate capacity and resources to assist the client to use**
- Ensure the portal will be an additional channel, and not replace current channels ***
- Portal is not for everybody (i.e., immigrants, language barriers, mental health issues, homeless, low literacy or low computer skills), these clients need face to face service (fear this will become mandatory just like the online application*******
- Determine what service delivery channel is best based on service request (i.e., barriers of a client are not visible online)
- Need to ensure ministry offices are equipped with computers and have staff available for clients to guide clients**
- Need to develop service standards for response times for questions/emails received through the portal
    - Does the question get directed to local office or network office?

  - Will there be a dedicated worker answering the questions or will all workers be receiving the questions?
- Will there be a cc option for any emails that are being sent to client (i.e., include advocate response)
- Will the forms need to be scanned? Will a client require a scanner?
- Can stubs be submitted?
- Ability to view the document and submission history
- Once implemented, ministry should consult on what is working and what isn't
- Will the portal be available publicly? Available to advocates?
- Portal may further marginalize clients who are already marginalized*
- Government putting money into computer systems instead of rates is problematic*
- Liability issues for advocates assisting clients
- Clients do not have access to scanner, printers etc
- Will work well for high functioning clients and advocates but not the majority of the ministry's clients********
- Consider turning into a mobile site
- Manage my account is a good feature
- This further limits face to face service (i.e.,, come to office for intent to Rent form and sent away to print online)
- Ministry is relying on communities to resource the online portal without providing funding. Libraries computer budget have been cut. Where will clients access?
- Run pilot in remote area to determine if it works (area with geographic barriers). Ensure the pilot does not include advocate help
- Potential for clients to be lost in cyberspace between portal and the online application
- Concern portal is a transfer of responsibility from ministry to community resources

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates (or liaison worker)******
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone *** | • Connected to ICM |
| • Access to Supervisor/CRSQ*** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs, clients ********* <br>• Long wait time***** | • Advocates/clients being told that worker will call back at certain time and it doesn't happen or being told to call back at a later time** <br>• Delays in profiling documents* |
| • Not fully accessible****** <br>o Long distance calling restrictions <br>o Free access, no privacy, time limits <br>o Some cell phones charge roaming*** <br>o Most clients have pay as you go cell phones, or cell phones are only receive text or incoming calls** <br>o Doesn't work if client doesn't have access to a phone**** <br>o Most communities in the north don't have pay phones <br>o Using advocate office to receive calls is problematic | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones ******* <br>• Call backs causes barriers (i.e., interpretation) <br>• Clients with language barriers need better accommodation (i.e., messages being left in English) |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ *** | • Workers hang up when unable to call back *** <br>• Clients miss call from ministry, the client tries to call back the number on call display, but the number doesn't take incoming calls <br>• Clients being told that we called you back, but client did not receive no call |
| • Phones used to undermine face to face <br>• No accountability on quality of service (provide a way to identify worker i.e., ID number) ********* <br>• Consistency in what the client is being told (client being told different answer for the same question each time they call)******** | • Workers need to take better notes on file (sometimes a casual question doesn't get recorded and ends up being crucial)** <br>• Call centre staff need to be trained on sensitivity* |
| • Clients having to tell their story multiple times**** | • Roles and responsibilities need to be clarified between call centres and offices (i.e., clients being directed to phones when they come to offices and vice versa)** <br>• Clients have concerns over who has access to their personal information <br>• Clients hesitant to use call centres (associate with |

| | |
|---|---|
| | negative experiences i.e., collections) |
| • Issues with direct phone line for advocates, what about the clients? | • Need option to speak with worker at any time (i.e., please press "0". Phone menu is overwhelming for some. |
| • Need ability to fax to person to ensure they receive it | • Workers should not have time limits of how long they should be on the call with clients |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1-866 for advocates ********** | • Release of Information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option ** | • More information for clients upfront at application** |
| • Let advocates know when the peak call times (or best time call) | • Putting in direct line (telephones) direct access phones in the office |
| • Consider scan and email option – ability to take picture and send email | • Designated workers |
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility (and physical space) for those in need of this channel (i.e., all language, literacy and disability needs)****
2. **Do not turn away clients – need better coordination of services across all channels***
3. **Staff it – adequate level of resources , skill set, self care and self-awareness as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)***<br>o Family Maintenance Worker appointments<br>o Interpretation*<br>o Outreach workers going to clients<br>o Aboriginal<br>o HIV | • Advocate can easily get an appointment when requested ** |
| • Advocates have access to ministry liaison either of phone or in person weekly (preset time) | • Excellent staff at ministry offices – some are way more helpful than others* |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response****** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service **********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources **<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications **<br>o Increase in training to enable better decision making and discretion (mainly new staff) |
| • Discretionary and accommodation training i.e., new staff******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public, and consider all time zones in BC *. |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province and worker)* |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office.<br>• Advocates waiting in line at face to face offices | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Intolerance taken too far (Third Party) – people get administered for every little thing* | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone *******<br>o Systemic issue |

| | |
|---|---|
| | ○ Lack of consistency in securing and working with an interpreter during intake |
| • Limited capacity for advocacy organizations<br>• Ensure referrals make sense (i.e., client referred to the appropriate advocacy group) | • Some clients feel attending an office as an adversarial process<br>• Environment cold and uninviting, * |
| • Need longer hours for drop in clients | • Workers not offering designated worker when needed (i.e., mental health issues)* |
| • Referring clients to advocacy group instead of taking the time to problem solve with the client* | • Need special systems for vulnerable population |
| • Growing immigration population, don't have workers with different language skills (Region 5)<br>• Need more access to translation services<br>• Sign language | • Need worker in the reception area to help clients with the online applications |
| • Clients don't understand the difference between ministry office and Service BC office | • More outreach for people in hospital/people physically unable to attend a office** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need–face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel*** | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |
| • Setting quality standards for service delivery and treating clients with respect | • |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand***
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them and better mechanism to identify and respond faster*****
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking****
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet****
3. **Improve the Online Resource search function and making clients more aware of the OLR**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working **********<br>• At the start of the online application, advise clients about all channel to apply for assistance and how to access them | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills<br>• Clients need to know how to follow up on their application if they don't have phone (include instruction on the online application towards the end of the application) |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if |

| | |
|---|---|
| problematic and leads to delays*** <br>• Employability questions not appropriate for online application and should be part of Work BC Centres***** | they aren't sure what is being asked and the help is missing or doesn't address their question** |
| • Online application is not asking the right questions for the application to determine a client's needs <br>• Remove repetitive questions | • Language (various) - the online application needs to be in multiple languages* |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours* |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is often not accurate and can discourage some clients that need support*** | • Online Resource -- can it better explain changes – i.e., differentiate between a correction (spelling) in the regulation vs. a substantive change |
| • Online applications being lost * | • Wait time between when the online application is submitted and eligibility interview is too long |
| • Triaging for clients at risk of becoming homeless or clients that are staying in shelters (as they can only stay for limited time)* | • Ministry should be providing support for clients not advocates* |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** * | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide)** |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it* | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/ level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e; find all related documents to a topic***** |
| • Use online application data to skip the employment questions -- will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)***** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) ****** | • Email supervisors too fast track requests***** |
| • Ministry worker attends advocacy organization to assist with applications ** | • Access to Mental Health worker and designated workers** |
| • Fax authorizations (bus pass) if known | • Opportunity to provide ministry feedback on what is working and what can be improved |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests****** | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)***** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |
| • Need | • Need direct line for different services |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)*** | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons<br>• Outreach workers need more time on site and back-up when away* |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass **<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | • Service Delivery Channel – Text Messaging |
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

## OTHER

***Opportunities/Recommendations to consult further with clients:***

- Paper survey or comment cards
- Survey – can be mailed with client cheques
- Focus groups - go to people where they are, i.e., "Our Place" and "Soup Kitchen"
- Continue/remain open to feedback
- Keep doing client focus groups (can use outreach workers to assist)
- Having other avenues to provide feedback without having to sit through a session
- More targeted approach (i.e., smaller communities, aboriginal)
- Frequent break and over several days
- Would be useful to come at this from a "needs assessment" point of view. What are the needs? Identify the needs first and then work on how to address collaboratively with advocates/client/staff
- Develop feedback loop at the offices i.e., suggestion box or over the phone, complaint officer
- Go to organization that provide services to our clients and seek feedback (i.e. local agencies)

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

LEGEND
Region 2/3 Session (Jan 8 2013)
Region 1 Session (Mar 6 2013)
Region 4 Session (Mar 14 2013)
Region 5 Session (Mar 21 2013)

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful*
- Channels and accommodation not available (available ministry resources vs. actual client need)*
  - Provincial interpretation and accommodation services not being offered despite policy****
  - Need more resources on the frontline*
  - Outreach is good when available *******
- Wait time for all channels are too long (i.e., waiting for Shelter response, client can end up losing housing)
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency regarding information provided to client (client getting different answer for the same request) and repeating story)*******
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic*
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
  - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
  - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge ****
- Release of Information/Consents – more efficiency needed
  - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., aboriginals, immigrants, refugees and certain segments of caseload)
  - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service*
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks*******
- Difficulty understanding the family bonus top up policy (i.e., new baby)
- Workers need to ensure they record all details of request and interaction history with client. If worker is unsure of what the client is asking, they should be asking clarifying questions and documenting everything***
- Difficulty accessing crisis supplements (what constitutes and unexpected expense)
- Clients being told they are not eligible for income assistance, and interpret this to mean they are also ineligible disability assistance**
- Streamline Persons with Disabilities process – extremely difficult
- Ministry offices turning away clients who are requesting paper applications or disability applications
- Mental health clients are unable to navigate through system need specialized process and designated worker
- First contact should be friendly and helpful

- Role of worker is unclear and what is happening with client information (i.e., who is making a decision versus who should just be passing along the information to a decision maker)
- Indigenous training for all front line staff and consider specialized worker for aboriginals
- Assistance/help for visually impaired available through phone service
- Clients being denied the disability package and being told they won't be eligible

**Telephone Channel:**

- Phone system – dropped calls and staff not available
  - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)*
- Move to 1 800/1 866 – misdirected calls doesn't work*
- Must use phone i.e., some clients don't have phones and costs money on cell phones***
- Call centre across regions are not integrated

**Internet / Online Channel:**

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application too!
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants – lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application– privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
    - When finishing the online application, clients are not sure when they are finished

  - Online application - estimator tool is not always accurate as it doesn't take into account individual extenuating circumstances
  - Online application is not suitable for all clients (i.e., people with physical disabilities)
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents –some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
  - Documents going missing
  - Clients being asked to gather a lot of information prior to initial assessment of eligibility (i.e., in some cases client in clearly ineligible but still asked to gather information)
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call *
- Clients will go away, without receiving service, due to frustration
- Face-to-Face channel works well

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy - not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call*
- Advocates being told (on phone) they would only deal with one client issue per call due to high call volumes (after waiting 20 minutes to get through)
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients
- Advocacy groups should be brought aware of policy changes that impact eligibility when they are introduced (i.e., fleeing abuse)

- Face-to-face offices channel is more familiar with dealing with advocates (much harder to establish the relationship over the phone). Losing the ability to do creative problem solving
- Where relationships developed (worker/advocate) works very well

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
  - Information not in appeal record (since Phase 2 of ICM)
  - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
  - Wrong due date on packages
  - Reconsiderations packages – clients are waiting weeks to receive
  - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Workers are using the reconsideration process when they haven't explored all other options (i.e., phone call to Health Assistance Branch)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort
- Clients unclear on implication of certain policies on eligibility (i.e., child and spousal support)
- Women in transition house – ministry needs the policy to include fast tracked eligibility appointment and also not assume all needs are being met at the transition house (certain circumstances the transition house is not able to provide some needs (i.e., specialized baby formula)

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
  - Concerns regarding not requiring signature
  - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
  - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
  - Will this be clear if a person is applying online?
  - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?*
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)*
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies (i.e., can ministry outreach workers set up computers in community agencies and be there to assist clients with navigating) *
- Need to ensure clients have opportunities to be trained by the ministry on how to use this*
- Online portal will require more advocate capacity and resources to assist the client to use
- Ensure the portal will be an additional channel, and not replace current channels **
- Portal is not for everybody (i.e., immigrants, language barriers, mental health issues, homeless, low literacy), these clients need face to face service*****
- Determine what service delivery channel is best based on service request (i.e., barriers of a client are not visible online)
- Need to ensure ministry offices are equipped with computers and have staff available for clients to guide clients*
- Need to develop service standards for response times for questions/emails received through the portal
- Will there be a cc option for any emails that are being sent to client (i.e., include advocate response)
- Will the forms need to be scanned? Will a client require a scanner?
- Can stubs be submitted?
- Ability to view the document and submission history
- Once implemented, ministry should consult on what is working and what isn't
- Will the portal be available publicly? Available to advocates?
- Portal may further marginalize clients who are already marginalized
- Government putting money into computer systems instead of rates is problematic*

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates (or liaison worker)***
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**
4. **Accountability on the quality of service provided**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone *** | • Connected to ICM |
| • Access to Supervisor/CRSQ*** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs, being told to call back ******** | • Long wait time<br>• Advocates/clients being told that worker will call back at certain time and it doesn't happen**<br>• Delays in profiling documents |
| • Not fully accessible****<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits<br>o Some cell phones charge roaming***<br>o Clients have pay as you go cell phones, and minutes on their cell phone run out prior to getting through to the ministry, or during the call. Clients do not have money to add more minutes | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones *******<br>• Call backs causes barriers (i.e., interpretation)<br>• Clients with language barriers need better accommodation (i.e., messages being left in English) |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service (provide a way to identify worker i.e., ID number) *********<br>• Consistency in what the client is being told (client being told different answer for the same question each time they call)***** | • Doesn't work if client doesn't have access to a phone***** |
| • Clients having to tell their story multiple times**** | • Roles and responsibilities need to be clarified between call centres and offices (i.e., clients being directed to phones when they come to offices and vice versa) |
| • Clients hesitant to use call centres (associate with negative experiences i.e., collections) | • Ministry needs to communicate that all workers have access to the same information*<br>• Clients have concerns over who has access to their personal information |
| • Workers need to take better notes on file (sometimes a casual question doesn't get recorded and ends up being crucial)** | • Need option to speak with worker at any time (i.e., please press "0". Phone menu is overwhelming for some. |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option ** | • More information for clients upfront at application** |
| • Let advocates know when the peak call times (or best time call) | • Putting in direct line (telephones) direct access phones in the office |
| • Consider scan and email option – ability to take picture and send email | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility (and physical space) for those in need of this channel (i.e., all language, literacy and disability needs)****
2. **Do not turn away clients – need better coordination of services across all channels***
3. **Staff it – adequate level of resources , skill set, self care and self-awareness as a priority focus**
4. **Outreach for people in hospital/people physically unable to attend a office**

*What's Working*

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)***<br>o Family Maintenance Worker appointments<br>o Interpretation*<br>o Outreach workers going to clients<br>o Aboriginal<br>o HIV | • Advocate can easily get an appointment when requested ** |
| • Advocates have access to ministry liaison either of phone or in person weekly (preset time) | • Relationship with advocate |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |
| • Excellent staff at ministry offices – som are way more helpful than others | • |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

***What's Not Working***

| | |
|---|---|
| • Turn away to another service ********** <br> o Coordination of service channels needed as there is a need to fit together ***** <br> o Staff themselves tell clients and advocates to come to office | • Resources ** <br> o Staff vs. caseload, and more integration needed <br> o Division of workers and reception – tell story more than once (lack of continuity) <br> o Feelings among advocates/community that this service is not available i.e., applications ** <br> o Increase in training to enable better decision making and discretion (mainly new staff) |
| • Discretionary and accommodation training i.e., new staff****** <br> o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues <br> o See guard holding door shut <br> o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications <br> o Customer service focus (varies across province and worker)* |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office <br> • Advocates waiting in line at face to face offices | • Issues with offices <br> o Children – strollers – no room/space <br> o Bathrooms not being provided |
| • Intolerance taken too far (Third Party) – people get administered for every little thing* | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone ******* <br> o Systemic issue <br> o Lack of consistency in securing and working with an interpreter during intake |
| • Limited capacity for advocacy organizations <br> • Ensure referrals make sense (i.e., client referred to the appropriate advocacy group) | • Some clients feel attending an office as an adversarial process <br> • Environment cold and uninviting |
| • Need longer hours for drop in clients | • Workers not offering designated worker when needed (i.e., mental health issues)* |
| • Referring clients to advocacy group instead of taking the time to problem solve with the client | • Need special systems |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need – face-to-face * <br> • Will then see who needs to be seen |
| • Identify "groups" to use face to face channel*** | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |
| • Setting quality standards for service delivery and treating clients with respect | • |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand***
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them and better mechanism to identify and respond faster****
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
   - **At the start of the online application, advise clients about all channel to apply for assistance and how to access them**
2. **Appointment booking****
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet***
3. **Improve the Online Resource search function and making clients more aware of the OLR**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |
| • | • |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ********** | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills<br>• Clients need to know how to follow up on their application if they don't have phone (include instruction on the online application towards the end of the application) |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if |

| | |
|---|---|
| problematic and leads to delays*<br>• Employability questions not appropriate for online application and should be part of Work BC Centres*** | they aren't sure what is being asked and the help is missing or doesn't address their question** |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages* |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours* |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is often not accurate and can discourage some clients that need support** | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in the regulation vs. a substantive change |
| • Online applications being lost * | • Wait time between when the online application is submitted and eligibility interview is too long |
| • Triaging for clients at risk of becoming homeless or clients that are staying in shelters (as they can only stay for limited time) | • Ministry should be providing support for clients not advocates |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** * | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide)* |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it* | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/ level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**
4. **Service Delivery Channel – Text Messaging**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) ***** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker and designated workers** |
| • Fax authorizations (bus pass) if known | • Opportunity to provide ministry feedback on what is working and what can be improved |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests****** | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)*** | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons<br>• Outreach workers need more time on site and back-up when away* |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass **<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |

| | |
|---|---|
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

## OTHER

***Opportunities/Recommendations to consult further with clients:***

- Paper survey or comment cards
- Survey – can be mailed with client cheques
- Focus groups - go to people where they are, i.e., "Our Place" and "Soup Kitchen"
- Continue/remain open to feedback
- Keep doing client focus groups (can use outreach workers to assist)
- Having other avenues to provide feedback without having to sit through a session
- More targeted approach (i.e., smaller communities, aboriginal)
- Frequent break and over several days
- Would be useful to come at this from a "needs assessment" point of view. What are the needs? Identify the needs first and then work on how to address collaboratively with advocates/client/staff
- Develop feedback loop at the offices i.e., suggestion box or over the phone, complaint officer

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

LEGEND
Region 2/3 Session (Jan 8 2013)
Region 1 Session (Mar 7 2013)
Region 4 Session (Mar 14 2013)
Region 5 Session (Mar 21 2013)

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful*
- Channels and accommodation not available (available ministry resources vs. actual client need)
  - Provincial interpretation and accommodation services not being offered despite policy
  - Need more resources on the frontline*
  - Outreach is good when available.*
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency regarding information provided to client (client getting different answer for the same request) and repeating story)***
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic*
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
  - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
  - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
  - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., aboriginals, immigrants, refugees and certain segments of caseload)
  - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks
- Wait times to get service
- Clients who get banned from ministry office and third party office, have no one else to facilitate access to ministry services
- Difficulty understanding the family bonus top up policy (i.e., new baby)
- Workers need to ensure they record all details of request and interaction history with client. If worker is unsure of what the client is asking, they should be asking clarifying questions
- Difficulty accessing crisis supplements (what constitutes and unexpected expense)
- Ministry response time effects clients negatively (i.e., waiting for Shelter response, client can end up losing housing)
- Clients being told they are not eligible for income assistance, and interpret this to mean they are also ineligible disability assistance
- Streamline Persons with Disabilities process – extremely difficult

- Ministry offices turning away clients who are requesting paper applications
- Mental health clients are unable to navigate through system
- First contact should be friendly and helpful
- Delayed supervisor contact
- Role of worker is unclear and what is happening with client information (i.e., who is making a decision versus who should just be passing along the information to a decision maker)
- Indigenous training for all front line staff
- Clients being denied disability application
- Assistance/help for visually impaired available through phone service

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)*
- Move to 1 800/1 866 – misdirected calls doesn't work*
- Must use phone i.e., some clients don't have phones and costs money on cell phones**
- Call centre across regions are not integrated
- Clients have pay as you go cell phones, and minutes on their cell phone run out prior to getting through to the ministry, or during the call. Clients do not have money to add more minutes
- Information provided to clients over the phone is often incorrect

**Internet / Online Channel:**

- Difficulty applying
    - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
    - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
    - No SIN card can't do online application tool
    - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
    - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
    - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
    - Applicants – lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
    - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
    - Online application– privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

- Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
- Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
  - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
  - When finishing the online application, clients are not sure when they are finished
- Online application - estimator tool is not always accurate as it doesn't take into account individual extenuating circumstances
- Online application is not suitable for all clients (i.e., people with physical disabilities)

- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents –some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
  - Documents going missing
  - Clients being asked to gather a lot of information prior to initial assessment of eligibility (i.e., in some cases client in clearly ineligible but still asked to gather information)
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call *
- Clients will go away, without receiving service, due to frustration
- Face-to-Face channel works well

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (integration two times a week, application on site and education)

- Advocates attending offices face-to-face being sent away to call
- Advocates being told (on phone) they would only deal with one client issue per call due to high call volumes (after waiting 20 minutes to get through)
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients
- Advocacy groups should be brought aware of policy changes that impact eligibility when they are introduced (i.e., fleeing abuse)
- Face-to-face offices become familiar with dealing with advocates (much harder to establish the relationship over the phone)
- Where relationships developed (worker/advocate) works very well

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
  - Information not in appeal record (since Phase 2 of ICM)
  - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
  - Wrong due date on packages
  - Reconsiderations packages – clients are waiting weeks to receive
  - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Workers are using the reconsideration process when they haven't explored all other options (i.e., phone call to Health Assistance Branch)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort
- Clients unclear on implication of certain policies on eligibility (i.e., child and spousal support)
- Women in transition house – ministry needs the policy to include fast tracked eligibility appointment and also not assume all needs are being met at the transition house (certain circumstances the transition house is not able to provide some needs (i.e., specialized baby formula)
- Clients being denied disability application

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
    - Concerns regarding not requiring signature
    - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
    - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
    - Will this be clear if a person is applying online?
    - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?*
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)*
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies (i.e., can ministry outreach workers set up computers in community agencies and be there to assist clients with navigating) *
- Need to ensure clients have opportunities to be trained by the ministry on how to use this*
- Online portal will require more advocate capacity and resources to assist the client to use
- Ensure the portal will be an additional channel, and not replace current channels
- Portal is not for everybody (i.e., immigrants, language barriers, mental health issues, homeless, low literacy), these clients need face to face service***
- Determine what service delivery channel is best based on service request (i.e., barriers of a client are not visible online)
- Need to ensure ministry offices are equipped with computers and have staff available for clients to guide clients
- Need to develop service standards for response times for questions/emails received through the portal
- Will there be a cc option for any emails that are being sent to client (i.e., include advocate response)
- Will the forms need to be scanned? Will a client require a scanner?
- Can stubs be submitted?

- Ability to view the document and submission history
- Once implemented, ministry should consult on what is working and what isn't

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates (or liaison worker)**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**
4. **Accountability on the quality of service provided**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone * | • Connected to ICM |
| • Access to Supervisor/CRSQ** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ****** | • Long wait time |
| • Not fully accessible***<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones ******<br>• Call backs causes barriers (i.e., interpretation)<br>• Clients with language barriers need better accommodation (i.e., messages being left in English) |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service********<br>• Consistency in what the client is being told (client being told different answer for the same question each time they call( | • Doesn't work if client doesn't have access to a phone* |
| • Clients having to tell their story multiple times* | • Roles and responsibilities need to be clarified between call centres and offices (i.e., clients being directed to phones when they come to offices and vice versa) |
| • Clients hesitant to use call centres (associate with negative experiences i.e., collections) | • Ministry needs to communicate that all workers have access to the same information*<br>• Clients have concerns over who has access to their personal information |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of Information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option * | • More information for clients upfront at application** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |

| | |
|---|---|
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient*. |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility (and physical space) for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources , skill set, self care as a priority focus**
4. **Outreach for people in hospital/people physically unable to attend a office**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)*<br>o Family Maintenance Worker appointments<br>o Interpretation*<br>o Outreach workers going to clients | • Advocate can easily get an appointment when requested ** |
| • Advocates have access to ministry liaison either of phone or in person weekly (preset time) | • Relationship with advocate |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources **<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province and worker)* |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office<br>• Advocates waiting in line at face to face offices | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone *******<br>o Systemic issue |

| | |
|---|---|
| | ○ Lack of consistency in securing and working with an interpreter during intake |
| • Limited capacity for advocacy organizations<br>• Ensure referrals make sense (i.e., client referred to the appropriate advocacy group) | • Some clients feel attending an office as an adversarial process<br>• Environment cold and uninviting |
| • Need longer hours for drop in clients | • Workers not offering designated worker when needed |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need– face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand***
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
   - **At the start of the online application, advise clients about all channel to apply for assistance and how to access them**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is | • Web Page - What web page? The ministry home page (internet) is not a place that clients or |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

| | |
|---|---|
| not working ********* | advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application – structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills<br>• Clients need to know how to follow up on their application if they don't have phone (include instruction on the online application towards the end of the application) |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays<br>• Employability questions not appropriate for online application and should be part of Work BC Centres** | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages* |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours* |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is often not accurate and can discourage some clients that need support* | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in the regulation vs. a substantive change |
| • Online applications being lost | • Wait time between when the online application is submitted and eligibility interview is too long |
| • Triaging for clients at risk of becoming homeless or clients that are staying in shelters (as they can only stay for limited time) | • |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/ level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment | • Improving search function/information on the |

| | |
|---|---|
| questions – will make the application more relevant and shorter | Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**
4. **Service Delivery Channel – Text Messaging**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |
| • Worker giving incorrect information about advocacy organization (i.e., phone number, name, what they do) | |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons<br>• Outreach workers need more time on site and back up |

| | |
|---|---|
| | when away* |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |

| | |
|---|---|
| • Ensure boundaries are clear between advocacy organization and ministry | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

## OTHER

***Opportunities/Recommendations to consult further with clients:***

- Paper survey or comment cards
- Survey – can be mailed with client cheques
- Focus groups - go to people where they are, i.e., "Our Place" and "Soup Kitchen"

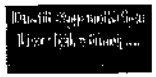
**From:** Bandechha, Pardip MSD:EX
**Sent:** Tuesday, February 26, 2013 8:51 AM
**To:** 'Lakes, Tish (OARS - Steering Committee Co-Chair)'
**Subject:** Upcoming Regional Advocate Consultaiton - Channel Strategy

Hi Tish

Hope you are well. Attached is the updated agenda for the live meeting calls for Region 1, 4 & 5 for your input. Please note that we are planning on sharing the notes from Region 2 & 3 session as a starting point. We are planning for Region 1 call on March 6th.

I am hoping we can have a quick conversation. Can you let me know when is a good time to call you.

Thanks
Pardip



Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

**This message is confidential and may not be disclosed to anyone without the express written consent of the sender**

**Evans Locker, Ann SDSI:EX**

**From:** Bandechha, Pardip MSD:EX
**Sent:** Thursday, February 28, 2013 1:56 PM
**To:** Kerr, Grant GCPE:EX
**Cc:** Archer, Terri MSD:EX; D'Gal, Judy MSD:EX
**Subject:** FW: Upcoming Regional Advocate Consultaiton - Channel Strategy

**Follow Up Flag:** Follow Up
**Flag Status:** Flagged

Hi Grant

As discussed on the phone, attached is the summary notes from the January 8th session and the draft agenda for the upcoming live meeting advocate consultation in the other regions (March 6 – Region 1 , March 14 – Region 4 and March 20 or 21 – Region5). We are hoping to send out the notes to the advocate participants in the Region 1, 4, 5 call, to use as a starting point of discussion. Please let me know if you have any concerns.

Sorry about the tight timelines. Also, let us know if you need any further information regarding the upcoming live meeting focus groups with advocates.

Thanks
Pardip

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

This message is confidential and may not be disclosed to anyone without the express written consent of the sender

**Evans Locker, Ann SDSI:EX**

**From:** Archer, Terri MSD:EX
**Sent:** Thursday, November 15, 2012 11:37 AM
**To:** Fahey, Kathy MSD:EX; Houston, Darcy L MSD:EX
**Subject:** FYI: Citizen Engagement Update

**Follow Up Flag:** Follow up
**Flag Status:** Flagged

Hello Kathy and Darcy, just a quick update on the Citizen Engagement website and requirement (see note to Judy below, she was fine with this).

It seems this is not a requirement, just a resource, so it should not impact approvals or anything. There is a lot of good information on the website that will be helpful as we plan our client engagement initiatives but no additional sign off required.

Cheers,

Terri

From: Archer, Terri MSD:EX Sent: Thursday, November 15, 2012 11:16 AM To: D'Gal, Judy MSD:EX
Subject: Citizen Engagement Update

Hi Judy, I just spoke to David Hume regarding Citizen Engagement and discussed that we are looking to connect with ministry clients in various ways likely including focus group sessions. He indicated that the Citizen Engagement site is intended as a resource and that it is not a required process.

They like to be kept in the loop on citizen engagement initiatives across government and are intended as the "knowledge hub" to share learnings and other resources with those interested in engaging stakeholders. He requested to be kept updated on our initiatives and offered to provide feedback at anytime. He noted an interesting strategy that we may want to consider and that's related to Client Experience as in, what does their day look like, (the challenges, access issues, etc) as they attempt to access our services. This individual research may be more labour intensive/time consuming but likely more telling than other methods of data collection. Something for us to think about anyway.

In a nutshell, I intend for us to review and utilize specific information on the Citizen Engagement website as we develop the detailed plans for our client engagement strategy and while I will update David and consult him as appropriate, no approvals are required from them.

I will update Kathy and Darcy but thought I'd update you first in case you had additional feedback on this.

Terri

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful
- Channels and accommodation not available (available ministry resources vs. actual client need)
    - Provincial interpretation and accommodation services not being offered despite policy
    - Need more resources on the frontline
    - Outreach is good when available
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency and repeating story)
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
    - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
    - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
    - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., immigrants, refugees and certain segments of caseload)
    - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)
- Move to 1 800/1 866 – misdirected calls doesn't work
- Must use phone i.e., some clients don't have phones, which is frustrating
- Call centre across regions are not integrated

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Internet / Online Channel:**

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application tool
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants – lose information, must start again, don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application– privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
    - When finishing the online application, clients are not sure when they are finished
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents –some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (In some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call
- Clients will go away, without receiving service, due to frustration

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Normal needs to be inclusive for vulnerable groups
    - Concerns regarding not requiring signature
    - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
    - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
    - Will this be clear if a person is applying online?
    - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies
- Need to ensure clients have opportunities to be trained by the ministry on how to use this

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone * | • Connected to ICM |
| • Access to Supervisor/CRSQ** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ***** | • Long wait time |
| • Not fully accessible***<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones **** |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service******* | • Doesn't work if client doesn't have access to a phone |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of Information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option * | • More information for clients upfront at application** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources, skill set, self care as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)<br>o Family Maintenance Worker appointments<br>o Interpretation | • Advocate can easily get an appointment when requested ** |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province) |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone ******<br>o Systemic issue |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need– face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand**
   - **Less words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ******** | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in |

| | |
|---|---|
| often not accurate and can discourage some clients that need support | the regulation vs. a substantive change |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/ level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent. |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

**DRAFT AGENDA - Live Meeting**

**Advocate Consultation Focus Group**

1. **Opening Remarks and Introductions** *(Terri)* ..... **9:00 – 9:25**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of the Region 2 & 3 consultation session*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25 – 9:55**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55 – 10:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine)* ..... **10:55 – 12:10**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other key/priority suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **12:10 – 12:30**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:30**

*** Intention is to share summary from Region 2 & 3 consultation and key messages with advocates prior (to be sent out with the agenda).*

Updated February 21, 2013

## DRAFT AGENDA - Live Meeting

## Advocate Consultation Focus Group

1. **Opening Remarks and Introductions** *(Terri)* ..... **9:00 – 9:25**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of the Region 2 & 3 consultation session*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25 – 9:55**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55 – 10:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine)* ..... **10:55 – 12:10**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other **key/priority** suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **12:10 – 12:30**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:30**

*** Intention is to share summary from Region 2 & 3 consultation and key messages with advocates prior (to be sent out with the agenda).*

Updated February 21, 2013

BRITISH COLUMBIA
The Best Place on Earth

# Ministry of Social Development

Stakeholder Engagement Plan

Channel Strategy

May 2012

## EXECUTIVE STEERING COMMITTEE APPROVALS

I have reviewed and approve this Stakeholder Engagement Plan, as submitted by Pardip Bandechha and Darcy Mann, Regional Operations Branch:

| Executive Steering Committee: | Title: | Signature: | Date: |
|---|---|---|---|
| Lynne Boule | Director,<br>Region 3, Fraser Region | | |
| Judy D'Gal | Director<br>Regional Operations | | |
| Janice Nakamura | Executive Director<br>Regional Operations | | |
| Sharon Moysey | Assistant Deputy Minister<br>Regional Services Division | | |
| Susan Mader | Communications Director<br>BCPE | | |
| Mark Sieben | Deputy Minister | | |

## EXECUTIVE SUMMARY

Regional Services Division (RSD) is developing a Channel Strategy to enhance service delivery. A Stakeholder Engagement Plan is a deliverable within the Channel Strategy.

Objectives of this Stakeholder Engagement Plan are to:

- Obtain information and feedback to inform effective development of the Channel Strategy
- Determine and monitor client satisfaction on an ongoing basis
- Identify service delivery efficiencies to enhance client satisfaction

Clients currently contact the ministry through a myriad of channels (telephone, online application tool, face-to-face, mail, fax, and some email). A number of service delivery pressures exist, which include: long telephone wait times, especially during peak times; a significant proportion of telephone calls dropped resulting in repeat client follow-ups; and long line ups at offices; and, delays in responsiveness to client requests. The ministry has recently introduced service delivery changes intended to streamline processes to reduce these pressures and better serve clients over the long term.

RSD currently uses a number of tools/processes to monitor the quality of service clients are receiving, including: formal client complaint and decision review processes, data collection and monitoring and formal processes for ongoing dialogue with stakeholder groups:

To date, it has been rare for the ministry to dialogue directly with clients to determine their preferences and level of satisfaction. There is now significant national and provincial effort being directed towards client satisfaction initiatives. The Citizens First initiative uses a common survey instrument to measure and monitor client satisfaction across sectors and levels of government. The Ministry of Labour, Citizens' Services and Open Government is fostering corporate excellence in user-centred design research as part of the changing face of the BC government online.

RSD is interested in engaging in dialogue with clients (primarily) supported by enhanced engagement with advocacy organizations and staff. Through this Stakeholder Engagement Plan, RSD will initiate a primary consultation process to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel.

| | CLIENTS/ADVOCACY ORGANIZATIONS | STAFF |
|---|---|---|
| CHANNEL DEVELOPMENT - CONSULTATION | Obtain information and feedback that will inform effective channel development and distribution | *(A separate, broader, staff engagement initiative related to the Channel Strategy is under development)* |
| SATISFACTION | Identify and monitor (on an ongoing basis) client satisfaction with service delivery | Development and implementation of initiatives to support enhanced client satisfaction. This may include opportunities to enhance efficiency through "Lean" initiatives. |

The focus of these initiatives is on initiating a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels. With the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design.

The action plan will consider short, medium and long term initiatives, for channel development and ongong client satisfaction. Target audiences will be advocacy organizations, clients and staff.

*Channel Development Consultation:*

- Advocacy Organizations: focus groups will used to obtain input and advice on client consultation, as well as perceptions around client needs and supports. Dialogue will be enhanced over time, with more robust feedback loops.
- Clients: building on existing data (ICM and hours of work pilot data collection) focus groups and/or interviews will be held to identify client needs, preferences and support requirements to access channels. In the longer term, client focus groups will provide feedback on prototype development of channel functionality.
- Staff: as part of a broader staff engagement initiative related to the Channel Strategy, staff will be engaged to provide input on channel development and evaluation.

*Satisfaction:*

- Advocacy organizations: focus groups and enhanced dialogue to help identify client issues.
- Clients: Comment cards, evaluation of results and development of broader plans to gauge client satisfaction. In the longer term, surveys available on the website, and exploring social media options independently administered, stratified random sample Citizens First surveys.
- Staff: dialogue and development and implementation of action plans to enhance satisfaction.

## BACKGROUND

*History of Service Delivery*

In 2002, employment and assistance services in British Columbia were delivered via community offices serving specific catchment areas. The first ministry contact centre (also the first income assistance contact centre in Canada) opened in 2002 to deliver services over the phone. The contact centre was a precursor to the "caseless" model of delivering ministry services.

In 2010, the online Self-Serve Assessment and Application Tool (SSAA) was launched to provide British Columbians with an online self-service option for contacting the ministry. This web-based tool provides citizens with: 24/7 access to general program information; the ability to estimate the amount of income assistance for which they may be eligible; and the ability to submit their application for income assistance online. Use of the SSAA as a new service channel (as the first method of contacting the ministry) has increased steadily. Approximately 72,000 applications are processed annually via the web through the ministry's SSAA.

*Our Service Delivery Focus*

The ministry provides services to a variety of client categories, each with their own unique level of supports: Expected-to-Work; Expected-to-Work – Medical Condition; Temporarily Excused; Persons with Persistent Multiple Barriers; and Persons with Disabilities. The Temporarily Excused category includes single parents with children under the age of three.

BC Employment Assistance Caseload (as at March 2012):

| Region | Expected to Work | Expected to Work - Medical Condition | Excused from Work | Persistent Multiple Barriers | Persons with Disability | Total Cases |
|---|---|---|---|---|---|---|
| Region 1 | 6,576 | 952 | 1,139 | 1,128 | 17, 747 | 27,542 |
| Region 2 | 6,645 | 1,160 | 829 | 2,413 | 19,044 | 30,091 |
| Region 3 | 10,291 | 2,536 | 2,629 | 2,701 | 24,509 | 42,666 |
| Region 4 | 7,031 | 882 | 1,307 | 1,416 | 16,657 | 27,293 |
| Region 5 | 2,995 | 125 | 600 | 396 | 4,357 | 8,473 |
| Total | 33,538 | 5,655 | 6,504 | 8,054 | 82,314 | 136,065 |

*Source: MARS*

*Service Delivery As We Now Know It*

The ministry is committed to providing quality service delivery and is continually working to improve the way our clients receive services. The ministry currently provides a variety of options to citizens to access information, assistance and services. These channels and services provided by ministry staff include:

- Internet/Online – in March 2010, the Self Serve Assessment and Application Tool, as well as accessible information on policies, procedures, programs and services, was launched by the ministry
- Telephone – contact centre access is provided through a toll-free Automated Telephone Inquiry system with live agents who handle 1.5 million calls per year (2011). After hours, the system provides pre-recorded information about ministry programs and services
- Face-to-Face – 61 ministry offices and, in partnership with the ministry, 29 Service BC offices located around the province, offer front desk services during regular business hours
- Mail, fax and e-mail requests – ministry staff respond, generally either in-person, by telephone or mail, to client requests for information and services
- After Hours unit provides access for urgent needs
- Outreach and integration services provided by specialised staff
- Trusted third party partners

In 2011, the ministry processed 77,494 applications; approximately 84 per cent of which were submitted through the Self Serve Assessment and Application online channel; 11 per cent through face-to-face service; and five per cent by telephone. It is important to note that some transactions require contact through more than one channel.

In April 2012, the ministry implemented Phase 2 of the Integrated Case Management system (Phase 1 was implemented November 2010). Each phase is designed to implement a section of the overall solution to modernize technology and transformation and foster a more client-centred service delivery system to support better outcomes for clients. With modernized technology, the ministry's goal is to improve the overall service experience for clients and citizens through various existing service channels and potential new channels.

*What are our Service Delivery Challenges?*

A number of service delivery pressures exist, including: long telephone wait times, especially during peak times, a significant proportion of telephone calls dropped resulting in repeat client follow-ups and long line ups at offices; and, delays in responsiveness to client requests.

**Telephone Services**

- There are approximately 120,000 calls per month through the ministry's 1-866 number. Due to high demand, wait times for callers using the telephone service channel can be lengthy and vary by location across the province.
- Callers have reported experiencing difficulty accessing telephone services possibly as a result of the popularity of this channel. In addition, many callers make repeat client follow-ups through this channel, which increases call volumes.

**Face-to-Face Services**

- The ministry's face-to-face offices can experience line-ups, particularly around monthly cheque issue days. Offices use triaging processes to manage line-ups and identify those clients that can be assisted quickly without need for more intensive contact with staff (i.e., drop off of forms).
- Throughout 2011, some offices experienced resourcing challenges as staff left their front-line positions to pursue promotional opportunities, many within government. With significant hiring initiatives over the past two years, training and retention of staff have been a key RSD priorities and will continue to be an area of focus.

**Internet/Online Application Services**

- With approximately 72,000 applications now processed annually through the ministry's SSAA via the web, the popularity of the online service channel has resulted in shifting of RSD resources in order to be responsive to these volumes.

**Increased Number of Service Requests**

- Overall, the ministry has continued to experience an increased demand for its services as a result of the economic downturn. While the ministry closely monitors caseload and labour market trends and has recently introduced the new Employment Program of BC (April 2012), there continues to be significant demands for service which have, in some cases, resulted in delays in providing services.

In April 2012, RSD introduced a number of coordinated changes to hours of contact for both telephone and face-to-face services (i.e., introducing noon hour closures in face-to-face offices as

of end of May 2012, supported by continued access to telephone services during the noon hour). By introducing these trial changes, the goal is to streamline processes and provide better overall service to clients over the long term.

The changes are intended to provide staff more time to address client issues, perform follow-ups prior to appointments with clients to confirm documentation requirements, review employment plans and process applications. Over time, these changes are expected to result in issues being resolved more quickly, reducing the current number of repeat client follow-ups, both face-to-face and by telephone, resulting in improved overall service level capacity and reduced client wait times. The ministry is closely monitoring the effectiveness of these service delivery changes and will make appropriate adjustments as required.

## SERVICE DELIVERY – WHAT'S NEXT?

It is timely to consider ways to transform service delivery through the development of a service delivery Channel Strategy.

Currently, services are provided through a number of channels. While it is important to understand which channels are most appropriate for specific types of business transactions, it is also important to recognize that clients use multiple channels. Clients want to choose their channel for the services they receive. Given that the various channels work together as a 'system', changes in one channel will impact the other channels. Our strategies must balance the needs of the clients with the conflicting need to achieve efficiencies and become more effective in the delivery of ministry services.

Corporate direction has been to identify opportunities to reduce /reallocate the facilities footprint, with initiatives that include: Leading Workforce Strategies; Service Location Strategy (tier 2 use Service BC offices); and integrated counters. The Channel Strategy envisions a technology-enabled, integrated contact system for telephone and web application services to complement existing and future channels.

**Channel Strategy Goals:**

1. Broadened client access to services through multi-channel service delivery.
2. Maximize efficiency.
3. Integrate with government priorities and channels.
4. Continuous improvement to ensure effectiveness and to consider future technological advances.

By developing a Channel Strategy the ministry lays a foundation for making future service delivery channel decisions and creates opportunities to seek information and feedback from our clients, advocacy organizations and staff. Engaging in broader dialogue to determine our service delivery effectiveness and identify opportunities will help to legitimize future service delivery decisions and better prepare our clients, advocacy organizations and staff for changes in the delivery of services.

## HOW DO WE MONITOR SERVICE DELIVERY EFFECTIVENESS?

Within RSD, a number of tools/processes are already being used to monitor the quality of service clients are receiving.

**Formal client complaint and decision review processes:**

- Service Commitment – Complaints Resolution Process (see Appendix A)
- Reconsideration process
- Appeal process

Community Relations and Service Quality Managers within each region monitor local and regional service quality issues, including complaints and incidents, and identify trends and training needs. Issues of a provincial/systemic nature are monitored through Regional Operations Branch and the ADM's Office. The ministry also tracks the number of reconsideration and appeals initiated by clients, including the types of decisions for which clients seek review and the timeliness of providing clients the outcomes of their request for review.

**Data collection and monitoring:**

- Establishing and monitoring service standards through the Balanced Scorecard
- Monitoring Telephony statistics
- Monitoring service requests and incidents through the Integrated Case Management system (recent technological enhancements)

- Monitoring external review processes and public sentiments, which include but are not limited to: investigations and reports from the BC Ombudsperson, Representative for Children and Youth, Auditor General; MLA and media queries and reporting

RSD's Balanced Scorecard provides data on the number of services provided by the ministry (note: data flow has been impacted by the implementation of Phase 2 of Integrated Case Management system). The telephony dashboard provides data on the number of calls received, average wait time per call, percentage of abandoned calls, and time to handle calls. The Integrated Case Management enhancements introduced in April 2012 will provide new opportunities within RSD for enhanced reporting/monitoring of client service requests and incidents: Integrated Case Management reporting functions will begin production in July 2012.

More broadly, the ministry also regularly monitors external review processes and public reports, and is responsive to formal recommendations (i.e., implementation of March 2009 Ombudsperson Report recommendations).

**Formal processes for ongoing dialogue with stakeholder groups:**

- Liaison with advocacy organizations, community partners/agencies and external groups at the local, regional and provincial (i.e., Moving Forward Steering Committee) levels

The ministry is committed to ongoing dialogue with its external stakeholders, and has maintained a robust network of provincial and regional meetings (since 2007) and regular communications. These external stakeholders provide a valuable source of feedback and information sharing about the effectiveness of ministry policies, programs and services for clients, and provide a forum for prioritizing and resolving issues of common concern. In addition, RSD's Community Relations and Service Quality Managers have developed good working relationships with external stakeholders that have resulted in timely resolution of local and regional issues.

To date, it has been rare for the ministry to dialogue directly with clients to determine their preferences and level of satisfaction. Some ministry offices have introduced the use of suggestion boxes to gather feedback from clients. And recently, as part of the Employment and Labour Market Services Division Business Transformation, wide-ranging consultations were held over the course of 18 months with service providers, clients, advocates and others to seek information/feedback in the development of the new Employment Program of BC.

The ministry also recently completed a cross-jurisdictional scan of social and employment programs to assess other approaches to client engagement. Highlights (as of 2011) included:

- Interactive websites with options for clients to provide feedback via feedback form, survey or by a topical survey
- Internet-based tools to enable online discussion, including discussion forums, and user opinion submissions
- Phone surveys
- Community events
- Provincial hotline for client feedback

There is now significant national and provincial effort being directed towards client satisfaction initiatives. The Citizens First initiative uses a common question bank for surveys to measure and monitor client satisfaction across sectors and levels of government. Citizens First provincial data provides baseline information on how citizens view the provision of public services in British Columbia. The Ministry of Labour, Citizens' Services and Open Government is fostering corporate excellence in user-centred design research as part of the changing face of the BC government online. Corporate best practices encourage user-centred design research and testing to ensure new user and business design is informed by user insights and experiences.

RSD is interested in engaging in dialogue with clients (primarily), supported by enhanced engagement with advocacy organizations and staff.

## HOW DO WE MOVE FORWARD?

For the purposes of this Stakeholder Engagement Plan, "Satisfaction" and "Consultation" are defined as follows:

**Client Satisfaction** – *The client's perception that the service provider's performance either exceeds his or her expectations.*

**Client Consultation** – *In the context of improving client service, consultations are processes that build relationships, increase the level of information between clients and service providers, and improve the government's ability to meet client needs.*

Client consultation is linked to the measurement of client satisfaction.

The ministry must identify the gaps between what clients expect or need from the organization and the service they are actually receiving, for example:

| | CLIENTS/ADVOCACY ORGANIZATIONS | STAFF |
|---|---|---|
| CHANNEL DEVELOPMENT - CONSULTATION | • Inform the decision-making framework<br>• Ability to use different channels and access supports needed | • *(Help develop the channels – scope, functionality, etc)* |
| SATISFACTION | • How are we doing? | • Recommend ways we can enhance client satisfaction with service delivery |

To identify these gaps, RSD will initiate a primary consultation process to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel. With the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design.

Important considerations in developing a Stakeholder Engagement Plan include:

- Determining what we need to know vs. want to know. For example:
  - Client satisfaction levels with specific service delivery channels
  - Client satisfaction levels with specific types of services
  - Client satisfaction by client types
  - What caused a client to use a specific channel
  - What would encourage a client to use a different channel
  - What supports would a client need to use a different channel
  - Determine which clients we want to sample
  - Determine what information can be pre-determined vs. what information must be collected from the client
- Determining which data collection(s) will be ongoing (e.g., client satisfaction survey) vs. one-time or periodic (e.g., focus groups)

- Determining best delivery methodology based on needs, budget (the options recommended may need refining based on the type of information the data collection is intended to obtain)

The recommended initiatives below are informed by research methodologies, analysis and considerations/assumptions (See Appendix B) that would most effectively obtain the desired results for consultation to support channel development and monitoring client satisfaction.

Proposed outcomes:

| | CLIENTS/ADVOCACY ORGANIZATIONS | STAFF |
|---|---|---|
| CHANNEL DEVELOPMENT - CONSULTATION | Obtain information and feedback that will inform effective channel development and distribution | *(A separate, broader, staff engagement initiative related to the Channel Strategy is under development)* |
| SATISFACTION | Identify and monitor (on an ongoing basis) client satisfaction with service delivery | Development and implementation of initiatives to support enhanced client satisfaction. This may include opportunities to enhance efficiency through "Lean" initiatives. |

To achieve these outcomes, the Stakeholder Engagement Plan recommends the following initiatives:

The action plan will consider short, medium and long term initiatives, for channel development and ongoing client satisfaction. Target audiences will be advocacy organizations, clients and staff.

| | **Target Group** | **Short Term Strategy (fall)** | **Medium Term Strategy (FY end)** | **Longer Term and Ongoing Strategy (beginning in FY)** |
|---|---|---|---|---|
| CHANNEL DEVELOPMENT - CONSULTATION | Advocacy Organizations | • Focus group(s) | • Enhance ongoing dialogue processes | • Enhance feedback loops |
| | Clients | • Focus group(s) /interviews (to identify client needs, preferences | • Identify focus areas for further channel development consultations | • Identify opportunities to obtain information/ feedback on prototype |

| | | | | |
|---|---|---|---|---|
| | | and support requirements to access channels) | | development of channel functionality<br>• Enhance feedback loops |
| SATISFACTION | Advocacy Organizations | • Focus group(s) | • Enhance ongoing dialogue processes | • Enhance feedback loops |
| | Clients | • Comment cards (i.e., "How did we do today?" at each interaction) | • Evaluation of results and development of broader plans to gauge client satisfaction | • Surveys available on the website<br>• Exploring social media options<br>• Independently administered, stratified random sample Citizens First surveys. |
| | Staff | • Focus group(s) | • Enhance ongoing dialogue processes | • Development and implementation of action plans to enhance client satisfaction, including opportunities to participate in "Lean" initiatives to streamline service delivery |

The focus of these initiatives is on launching a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels. Through this proposed Stakeholder Engagement Plan, RSD envisions receiving the following information/feedback from our clients, advocacy organizations and staff:

Advocacy Organizations

- Advice regarding client consultation and information collection in an environment perceived to be "safe" and non-threatening
- Perceptions regarding client needs, expectations, capacity
- Perception regarding client satisfaction issues

Clients

- Obtain client satisfaction ratings and user insights on different aspects of different channels, and use that information to enhance the quality of our service.
- Understand the preferences, needs and decision-making criteria for client groups.
- Clarify opportunities for self serve, barriers to access, and types of support needed.
- Obtain feedback on prototype development of channel functionality.
- Determine opportunities for appointment-only face-to-face service access.
- Identify support required for additional channels.
- Analyze and determine service delivery processes that are best suited, both for efficiency and effectiveness, to each type of channel.
- Gain an understanding of what our clients' needs are for service channels.

Staff

- Obtain recommendations about opportunities for RSD to enhance service delivery.
- Introduce and develop staff awareness about the Channel Strategy (at all levels).
- Identify and address issues, barriers and fears (change management).
- Develop mechanisms to keep the dialogue alive among front line staff.
- Engage with staff and provide opportunities to participate in analysis and development, including participation with "Lean" initiatives to streamline service delivery and reflecting feedback from client satisfaction initiatives.
- Build support for and engagement with future channel strategies.

## DRAFT DELIVERABLES AND TIMING

The proposed initiatives and delivery dates, subject to approvals and access to resources, are listed below.

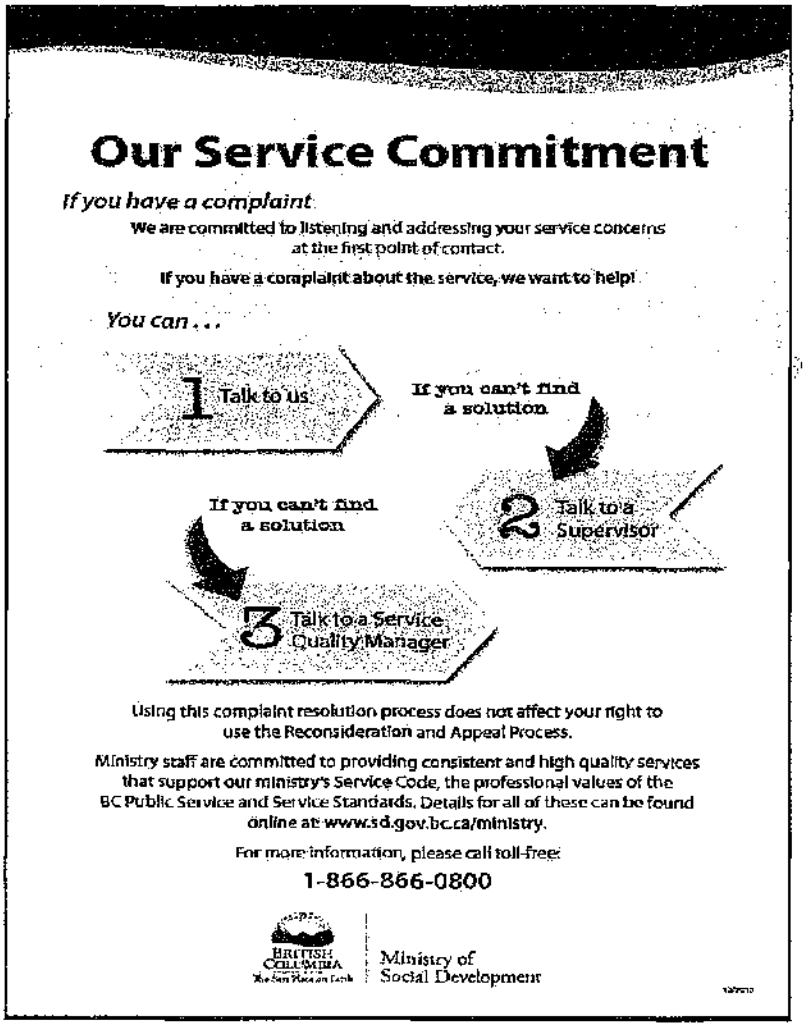
| Date | Deliverable | Audience | Responsibility | Status |
|---|---|---|---|---|
| May 14 | ADM Bilateral | RSD ADM | Janice Nakamura<br>Judy D'Gal | Complete |
| May 16/17 | Oversight | RSD Executive Directors | Janice Nakamura | Complete |
| May 22 | DM Briefing | Deputy Minister | Sharon Moysey<br>Janice Nakamura | Scheduling IP |
| May 25/28 | Minister Briefing | Minister | Sharon Moysey<br>Janice Nakamura | Scheduling IP |
| June 11 | Assign project resources | | Darcy/Pardip | NS |
| July | Planning for comment cards | | Darcy/Pardip/ /PRD/ Erin Buchholz | NS |
| July/August | Planning for focus groups/interviews | | Darcy/Pardip | NS |
| Through FY | Enhancing ongoing dialogue processes – Advocacy Organizations | | Judy | NS |
| Through FY | Enhancing ongoing dialogue processes – Staff | | Raymond Fjeltsch/Lynne Boule | NS |
| September through | Identify focus areas for further channel | | Darcy/Pardip | NS |

| | | | |
|---|---|---|---|
| December | development consultations | | |
| September through December | Identify baseline for monitoring client satisfaction with service delivery | Darcy/Pardip | NS |
| September through March | Develop client survey and identify service delivery feedback loops (clients/staff) | Darcy/Pardip/ /PRD/ Erin Buchholz | NS |
| September through March | Identify opportunities for staff participation in "Lean" initiatives | Raymond Fieltsch/Lynne Boule | NS |

IP = In Progress; NS = Not Started (pending Executive Steering Committee approvals)

## APPENDIX A

SERVICE COMMITMENT – COMPLAINTS RESOLUTION PROCESS



# Our Service Commitment

*If you have a complaint*

We are committed to listening and addressing your service concerns at the first point of contact.

If you have a complaint about the service, we want to help!

*You can . . .*

1 Talk to us

If you can't find a solution

2 Talk to a Supervisor

If you can't find a solution

3 Talk to a Service Quality Manager

Using this complaint resolution process does not affect your right to use the Reconsideration and Appeal Process.

Ministry staff are committed to providing consistent and high quality services that support our ministry's Service Code, the professional values of the BC Public Service and Service Standards. Details for all of these can be found online at www.sd.gov.bc.ca/ministry.

For more information, please call toll-free:

1-866-866-0800

BRITISH COLUMBIA | Ministry of Social Development

## APPENDIX B

RESEARCH METHODOLOGIES AND ANALYSIS

### Common Elements

Some elements are common to any type of data collection. This section details considerations that apply to both channel development consultation and client satisfaction measurement.

*Strategies for Data Collection*

- First step in any data collection is to pinpoint the essential and optional data needs, i.e., what do we need to know, and what would be nice to know? For example:
  - Client satisfaction with different types of services, possibly by client type?
  - Areas where clients have service issues or unmet expectations?
  - Staff perceptions of client service delivery?
  - Client and staff suggestions for improvement?
- One option is to run surveys first to determine which areas require improvement, then run focus groups / discussion boards / etc. to collect possible improvement ideas.
- Another alternative is to run focus groups first to determine which questions to ask in surveys – what do we need to know? (Might not be a significant factor for client satisfaction, if using Common Measurement Tool questions).
- Consider which questions may trigger clients to choose not to respond to a survey.
- Start with the easy-to-implement option(s), then expand data collection to include easy-to-administer options that provide ongoing data sources.
- Develop a working group that will refine the task: what do we need to know? This will feed in to the type of data collection, the questions asked, etc..
- For client and advocacy organization consultations, need to determine barriers and supports clients need to access different service delivery channels, and where there are gaps in service or in their ability to access service.
- For staff consultations, need to solicit feedback on what actions the ministry can take to improve services.

**Client Consultation**

*Types of Data Collection*

There are several types of data and/or data collection that may be useful for this Stakeholder Engagement Plan.

- Existing metrics, e.g., percentage of time service delivery standards are met, numbers of complaints, numbers of requests for reconsideration or appeal, etc.:
  - Useful to determine existing trends, including trends over time.
  - May help identify gaps in existing metrics that could be filled by this project.
  - If metrics are maintained on types of complaints, may help identify gaps in currently available services.
  - Need to determine what type of information is currently available, and the impact of Integrated Case Management Phase 2 implementation on previously available metrics.
  - Need to determine consistency of information from complaints to ensure measurements are equitable across all areas.
- Focus groups, e.g., of clients or advocacy organizations:
  - May be grouped by client type or by type of service delivered.
  - Useful for gathering feedback, e.g., what works, what doesn't work, suggestions for improvement.
  - Participants may be biased toward those with strong opinions (+ or -).
  - Need strong facilitators to prevent extroverts from dominating focus groups.

*Resources for Data Collection*

- Personnel, both contract and in-house staff.
  - The ministry has previously used both contractors and in-house personnel to conduct focus groups (e.g., Stratecore Solutions).

*Client Consultation Options*

- If consultation is required to inform survey questions, hold focus groups for clients and/or advocacy organizations to discuss specific issues, gather further feedback and insights, and for testing purposes e.g., to refine survey response options around why a client would or would not use a specific service delivery channel, including the development of new channels.
- If consultation is required to expand on survey results, hold focus groups for clients and/or advocacy organizations to discuss specific issues and gather further feedback.

**Staff Consultation**

*Types of Data Collection*

Types of data collection for staff are likely different than those used for clients.

- Existing venues, e.g., ADM Chatline or other existing avenues for feedback including blogs and discussion boards / Sharepoint:
  - May provide useful feedback on ideas for improvement, etc..
  - May be less likely to discuss problems and issues without anonymity.
- New discussion forums, e.g., Live Meeting or online discussions:
  - Live Meetings could be organized around specific topics.
  - Staff discussion forum could be set up on an internal website, with separate discussion threads for each topic – if site allows anonymous postings, feedback is likely to be more candid.
- Focus groups, e.g., of staff delivering different types of services, or in different areas:
  - Staff in rural areas may have different issues or ideas than staff in urban areas.
  - Staff administering the bus pass program may have different issues or ideas than staff issuing crisis grants.
  - Requires staff time commitment, but allows ideas to build collaboration.
  - More difficult to conduct remotely, e.g., to allow distance participation.
  - Allows more in-depth exploration of topics, e.g., improvement ideas.
- Online survey, e.g., of staff experiences with different processes, requesting ideas for improvement, or other input.
  - Can send link via email to random sample or entire population of staff.
  - Could do ongoing short surveys on the front page of the Loop, different topic each month, with report-out section on any results from surveys.

*Staff Consultation Options*

- If consultation is required to inform survey questions or discussion topics, hold focus group(s) for staff to discuss specific issues and gather further feedback.
- Develop an online staff survey (or series of surveys), and promote as follows:
  - Survey linked from the front page of the Loop.
  - Email to all (or selected) staff requesting survey completion.
  - Results of initial survey(s) (which provide baseline data) prominently posted on the Loop for staff to review.
  - Follow-up survey(s) posted on the Loop, with email requesting completion, and results posted on the Loop.
- Establish an anonymous discussion forum, to encourage candid feedback:

- Link to discussion forum from the Loop (near survey?).
- Have a site moderator review and remove any objectionable content.
- Establish parameters for discussion, e.g., in-scope, out-of-scope.
- Should be able to set up using in-house resources.

- If additional information/discussion is required, conduct focus group(s):
  - Use focus groups to refine ideas generated from survey, discussion forum.

**Client Satisfaction**

*Types of Data Collection*

There are several types of data and/or data collection that may be useful for this Stakeholder Engagement Plan.

- Surveys, e.g., of client satisfaction with a particular service delivery channel:
  - Useful for quantifying data, e.g., satisfaction levels.
  - Supplement existing metrics.
  - Can be used to gather feedback using open-ended questions, but analysis is time consuming vs. questions where response options are provided.
  - Response rates may be a factor – may need to test response rates for different survey administration options.
  - Question wording is key, both to avoid raising expectations for change, and to ensure respondent understanding is consistent and accurate (clear questions/plain language is critical).
- Ongoing "how are we doing" questions.

*Types of Surveys*

- Online surveys are anonymous, available 24/7, and are self-administered.
  - No interviewer bias, survey administration is consistent for all respondents.
  - Response rates may be an issue for certain service delivery channels, or for groups with limited online access.
  - Anonymity of online survey likely to produce most candid responses.
  - Timing is at respondent's convenience.
  - Can be used to measure trends over time.
  - There are multiple methods of distributing online surveys to respondents:
    - email the survey itself, or link to the survey, to respondent group.
    - embed link to the survey in online tool – embedding the survey itself in the existing SSAA tool is not recommended, as this would be cost prohibitive and limits ability to update survey questions.
    - provide the survey/link to the survey on ministry website.

  - provide the survey/link to the survey in service delivery kiosks.
  - provide the link to the survey by letter or in a cheque stuffer.
  - poster in waiting room inviting responses.
- Mail-out surveys are anonymous, less costly (vs. telephone), but tend to have lower response rates and require data entry for returned surveys.
  - Not effective with highly mobile, transient or homeless clients.
- Telephone surveys have higher response rates (vs. mail-out), but higher costs:
  - Able to probe to ensure understanding, or ask for details re: responses.
  - More likely to get complete, properly answered surveys.
  - Less candid than online surveys, but better than in-person, especially if administered by an independent third party (i.e., contracted out).
  - If in-house, need to ensure survey is administered consistently, and that responses are recorded exactly.
  - Prepaid cell service may cost clients to complete telephone surveys.
- In-person surveys may have high response rates, but require staff time to administer and record responses.
  - Respondents may not provide candid feedback about service, unless service delivery personnel and survey personnel are completely separate.
  - If in-house, need to ensure survey is administered consistently, and that responses are recorded exactly.

Table 1: Benefits by Survey Type:

| Benefit \ Type | Online | Mail-out | Telephone | In-person |
|---|---|---|---|---|
| Costs | Lowest | Higher | Higher | Highest |
| Response rate | Depends on channel | Lower | Higher | Unknown |
| Candid responses | Yes | Yes | If third party | Less likely |
| Response bias | Need internet access * | Need literacy | Need phone | May be seen as coercive |

* Not an issue when using online survey to assess satisfaction with online service

*Resources for Data Collection*

- Common Measurements Tool (CMT), developed by the Institute for Citizen-Centred Services, is free of charge to all levels of government in Canada.

- Tested survey questions on internal and external client satisfaction for full range of service delivery channels.
- Benchmarking against other results available for a fee.

- SNAP Survey Software is already licensed by the ministry.
  - Can be used to deliver online or telephone surveys (for telephone surveys, administrator enters data into SNAP, rather than respondent).
  - Real-time survey results can be monitored throughout the time the survey is online, and SNAP can tabulate final results for analysis.
  - Data is kept in Canada, so no privacy issues due to US-based data.
  - Cheaper and faster than other survey methods, although most appropriate for simple responses/topics.
- Personnel, both contract and in-house staff.
  - The ministry has in-house expertise to develop and deliver online surveys, and to perform data analyses.
  - The ministry has previously used both contractors and in-house personnel to conduct survey research (e.g., Malatest and Associates).

*Options – by Service Delivery Channel*

The most efficient and effective data collection will vary by service delivery channel.

- Online SSAA tool is used by most new applicants, and could trigger data collection about the intake process:
  - SSAA users have demonstrated internet access/comfort using online resources, so a link to an online survey should be quite effective.
  - Survey should be external to the SSAA tool, to separate client satisfaction questions from application questions, ensure the survey is not seen as coercive, and ensure survey questions can be updated easily if required.
  - Survey could be developed using SNAP survey software with CMT questions (or questions derived from CMT).
  - There are several possible options for linking a survey to the SSAA:
    - Add a link at the end of the SSAA tool to an external survey, OR
    - Add a link in the SSA Application Submission Details email to an external survey, OR
    - Add a link on the SSAA website.
  - Not all users email the SSAA Submission Details, and users may not return to the SSAA website following submission, so adding a link to the end of the SSAA tool should generate the highest response rate.

  - The survey could include as many or as few questions as desired, and may be changed when required without affecting the SSAA tool (the link would be static, the survey reached by the link could be dynamic).
- Face-to-face service could trigger data collection about reasons clients come in to the office, or general information about the service(s) they receive:
  - Comment card/box – quick, easy, inexpensive, can use CMT wording, can include closed- and/or open-ended questions.
  - Handout with link to online survey, could be part of comment card, e.g., "Don't have time now? Fill in our survey online at www...".
  - Kiosk – add online survey to office kiosks.
  - Face-to-face survey – following service delivery, clients could be asked to participate in a brief survey/interview, ideally delivered by a separate staff person – this is not recommended as an ongoing data collection method due to response bias (perception that responses will affect benefits), and staff time required – could do one-off projects using co-op students who collect information from clients at offices.
- Telephone service could trigger data collection about reasons clients telephone, or general information about the service(s) they receive:
  - Automated message directing callers to the website for online survey – however, the automated message would be heard prior to the service being provided and functionality may not be available in all service areas.
  - Staff provide clients the web link after provision of service - however, this creates added workload pressures, and may introduce bias if the web link is not provided consistently.
  - A random survey could be conducted of clients receiving services by telephone – based on their service channel, they have access to phone service, so bias is limited.
- Email service could trigger data collection about the bus pass program, which is currently the only program for which email service is available:
  - Link to online external survey tool sent in all responding emails.
- Fax service – unsure of what services are available by fax:
  - No options specific to fax channel.
- Complaints processes could trigger data collection about the reasons clients complain, the service(s) they complain about, whether the complaint was resolved or not, and how services could be improved:
  - Assessment of existing metrics to determine volume, type of complaints.

  - Specific survey or focus group in response to complaints – e.g., what worked, what didn't work, recommendations for improvement.
- All channels, a random sample of clients could be surveyed:
  - Sample(s) could be based on type of service requested/provided, service delivery channel used, client type, or any other relevant criteria.
  - Where possible, any general surveys should collect data on client type and type of service requested/provided, to determine if there are differences in experience associated with client type or type of service.
  - Need to work with other ministry branches/divisions to pull random samples.
  - Random sample surveys could be mail-out, telephone, or online survey.
  - Could add mail-out survey or link to online survey to cheque stuffer to all (or selected) clients – low cost, but would need to monitor response rates.

*Client Satisfaction Options*

- Establish comment boxes, with comment cards using CMT questions – low-cost, quick win item could position the ministry to develop a feedback culture, and is a simple way to begin evaluating face-to-face service delivery (ongoing).
- Develop an online survey, and embed links to the survey in the following locations:
  - End of the SSAA tool – audience: all new applicants (ongoing).
  - On the ministry's website – audience: all website visitors (ongoing).
  - In any outbound emails to clients – audience: bus pass users (one-time).
  - On the comment card, e.g., "For the complete survey, go to www..." – audience: face-to-face service recipients (ongoing).
  - On the cheque stuffer with monthly benefit – audience: general caseload (for specific surveys, or occasional promotion of ongoing website survey).
- If further evaluation is required, a telephone survey could be initiated to target specific types of clients, or clients receiving specific types of services – this sort of survey could be repeated at regular intervals (e.g., annually) to track trends.

Page 082 to/à Page 101

Withheld pursuant to/removed as

s.13

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Tuesday, April 2, 2013 1:49 AM |
| **To:** | Bandechha, Pardip MSD:EX; D'Gal, Judy MSD:EX |
| **Subject:** | Client Feedback Summary and Advocate Exec Summary |
| **Attachments:** | Client Feedback Summary - Focus Group Notes and Themes (Working Copy).docx; Advocate Consultation Executive Summary - What We Heard (March 2013).docx |
| **Follow Up Flag:** | Follow up |
| **Flag Status:** | Flagged |

Hi Pardip and Judy, I hope you both had a wonderful long weekend (as I did).

As you know, the feedback reports are a high priority this week so I'd like to discuss capacity as I manage all the pieces that are involved. Darcy is available to assist so I'll assess what can go to her (difficult for her without the context we have but still a good resource to draw upon).

Here is a status update:

- Norma has drafted the full report for the client feedback which I have reviewed and provided feedback on. She will be updating the full report and drafting the executive summary on Tuesday.
- **We need to finalize the client feedback rollup** (attached) to include in the full report as an appendix. I am hoping you (Pardip) can tackle that given your experience with the advocate feedback. Ronnie worked on the rollup on Thursday and I updated some further, but there is still more to do on it given our/your experience with the advocate feedback.
- We will need to review the client session evaluation feedback and online client portal bullets included in the full report Norma will get to us sometime tomorrow as they were not initially 'tweaked'/summarized further, though I have asked Norma to theme and summarize the evaluation feedback. The portal feedback may be fine, we can assess with Judy Tuesday.
- I drafted the Advocate Consultation Executive Summary (attached) for our collective review Tuesday.
- We still need to do the Advocate Consultation full report but I will see if Darcy can draft that given that it is predominantly the session rollup and exec summary combined.
- Jennifer is assisting in getting me the Staff Feedback to date. Mike Woodcock ran some staff engagement feedback sessions and he has been asked to provide a summary from those sessions. I intend to include an executive summary of staff feedback with the other reports.
- Once these reports are in signoff, we will need to work on a detailed Channel Strategy Work Plan based on the feedback, themes, and priorities identified. This will include Quick Wins and longer term deliverables to improve service delivery.
- We will also need to establish a process to track progress, including *linkages* to the deliverables and stakeholder feedback (such as any training initiatives from Learning Services, or policy tweaks) that tie into responding to the feedback we've received.

Should be a fun, productive short week. All in stride... we're in decent shape.

Terri

**AGENDA – Wednesday, March 6, 3013**

**Region 1 Advocate Consultation Focus Group**

**Live Meeting / Conference Call**

** All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

*** Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* ..... **9:00 – 9:25**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of the Region 2 & 3 consultation session*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25 – 9:55**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55 – 10:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* ..... **10:55 – 12:10**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other **key/priority** suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **12:10 – 12:30**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:30**

## AGENDA – Thursday, March 14, 2013

## Region 4 Advocate Consultation Focus Group

## Live Meeting / Conference Call

** All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

*** Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* .....**9:00**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of recent consultation sessions*

2. **Overview of Channel Strategy** *(Terri)* .....**9:25**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* .....**9:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* .....**10:40**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other **key/priority** suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** .....**11:50**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session**.....**12:00**

## AGENDA – Thursday, March 21, 2013

### Region 5 Advocate Consultation Focus Group

### Live Meeting / Conference Call

* *All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

** *Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* ..... **9:00**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of recent consultation sessions*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* ..... **10:40**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other key/priority suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **11:50**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:00**

# MINISTRY OF SOCIAL DEVELOPMENT
# DECISION NOTE

**DATE:** November 20, 2012

**PREPARED FOR:** Mark Sieben, Deputy Minister

**ISSUE:** **Channel Strategy: Focus Groups with Advocacy Organizations**

## BACKGROUND:

The objective of this note is to obtain approval to consult with advocacy organizations on key aspects of the Channel Strategy.

In May 2012, a Stakeholder Engagement Plan (Appendix A) was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and, determine and monitor client satisfaction on an ongoing basis. One deliverable of the Plan is to hold focus group sessions with external stakeholders, with the target audiences identified to be advocacy organizations and clients.

The ministry launched a survey on the Self Serve Assessment and Application tool (SSAA) in October 2012, to monitor client satisfaction with the SSAA tool and collect data on this self-serve service delivery channel that will be useful in making future SSAA enhancements. The introduction of the external-facing survey was well received by advocacy organizations consulted, and is the first of the engagement initiatives within the Stakeholder Engagement Plan to be implemented.

The next activity in the Stakeholder Engagement Plan is to consult with advocacy organizations. By reaching out to advocacy organizations through a dedicated focus group session the ministry can enhance its current relationships with these external stakeholders and obtain timely and valuable feedback for the Channel Strategy.

## DISCUSSION:

**Objectives:**

- Introduce and develop advocacy awareness of the Channel Strategy, intended to enhance service delivery;
- Identify priorities within each channel, and obtain feedback regarding potential benefits/implications for clients and critical success factors;

- Obtain specific feedback regarding the scope, functionality and supports for a self serve portal that would be effective for clients and stakeholders; and
- Build a solid foundation for future engagement on Channel Strategy initiatives.

**Content and Format:**
The draft agenda (Appendix B) reflects the objectives of the sessions, providing opportunity to share information regarding service channels, receive input regarding current and future service delivery, opportunities, potential benefits and advice regarding consulting with clients.

An initial face to face session is anticipated to "kick off" the process in a meaningful way. Subsequent teleconferences will build upon the first session, and include a broader array of advocates.

The face-to-face session will be facilitated by ministry staff, and a ministry note-taker will also be present. Subsequent teleconferences will be facilitated by ministry staff (regional Community Relations and Service Quality Managers, and headquarters staff).

**Target Audience:**
The ministry values the relationships it has already formed with the advocacy community through regional meetings and the provincial Moving Forward Steering Committee (MFSC). It will be effective to leverage those relationships for these consultations. Region 2 and 3 advocacy organizations that participate on the MFSC or regional committees (Appendix C) will be invited to the face-to-face session. Subsequent teleconferences will be held with other regional advocacy organizations around the province. The MFSC and regional counterparts are considered the appropriate audience, as the advice received will focus on operational rather than policy implications.

The MFSC is co-chaired by the ministry and an advocate. The advocate co-chair has demonstrated skills in ensuring important issues are raised and discussed in a balanced, focused and pragmatic manner. It is anticipated that the initial face-to-face session will be more effective with the advocate co-chair's participation. However, s.22 s.22 and will be unable to attend unless her travel costs are covered.

**Timeframe:**
The first session (face-to-face) is intended to occur in December 2012, in order to feed into a broader timeline of stakeholder engagement that will inform channel design and other decisions.

**Costs:**
Appendix D provides cost implications for the subsequent options. A key principle in the design was to minimize costs while achieving the objectives. The first session would be one day, held at the Learning Service Branch, and facilitated by ministry staff : Judy D'Gal, Director, Implementation and Stakeholder Relations Branch (Regional Operations), who has developed a solid relationship with the advocacy organizations through the MFSC and Elaine Cross, Manager, Learning Services Branch who is an experienced facilitator. Both have previously delivered similar sessions to advocacy organizations for the ministry. One additional staff person will attend as a note taker. Hospitality costs will be modest.

**OPTIONS:**

s.13

s.13

Mark Sieben

Cliff#: 177470
Version #: 1
Updated: November 20, 2012

## MINISTRY OF SOCIAL DEVELOPMENT
## DECISION NOTE

Deputy Minister

| Prepared by: | Reviewed By: | Initial: | Date: |
|---|---|---|---|
| Pardip Bandechha<br>Policy and Project Analyst | | | |
| | Judy D'Gal<br>Director<br>Regional Operations | _____ | _____ |
| | Susan Mader<br>Communications Director<br>GCPE | _____ | _____ |
| | Janice Nakamura<br>Executive Director<br>Regional Operations | _____ | _____ |
| | Molly Harrington<br>Assistant Deputy Minister<br>Policy and Research Division | _____ | _____ |
| | Sharon Moysey<br>Assistant Deputy Minister<br>Regional Services Division | _____ | _____ |

**Appendix B**

## DRAFT AGENDA

1. **Opening Remarks and Introductions** ..... **9:00 – 9:30**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of Session*
2. **Overview of Channel Strategy Project** ..... **9:30 – 11:00**
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Overview of possible future channel options and service delivery enhancements*
   - *Demo of self serve portal and seek feedback/input on scope, functionality and support for portal*

**Break** ..... **11:00 –11:15**

3. **Participant Sharing: Roles/Experiences/Examples** ..... **11:15 – 12:00**
   - *Opportunity to share what is tricky with the current service delivery channels*

**Lunch** ..... **12:00 – 1:00**

4. **Brainstorming Groups** ..... **1:00 – 2:15**
   - *Participants work in smaller groups to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email etc)*
   - *Each group works together to identify opportunities/future enhancements for consideration*
   - *Scope, functionality and supports for channel development and potential benefits/impacts*
   - *Identification of opportunities to consult with clients*
5. **Report Out From Brainstorming Groups** ..... **2:15 – 2:45**

**Break** (*All participants have opportunity to add comments for the other topics*) ..... **2:45 – 3:00**

6. **Prioritizing Groups** ..... **3:00 – 3:30**
   - *Review of Report Out (additional comments)*
   - *Participants prioritize top 3 opportunities (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel)*
7. **Report Out on Key Opportunities Identified** ..... **3:30 – 3:45**
8. **Next Steps** ..... **3:45 – 4:00**
   - *Next steps – How do we keep the dialogue going?*
   - *Closing remarks*
9. **End of Session** ..... **4:00**

**Note: Agenda may be refined after initial focus group, as needed**

**Appendix C**

The advocacy organization representatives that would be invited to the face to face consultation would primarily include representatives from Region 2 and 3, from the provincial MFSC or the regional committees.

| Organization | Community | Name of Advocate |
|---|---|---|
| Okanagan Advocacy and Resource Society (OARS) | Kelowna | Tish Lakes (MFSC Advocate Co-Chair) |
| Community Legal Assistance Society (CLAS) | Vancouver | Alison Ward |
| Intercultural Community Services (PICS) Society | Vancouver | Gurpreet Pabla, |
| BC Public Interest Advocacy Centre (BCPIAC) | Vancouver | Tannis Braithwaite |
| BC Public Interest Advocacy Centre (BCPIAC) | Vancouver | Andrew Waugh |
| BC Public Interest Advocacy Centre (BCPIAC) | Vancouver | Ros Salvador |
| MOSAIC | Vancouver | Stephanie Smith |
| BC Coalition of People with Disabilities | Vancouver | Robin Loxton |
| BC Coalition of People with Disabilities | Vancouver | Annette Murray |
| Motivation, Power & Achievement Society (MPA) | Vancouver | Gali Bar |
| First United Church Advocacy | Vancouver | Susan Henry |
| First United Church Advocacy | Vancouver | DeDe Dusfresne |
| Maximally Assisted Therapy Program | Vancouver | Emma Wolchok |
| Downtown Eastside Women Centre | Vancouver | Leesa Macdowell |
| Canadian Mental Health Association | (BC Division) | Jonny Morris |
| Sources | Surrey/Delta | Soraya VanBuskirk |
| Sources | Surrey/Delta | Millicent Hawryluk |
| Community Legal Advocacy Office | Mission/Abbotsford/ Chilliwack | Ellen Boyes |
| Options | Surrey/Delta | Connie Hong |
| Options | Surrey/Delta | Iris Solorzano |
| First United Advocacy | New Westminster/Burnaby | Rosemarie Collins |
| Share Family and Community Services Society - Legal Advocacy Program | Port Moody/Coquitlam/Port Coquitlam | Maureen St. Denis |
| BC Cancer Agency (Province) | Province | Shelley Pennington |

**Appendix D**

**COST ESTIMATE OF PROPOSED OPTIONS:**

**Option 1**

| Description | Costs |
|---|---|
| Venue cost (Learning Services Branch) | $0.00 |
| Facilitation (Regional Operations & Learning Services staff) | $0.00 |
| Travel for Regional Operational Staff | 720.00 |
| Morning Refreshments for 20 persons - juice and muffins | $200.00 |
| Lunch for 20 persons - juice and sandwiches | $600.00 |
| TOTAL Option 1 | $1320.00 |
| Travel for MFSC Advocate Co-Chair* | $1480.00 |
| TOTAL Option 1 + * | $2800.00 |

*MFSC Advocate Co-Chair is based out of Kelowna, and would be instrumental in participating in the face-to-face session.
Additional session costs would be minimal, as no travel or meals would be required. The only expected cost would be teleconference charges.

**Option 2**
Cost would be minimal, as no travel or meals would be required. The only expected cost would be teleconference charges.

**COST OF PAST EVENTS:**

**Cost Estimate for November 5, 2007 Immigrant/Refugee and Racialized Consultation**

| Description | Costs |
|---|---|
| **Preplanning Cost** | |
| Room and Food | $2,000.00 |
| Travel - Ministry Staff (8) | $4,800.00 |
| Travel - Legal Advocates (3) | $500.00 |
| **November 5 Consultation** | |
| Hotel Cost (Room and Food) | $3,500.00 |
| Ministry Travel (14 Ministry Staff) | $18,000.00 |
| Advocate Travel (25 Legal Advocates) | $6,000.00 |
| **Contract (Facilitation)** | $12,000.00 |
| TOTAL | $46,800.00 |

*Sources from Cliff: 87288*

**Cost Estimate for December 4, 2009 Human Rights/Accommodation/Mental Health Training Development Session**

| Description | Costs |
|---|---|
| Morning Refreshments for 24 persons - juice and muffins | $120.00 |
| Lunch for 24 persons - juice and sandwiches | $480.00 |
| Facilitation in House (Regional Operations & Learning Services) | $0.00 |
| Travel – Ministry staff (regional Operations) | $600.00 |
| TOTAL | $1200.00 |

*Sources from Cliff: 152171*

Wednesday, March 6, 2013 (9:00 AM - 12:30 PM)

BRITISH COLUMBIA | Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 1 Advocate Focus Group Session

**Dial in:** s.15,s.17

**ID Code:** s.15,s.17 (please use *6 to mute and unmute your phone – thank you)

## Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations**, Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services**, MSD *(Facilitator)*

**Jeannine Bousquet – Regional Manager, Community Relations and Service Quality**, MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(notes)*

**Diana Murru** – Regional Operations, MSD *(notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations**, Regional Operations, MSD *(Channel Strategy lead)*

## Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.**

Wednesday, March 6, 2013 (9:00 AM - 12:30 PM)

# Working Documents:

## Meeting Agenda

Agenda for
egion 1 Live Meeti

## Channel Strategy Presentation

Channel Strategy
(Advocate Ses...

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – **Terri** (slide 10 – 13 portal demos) https://theloop.gov.bc.ca/rsd/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

*(In Word version)*

Final Summary Notes
- Jan 8 Region 2 and

Thursday, March 14, 2013 (9:00 AM - 12:00 PM)

BRITISH COLUMBIA | Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 4 Advocate Focus Group Session

**Dial in:** s.15,s.17

**ID Code:** s.15,s.17 (please use *6 to mute and unmute your phone – thank you)

## Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations**, Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services**, MSD *(Facilitator)*

**Harleen Price – Regional Manager, Community Relations and Service Quality**, MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(logistical/technical support & notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations**, Regional Operations, MSD *(Channel Strategy lead)*

## Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.**

Thursday, March 14, 2013 (9:00 AM - 12:00 PM)

# Working Documents:

## Meeting Agenda

Agenda for Region 4
Live Meeting Advocat

## Channel Strategy Presentation

Channel Strategy
(Advocate Session - I

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – **Terri** (slide 10 – 13 portal demos) https://sbcicou.gov.bc.ca/rsd/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

*(In Word version)*

Final Summary Notes
- Jan 8 Region 2 and

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

BRITISH COLUMBIA | Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 5 Advocate Focus Group

### Please remember to dial in also...

**Dial in:** s.15,s.17

**ID Code:** s.15,s.17 (please use *6 to mute/unmute your phone – thank you)

### Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations**, Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services**, MSD *(Facilitator)*

**Ian Harrower – Regional Manager, Community Relations and Service Quality**, MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(logistical/technical support & notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations**, Regional Operations, MSD

### Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to assess our current service delivery effectiveness and seek feedback to inform future service delivery decisions.**

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

# Working Documents:

## Meeting Agenda

Agenda for Region 5
Live Meeting Advocat

## Channel Strategy Presentation

Channel Strategy
(Advocate Session - I

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – **Terri** (slide 10 – 13 portal demos) https://thelgpp.gov.bc.ca/rsd/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

*(In Word version)*

Final Summary Notes
- Jan 8 Region 2 and

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

BRITISH COLUMBIA Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 5 Advocate Focus Group

**Please also dial in:** s.15,s.17

**Enter ID Code:** s.15,s.17

(please use *6 to mute and unmute your phone – thank you)

For technical support, please contact Pardip directly at 250-387-2889

## Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations,** Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services,** MSD *(Facilitator)*

**Ian Harrower – Regional Manager, Community Relations and Service Quality,** MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(logistical/technical support & notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations,** Regional Operations, MSD *(Channel Strategy lead)*

## Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.**

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

# Working Documents:

## Meeting Agenda

Agenda for Region 5
Live Meeting Advocat

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

## Channel Strategy Presentation

Channel Strategy
(Advocate Session - I

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – **Terri** (slide 10 – 13 portal demos) https://theloop.gov.bc.ca/ssd/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

BRITISH COLUMBIA | Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 5 Advocate Focus Group

### Please remember to dial in also...

**Dial in:** s.15

**ID Code:** s.15,s.17 (please use *6 to mute/unmute your phone – thank you)

### Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations**, Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services**, MSD *(Facilitator)*

**Ian Harrower – Regional Manager, Community Relations and Service Quality**, MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(logistical/technical support & notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations**, Regional Operations, MSD

### Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to assess our current service delivery effectiveness and seek feedback to inform future service delivery decisions.**

Thursday, March 21, 2013 (9:00 AM - 12:00 PM)

# Working Documents:

## Meeting Agenda

Agenda for Region 5
Live Meeting Advocat

## Channel Strategy Presentation

Channel Strategy
(Advocate Session - I

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – Terri (slide 10 – 13 portal demos) https://theloop.gov.bc.ca/rso/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

Final Summary Notes
- Jan 8 Region 2 and

*(In Word version)*

# Channel Strategy

March 14, 2013

Advocate Focus Group Session
Region 4

BRITISH COLUMBIA | Ministry of Social Development

## Opening

- Welcome and Opening Remarks
- Your Facilitators:
  - **Terri Archer**, Senior Project Manager, Stakeholder Relations
  - **Elaine Cross**, Senior Manager, Learning Services
- Brief Context of Session
- Participant Introductions
  - Name
  - Organization representing

## Ground Rules

- To seek to understand
- To be empathetic and practice non-judgmental listening
- To ask clarifying questions
- To share the dialogue
- To being committed to process and outcomes
- To agree to disagree, if needed
- All information and knowledge shared in this meeting will be treated as "Without Prejudice"*.

**Note:** *"Without Prejudice" offers the protection of privilege to participants. It means that the information exchanged during this proceeding will not be used in any future proceedings regarding the issues unless this same information can be discovered through other means.*

## Agenda

| | |
|---|---|
| • Opening Remarks and Introductions | 9:00 am |
| • Overview of Channel Strategy Project | 9:25 am |
| • Possible Future Channel Enhancements | 9:55 am |
| • Brainstorming | 10:40 am |
| • Next Steps | 11:50 am |
| • End of Session | noon |

## *Service Delivery As We Know It*

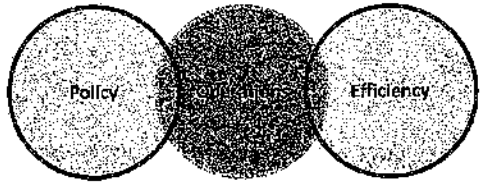
- The ministry currently provides a variety of options to citizens to access information, assistance and services. These channels and services provided by ministry staff include:
  - internet/online, telephone, face-to-face offices, mail, fax and e-mail requests, after hours unit provides access for urgent needs, outreach and integration services provided by specialised staff and Trusted Third Party partners.

- The Ministry of Social Development currently serves approximately 180,000 clients

- In 2011, the ministry processed 77,494 applications

- In April 2012, the ministry implemented Phase 2 of the Integrated Case Management system and the new Employment Program of BC

## What Have We Done Recently?



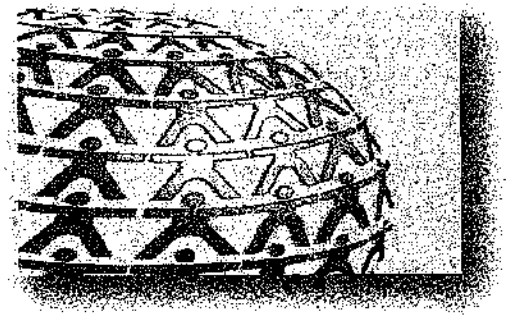

- Improved timelines for reconsiderations
- Self Serve Assessment and Application enhancements
- Optional survey introduced for applicants to monitor client satisfaction
- Hours of Contact changes
- Improved telephone service response times
- Updated Health Assistance Branch client correspondence – plain language

## What Are Our Service Delivery Challenges?

- A number of service delivery pressures exist, including:
  - at times, long telephone wait times, especially during peak periods
  - a significant proportion of telephone calls dropped resulting in repeat client follow-ups and long line ups at offices
  - delays in responsiveness to client requests
- Increased number of service requests

## *We want to hear from you!*

- Please describe:
  - Your client base/role(s)
  - Any issues related to current service delivery channels
  - Your first-hand experiences with ministry clients, staff, policies, practices and other advocates as they relate to service delivery
  - Opportunity to share what is "working" and what is "tricky" with the current service delivery channels



## Channel Strategy: What's Next in Service Delivery?

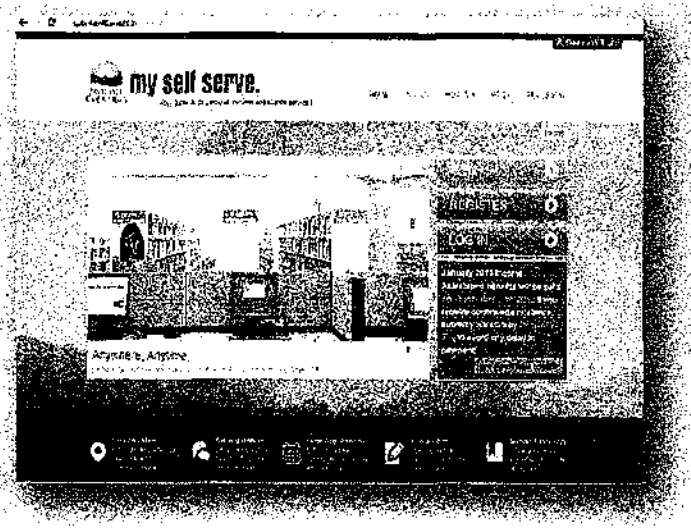
- The goals of the Channel Strategy are:
  - Broadened client access to services through multi-channel service delivery
  - Maximize efficiency
  - Integrate with government priorities and channels
  - Continuous improvement to ensure effectiveness and to consider future technological advances
- It is timely to consider ways to transform service delivery through the development of a service delivery Channel Strategy.
- The Channel Strategy envisions a technology-enabled, integrated contact system for telephone and web application services to complement existing and future channels

## How Do We Move Forward?

- Understand the needs of our clients to help us to deliver programs and supports that best address those needs
- Identify the gaps between what clients expect or need from the organization and the service they are actually receiving
- Initiate a primary consultation process to receive feedback about our current service delivery channels, and to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel
- Focus groups have begun to obtain feedback on client consultation as well as perceptions around client needs and supports
- Ensure the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design

## Possible Future Channel Enhancements

- Overview of possible future channel options and service delivery enhancements
- **Demo:** Online Client Portal



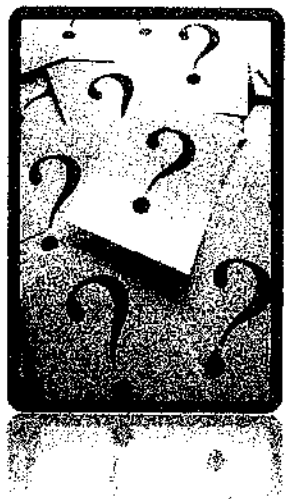
# Online Client Portal - demo

1. Launch Page
2. How Tos and FAQs
3. Browse Resources
4. Find a Form
5. Find an Office
6. Your Account
7. Message Board
8. Submit a Document
9. Feedback
10. Ask a Question

## *What Can We Achieve Today?*

- Feedback on the Online Self-Serve Portal: scope, functionality and support

**We Value Your Feedback!**



## Brainstorming – Let's Get Started!

- Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc).

- Opportunity to add any other key/priority suggestions for each of the channels i.e., What's working, what's not.

- Review & prioritize top 3 opportunities and provide your feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel)

## *Telephone Channel*

***Top Three Priorities Identified by Advocates:***

1. 1 800/1 866 or direct phone line for advocates

2. Ability to send faxes directly to phone line (1 866 or other line)

3. Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)

Do you agree?

## Face-to-Face Channel

***Top Three Priorities Identified by Advocates:***

1. Increase accessibility for those in need of this channel (i.e., all language and disability needs)

2. Do not turn away clients – need better coordination of services across all channels

3. Staff it – adequate level of resources , skill set, self care as a priority focus

Do you agree?

## Internet/Online Channel

### Top Three Priorities Identified by Advocates:

1. Improve the Self Serve Assessment and Application tool
   - Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete
   - Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand
   - Fewer words – more simple words – and online help
   - Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them
   - More signs you are done; i.e., if applicants are given a checklist upfront
2. Appointment booking
   - Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment

Do you agree?

## *Other Including Outreach, Mail, Fax, Email ETC*

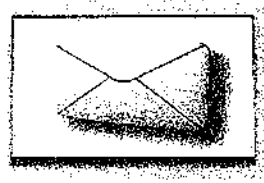
***Top Three Priorities Identified by Advocates:***

1. Increase the number of liaisons
   - Employment and Assistance Workers, mental health and homeless outreach services

2. Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)

3. Increase the use of triaging/fax and use of dedicated workers by issue when appropriate

Do you agree?



## *Client Consultation*

1. Client focus groups in each region
2. Feedback on our service delivery channels including the online portal

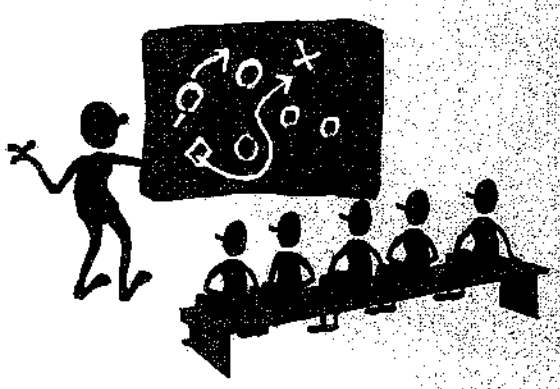
Other suggestions/recommendations for client consultation?

## Next Steps

- What's next?
- How will we use this information?

## Reflections

- How would you describe your experience today?
- Was this a useful approach?
- Suggestions/comments



# Closing

# Channel Strategy

March 21, 2013

Advocate Focus Group Session

Region 5

BRITISH COLUMBIA | Ministry of Social Development

## Opening

- Welcome and Opening Remarks
- Your Facilitators:
  - **Terri Archer**, Senior Project Manager, Stakeholder Relations
  - **Elaine Cross**, Senior Manager, Learning Services
- Brief Context of Session
- Participant Introductions
  - Name
  - Organization representing

## Ground Rules

- To seek to understand
- To be empathetic and practice non-judgmental listening
- To ask clarifying questions
- To share the dialogue
- To being committed to process and outcomes
- To agree to disagree, if needed
- All information and knowledge shared in this meeting will be treated as "Without Prejudice"*.

**Note:** *"Without Prejudice" offers the protection of privilege to participants. It means that the information exchanged during this proceeding will not be used in any future proceedings regarding the issues unless this same information can be discovered through other means.*

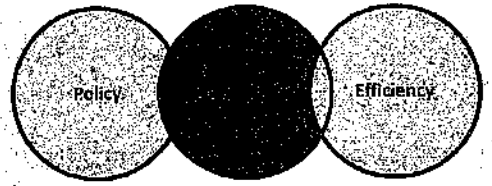
# Agenda

| | |
|---|---|
| • Opening Remarks and Introductions | 9:00 am |
| • Overview of Channel Strategy Project | 9:25 am |
| • Possible Future Channel Enhancements | 9:55 am |
| • Brainstorming | 10:40 am |
| • Next Steps | 11:50 am |
| • End of Session | noon |

## Service Delivery As We Know It

- The ministry currently provides a variety of options to citizens to access information, assistance and services. These channels and services provided by ministry staff include:
  - internet/online, telephone, face-to-face offices, mail, fax and e-mail requests, after hours unit provides access for urgent needs, outreach and integration services provided by specialised staff and Trusted Third Party partners.
- The Ministry of Social Development currently serves approximately 180,000 clients
- In 2011, the ministry processed 77,494 applications
- In April 2012, the ministry implemented Phase 2 of the Integrated Case Management system and the new Employment Program of BC

## What Have We Done Recently?



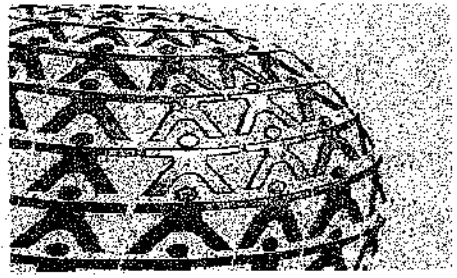

- Improved timelines for reconsiderations
- Self Serve Assessment and Application enhancements
- Optional survey introduced for applicants to monitor client satisfaction
- Hours of Contact changes
- Improved telephone service response times
- Updated Health Assistance Branch client correspondence – plain language

## What Are Our Service Delivery Challenges?

- A number of service delivery pressures exist, including:
  - at times, long telephone wait times, especially during peak periods
  - a significant proportion of telephone calls dropped resulting in repeat client follow-ups and long line ups at offices
  - delays in responsiveness to client requests
- Increased number of service requests

## We want to hear from you!

- Please describe:
  - Your client base/role(s)
  - Any issues related to current service delivery channels
  - Your first-hand experiences with ministry clients, staff, policies, practices and other advocates as they relate to service delivery
  - Opportunity to share what is "working" and what is "tricky" with the current service delivery channels



## Channel Strategy: What's Next in Service Delivery?

- The goals of the Channel Strategy are:
  - Broadened client access to services through multi-channel service delivery
  - Maximize efficiency
  - Integrate with government priorities and channels
  - Continuous improvement to ensure effectiveness and to consider future technological advances

- It is timely to consider ways to transform service delivery through the development of a service delivery Channel Strategy.

- The Channel Strategy envisions a technology-enabled, integrated contact system for telephone and web application services to complement existing and future channels

## How Do We Move Forward?

- Understand the needs of our clients to help us to deliver programs and supports that best address those needs
- Identify the gaps between what clients expect or need from the organization and the service they are actually receiving
- Initiate a primary consultation process to receive feedback about our current service delivery channels, and to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel
- Focus groups have begun to obtain feedback on client consultation as well as perceptions around client needs and supports
- Ensure the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design

## Possible Future Channel Enhancements

- Overview of possible future channel options and service delivery enhancements
- **Demo:** Online Client Portal

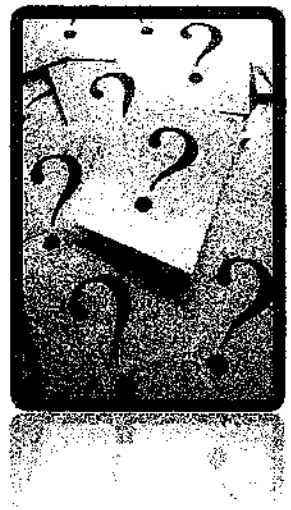
# Online Client Portal - demo

1. Launch Page
2. How Tos and FAQs
3. Browse Resources
4. Find a Form
5. Find an Office
6. Your Account
7. Message Board
8. Submit a Document
9. Feedback
10. Ask a Question

## What Can We Achieve Today?

- Feedback on the Online Self-Serve Portal: scope, functionality and support

**We Value Your Feedback!**



## *Brainstorming – Let's Get Started!*

- Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc).
- Opportunity to add any other key/priority suggestions for each of the channels i.e., What's working, what's not.
- Review & prioritize top 3 opportunities and provide your feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel)

## Telephone Channel

***Top Three Priorities Identified by Advocates:***

1. 1 800/1 866 or direct phone line for advocates

2. Ability to send faxes directly to phone line (1 866 or other line)

3. Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)

Do you agree?

## Face-to-Face Channel

***Top Three Priorities Identified by Advocates:***

1. Increase accessibility for those in need of this channel (i.e., all language and disability needs)

2. Do not turn away clients – need better coordination of services across all channels

3. Staff it – adequate level of resources , skill set, self care as a priority focus

Do you agree?

## Internet/Online Channel

### Top Three Priorities Identified by Advocates:

1. Improve the Self Serve Assessment and Application tool
   - Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete
   - Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand
   - Fewer words – more simple words – and online help
   - Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them
   - More signs you are done; i.e., if applicants are given a checklist upfront
2. Appointment booking
   - Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment

Do you agree?

## Other Including Outreach, Mail, Fax, Email ETC

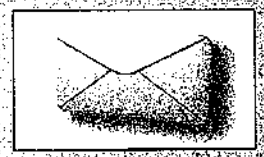
***Top Three Priorities Identified by Advocates:***

1. Increase the number of liaisons
   - Employment and Assistance Workers, mental health and homeless outreach services

2. Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)

3. Increase the use of triaging/fax and use of dedicated workers by issue when appropriate

Do you agree?



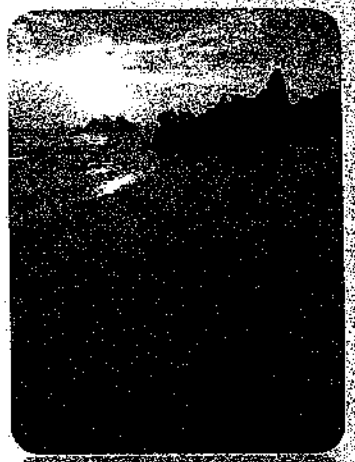
## Client Consultation

1. Client focus groups in each region
2. Feedback on our service delivery channels including the online portal

- Other suggestions/recommendations for client consultation?

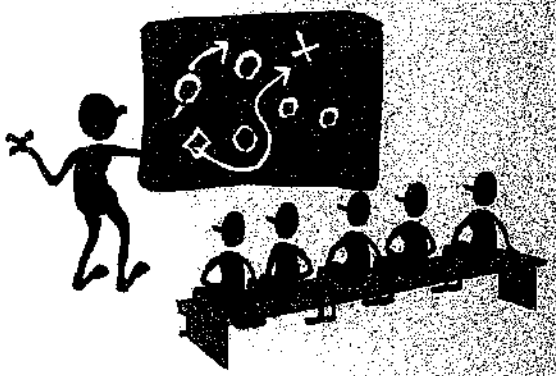
## Next Steps

- What's next?
- How will we use this information?



## Reflections

- How would you describe your experience today?
- Was this a useful approach?
- Suggestions/comments



## Closing

# Channel Strategy

March 6, 2013

Advocate Focus Group Session

Region 1

BRITISH COLUMBIA | Ministry of Social Development

## Opening

- Welcome and Opening Remarks
- Your Facilitators:
  - **Terri Archer**, Senior Project Manager, Stakeholder Relations
  - **Elaine Cross**, Senior Manager, Learning Services
- Brief Context of Session

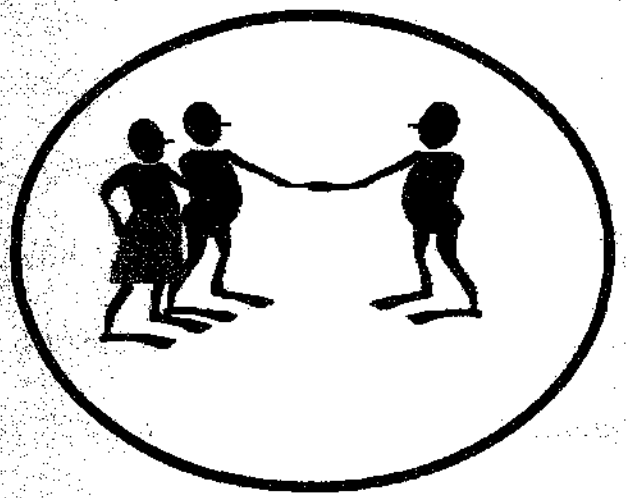
## Ground Rules

- To seek to understand
- To be empathetic and practice non-judgmental listening
- To ask clarifying questions
- To share the dialogue
- To being committed to process and outcomes
- To agree to disagree, if needed
- All information and knowledge shared in this meeting will be treated as "Without Prejudice"*.

**Note:** *"Without Prejudice" offers the protection of privilege to participants. It means that the information exchanged during this proceeding will not be used in any future proceedings regarding the issues unless this same information can be discovered through other means.*

## Introductions

- Please share your:
  - Name
  - Organization you are representing



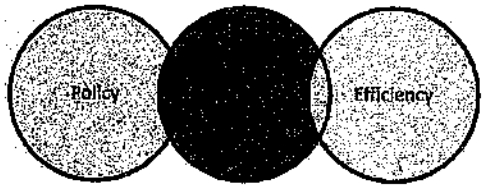
## Agenda

| | |
|---|---|
| • Opening Remarks and Introductions | 9:00 – 9:25 am |
| • Overview of Channel Strategy Project | 9:25 – 9:55 am |
| • Possible Future Channel Enhancements | 9:55 – 10:55 am |
| • Brainstorming | 10:55 am – 12:10 pm |
| • Next Steps | 12:10 – 12:30 pm |
| • End of Session | 12:30 pm |

## *Service Delivery As We Know It*

- The ministry currently provides a variety of options to citizens to access information, assistance and services. These channels and services provided by ministry staff include:
  - internet/online, telephone, face-to-face offices, mail, fax and e-mail requests, after hours unit provides access for urgent needs, outreach and integration services provided by specialised staff and Trusted Third Party partners.
- The Ministry of Social Development currently serves approximately 180,000 clients
- In 2011, the ministry processed 77,494 applications
- In April 2012, the ministry implemented Phase 2 of the Integrated Case Management system and the new Employment Program of BC

## What Have We Done Recently?




- Improved timelines for reconsiderations
- Self Serve Assessment and Application enhancements
- Optional survey introduced for applicants to monitor client satisfaction
- Hours of Contact changes
- Improved telephone service response times
- Updated Health Assistance Branch client correspondence – plain language

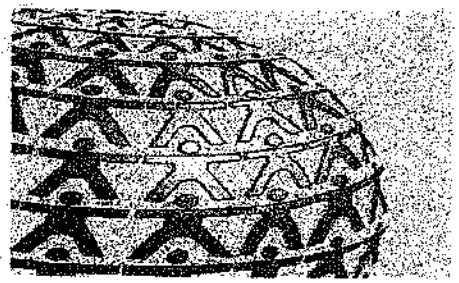
## What Are Our Service Delivery Challenges?

- A number of service delivery pressures exist, including:
  - at times, long telephone wait times, especially during peak periods
  - a significant proportion of telephone calls dropped resulting in repeat client follow-ups and long line ups at offices
  - delays in responsiveness to client requests

- Increased number of service requests

## We want to hear from you!

- Please describe:
  - Your client base/role(s)
  - Any issues related to current service delivery channels
  - Your first-hand experiences with ministry clients, staff, policies, practices and other advocates as they relate to service delivery
  - Opportunity to share what is "working" and what is "tricky" with the current service delivery channels



## Channel Strategy: What's Next in Service Delivery?

- The goals of the Channel Strategy are:
  - Broadened client access to services through multi-channel service delivery
  - Maximize efficiency
  - Integrate with government priorities and channels
  - Continuous improvement to ensure effectiveness and to consider future technological advances

- It is timely to consider ways to transform service delivery through the development of a service delivery Channel Strategy.

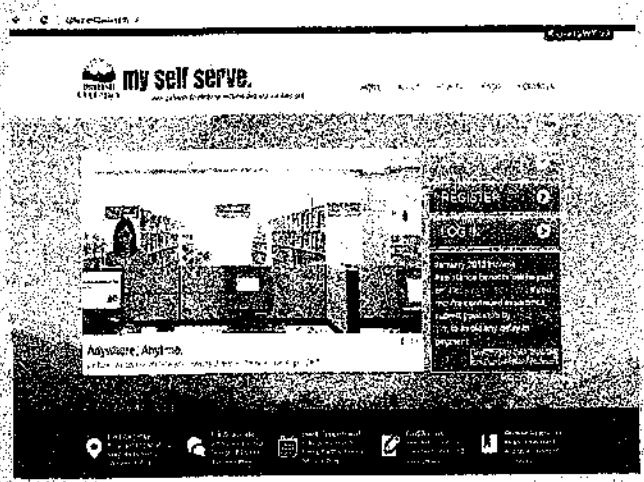
- The Channel Strategy envisions a technology-enabled, integrated contact system for telephone and web application services to complement existing and future channels

## How Do We Move Forward?

- Understand the needs of our clients to help us to deliver programs and supports that best address those needs
- Identify the gaps between what clients expect or need from the organization and the service they are actually receiving
- Initiate a primary consultation process to receive feedback about our current service delivery channels, and to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel
- Focus groups have begun to obtain feedback on client consultation as well as perceptions around client needs and supports
- Ensure the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design

## Possible Future Channel Enhancements

- Overview of possible future channel options and service delivery enhancements
- **Demo:** Online Client Portal



# Online Client Portal - demo

1. Launch Page
2. How Tos and FAQs
3. Browse Resources
4. Find a Form
5. Find an Office
6. Your Account
7. Message Board
8. Submit a Document
9. Feedback
10. Ask a Question

## What Can We Achieve Today?

- Feedback on the Online Self-Serve Portal: scope, functionality and support

**We Value Your Feedback!**

## Brainstorming – Let's Get Started!

- Participants **review summary document from Region 2 & 3 consultation** and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc).

- **Opportunity to add any other key/priority suggestions** for each of the channels i.e., What's working, what's not.

- **Review & prioritize top 3 opportunities and provide your feedback** (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel)

## Telephone Channel

***Top Three Priorities Identified by Advocates:***

1. 1 800/1 866 or direct phone line for advocates

2. Ability to send faxes directly to phone line (1 866 or other line)

3. Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)

Do you agree?

## Face-to-Face Channel

***Top Three Priorities Identified by Advocates:***

1. Increase accessibility for those in need of this channel (i.e., all language and disability needs)

2. Do not turn away clients – need better coordination of services across all channels

3. Staff it – adequate level of resources , skill set, self care as a priority focus

Do you agree?

## Internet/Online Channel

### *Top Three Priorities Identified by Advocates:*

1. Improve the Self Serve Assessment and Application tool
   - Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete
   - Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand
   - Fewer words – more simple words – and online help
   - Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them
   - More signs you are done; i.e., if applicants are given a checklist upfront
2. Appointment booking
   - Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment

Do you agree?

## Other Including Outreach, Mail, Fax, Email ETC

***Top Three Priorities Identified by Advocates:***

1. Increase the number of liaisons
   - Employment and Assistance Workers, mental health and homeless outreach services

2. Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)

3. Increase the use of triaging/fax and use of dedicated workers by issue when appropriate

Do you agree?

## Client Consultation

1. Client focus groups in each region
2. Feedback on our service delivery channels including the online portal

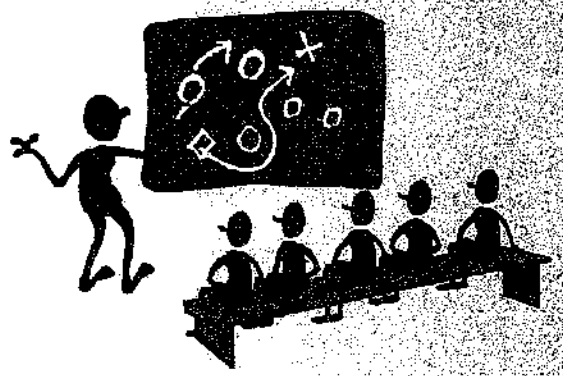
Other suggestions/recommendations for client consultation?

## Next Steps

- What's next?
- How will we use this information?

## Reflections

- How would you describe your experience today?
- Was this a useful approach?
- Suggestions/comments



## Closing

## Advocate Consultation Live Meeting with Tish Lakes

Wednesday, December 12, 2012 (1:30 PM-2:30 PM)

| | |
|---|---|
| Terri Archer | Regional Operations |
| Pardip Bandeccha | Regional Operations |
| Colleen Turner | Information Management Branch *(client online demo)* |
| Tish Lakes | Okanagan Advocacy and Resource Society (OARS), Kelowna, MFSC Co-Chair |

**Background**

A Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and, determine and monitor client satisfaction on an ongoing basis. A key deliverable of the Plan is to consult external stakeholders, with the target audiences identified to be advocacy organizations and clients.

While we plan to hold focus group sessions for both groups in the New Year, the timing with Christmas holidays required a more targeted and phased approach to begin engagement. The feedback received to date will inform the next phases of engagement.

**Advocate Feedback**

On December 12, 2012, Regional Operations consulted with Advocate rep, Tish Lakes and engaged in discussion around service delivery enhancement considerations and opportunities. An overview of the Channel Strategy was provided, including a demo of the proposed online client portal (My Self Serve).

To initiative the discussion, we summarized our current client service delivery model as providing service through a varied number of channels including telephone, online application tool, face-to-face, mail, fax, and email (i.e. Bus Pass Program). There is also service through Outreach and Trusted Third Parties. While our strategies must balance the needs of the clients, there are opportunities for increased efficiency and effectiveness.

We acknowledged some current service delivery channels such as call wait times, dropped calls and responsiveness to client requests. We then asked Tish the following questions and her responses are included.

**In your experience with our clients, what's tricky with the current service delivery channels?**

- Many new staff, coupled with technology (ICM):
  - Has made policy appear more restrictive
  - Problems/delays in producing cheques (Notice to End Tenancy requires payment within 5 days)
  - Delays in generating Request for Reconsiderations (these need to be produced quickly)

## Advocate Consultation Live Meeting with Tish Lakes

- Language barriers: need a coordinated flow (i.e. English as a second language clients are not offered help)
- Clients aren't being told that they still have the option of coming into a office to receive service
- Clients being directed to SSAA
- Delays in INA

**Client Online Portal Demo Feedback:**

- Add clearer instructions on the appointment page indicating that this tool is not the only option for getting an appointment time. Needs to indicate other options clearly (i.e., Phone number etc), particularly when there are no appointment times available online
- On the Community Resource page, ensure we check with agencies before adding them to the list. Ensure they want to be on the list and are appropriate for the page.
  - *It was noted that we can restrict the level of information/content shared on each page*
- Manage My Account: Have very clear and written protocol developed for vulnerable clients (i.e., what is appropriate for them to use on the self-portal to ensure they aren't being taken advantage of, extra security etc).
  - There may be spousal where the dominant spouse is reporting; how can we protect the non-dominant client?
    - *Passwords and security stages/levels of security to protect the vulnerable*
    - *May require a worker to verify certain actions to ensure client did intentionally*
- Be clear on the vision of the portal. The portal is one of the channels for clients to receive service.

**Other considerations:**

- Be careful on what we are assuming regarding our clients capabilities regarding their abilities with technology
- How will the ministry handle situations where the client submits a form on the portal and it is filled out incorrectly?
- What will be the response time for questions that are asked on the self portal (i.e., written responses). Will there be a delay?
- Suggest piloting the self serve portal.
- Need to consider resources for managing the portal. The ministry should not reallocate staff to the portal. They need to hire additional staff, as there isn't enough staff for the current channels already.
- Concerns about being too impersonal. Needs to be a balance, as there is a huge benefit in still having conversations with clients, as sometimes clients don't really know what they want, and it comes out by having a conversation.
- Considering linking written responses to other publications (i.e., Your Welfare Right). Might want to consider connecting with Penny from POVNET as they are planning a session with advocates in January.

## Advocate Consultation Live Meeting with Tish Lakes

**We want and value client feedback. What would you recommend to engage clients? How should the ministry engage with clients?**

- Live meeting and conference call format worked very well (visual, etc.).
- It would be interesting to contact a large organization, like BC Coalition, to identify clients for participation in feedback sessions.
- Consider approaching advocacy group, and asking them to participate in the client engagement. Advocates would recommend clients with a range of barriers to ensure we get a wide spectrum of feedback that represents our caseload.
- Ensure we get feedback from client groups that represents our caseload (i.e., people with head injuries, ESL, multiple barriered clients etc)

**Possible Barriers – What barriers do you think clients would foresee?**

- Access to computers – clients then go to advocates or library
  - Additional pressure on community agencies
  - Ensure ministry doesn't reference resources that don't exist. Library would be a good resource.
- Clients might abuse the communication on the self portal (i.e., continuously contact the ministry with questions)
- Written responses are tricky (Residential Tenancy Branch struggles with this issue). Errors happen. What clients might do with an error that they receive in writing through the portal?
- People may confuse ministries/responsibilities (MSD may get RTB questions)
- Online is impersonal.

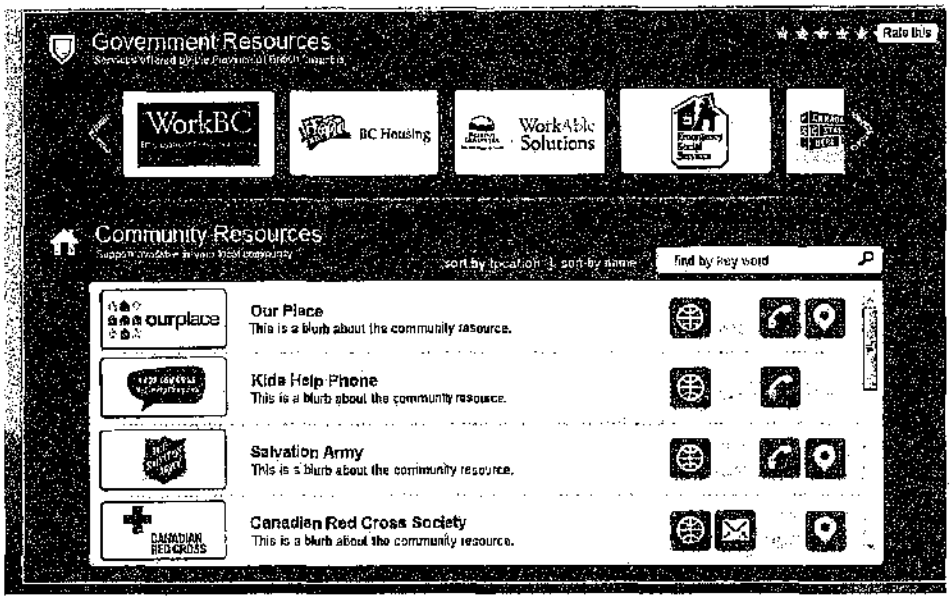
**How can we help clients overcome these barriers? What supports do we need to offer?**

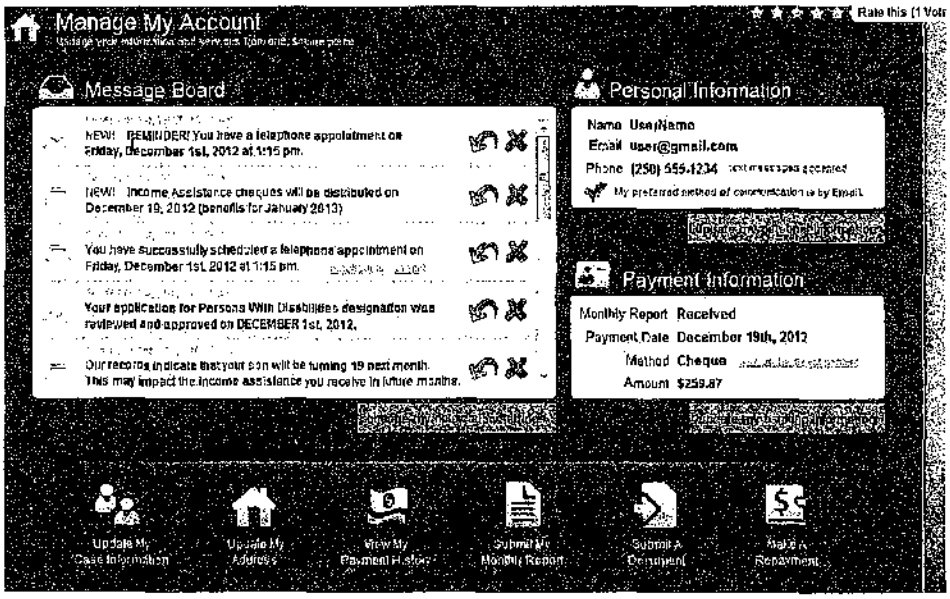
- Support from ministry and advocates
- Supports for English as a second language
- Use different forms of communication (i.e. head injury individuals prefer written information)
- Handouts are helpful (like *Your Welfare Rights* brochure)

**Anticipated Questions/Concerns from Stakeholders:**

- There will be questions with regard to expectations for technology (what is needed for access etc.)
- If a form is available online (through client portal), what are the expected response timelines?
- Need to ensure client is not directed to a computer to access a form
- Need to be careful with written questions. Usually the initial question isn't actually the intended question, which is where a phone conversation is helpful.
- Stakeholders will want additional staffing to manage/support client portal (not taking away from existing staffing/service support)

## Advocate Consultation Live Meeting with Tish Lakes



**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | D'Gal, Judy MSD:EX |
| **Sent:** | Thursday, January 10, 2013 4:11 PM |
| **To:** | 'mhadvocate@dewc.ca'; 'povpost@bccpd.bc.ca'; 'oars@telus.net'; 'advocate@bccpd.bc.ca'; 'Maureen.st.louis@sharesociety.ca'; 'acharlton_sos@vrsa.ca'; 'award@clasbc.net'; 'Epritchard@bcpiac.com'; 'ssmith@mosaicbc.com'; 'jjanda@sourcesbc.ca'; 'ksutherland@thekettle.ca'; 'Michele.Sutherland@bccancer.bc.ca'; 'Iris.Solorzano@options.bc.ca'; 'Sally.White@vast-vancouver.ca'; 'ddufresne@firstunited.ca'; 'fmaclellan@mpa society.org'; s.22 'simone_maxwell@hotmail.com'; 'natasha.cornwallaceEFS@elizabethfry.com'; 'Kim.Irving@elizabethfry.com'; 'robynk@shiloh-6ave.net' |
| **Cc:** | Archer, Terri MSD:EX; Turner, Colleen P MSD:EX; Cross, Elaine MSD:EX; Brown, Trent D MSD:EX; Lofthouse, Jean C MSD:EX; Bandechha, Pardip MSD:EX; D'Gal, Judy MSD:EX |
| **Subject:** | Channel Strategy Follow Up and Feedback Request |
| **Attachments:** | PDF Channel Strategy .pdf |

Hello all,

I want to extend my thanks for participating in our service delivery feedback session this week.

As promised, I have attached a copy of the powerpoint slides. As well, my e-mail address is judy.dgal@gov.bc.ca, or in your region, please feel free to contact Jean Lofthouse, Community Relations and Service Quality Manager at jean.lofthouse@gov.bc.ca.

As we mentioned at the session, **we would appreciate additional advocate feedback** (your recommendations and considerations) to assist us in planning for upcoming consultations with our mutual clients. The consultation is intended to cover the same topics as the session you attended – i.e., seeking feedback on current service delivery effectiveness, sharing information about the ministry's Channel Strategy and asking for clients to provide feedback on the demo of the online self serve portal.

I would appreciate if you could provide your feedback to pardip.bandechha@gov.bc.ca **by end of the day on Tuesday, January 15, 2013**. My apologies in advance for the short timeline of this request.

Thank you again for your valued participation. We look forward to continuing our collaborative dialogue at the local, regional and provincial levels, as well as providing you regular updates on our progress with the Channel Strategy initiative.

Judy D'Gal
Director, Implementation and Stakeholder Relations
Regional Operations, Regional Services Division
Ministry of Social Development
Telephone: (250) 387-9271; Facsimile: (250) 952-6450
E-mail: judy.dgal@gov.bc.ca

# Channel Strategy Project

## January 2013

BRITISH COLUMBIA
Ministry of Social Development

# Opening

- Welcome and Opening Remarks
- Your Facilitators:
  - Elaine Cross, Senior Manager, Learning Services
  - Judy D'Gal, Director, Implementation and Stakeholder Relations
- Introductions
- Approval of Agenda
- Ground Rules

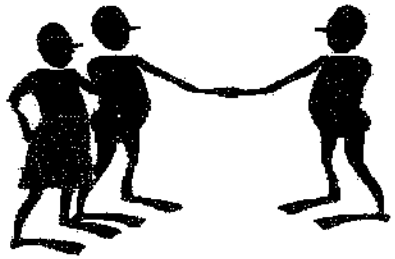
## Ground Rules

- To seek to understand
- To be empathetic and practice non-judgmental listening
- To ask clarifying questions
- To share the dialogue
- To being committed to process and outcomes
- To agree to disagree, if needed
- All information and knowledge shared in this meeting will be treated as "Without Prejudice"*.

**Note:** *"Without Prejudice" offers the protection of privilege to participants. It means that the information exchanged during this proceeding will not be used in any future proceedings regarding the issues unless this same information can be discovered through other means.*

## Introductions

- Please share your:
  - Name
  - Organization you are representing



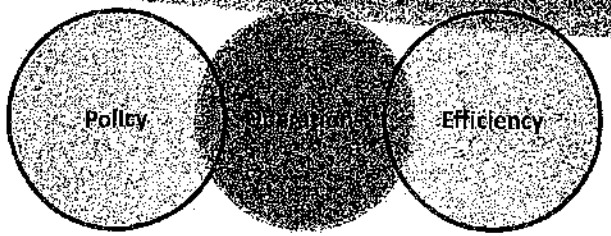
## Our Agenda

| | |
|---|---|
| • Opening Remarks and Introductions | 9:00 – 9:20 |
| • Overview of Channel Strategy Project | 9:20 – 9:30 |
| • Participant Sharing: Roles/Experiences/Examples | 9:30 – 10:00 |
| ***BREAK*** | 10:00 – 10:15 |
| • Possible Future Channel Enhancements | 10:15 – 12:00 |
| ***Lunch*** | 12:00 – 12:50 |
| • Brainstorming Groups | 12:50 – 2:00 |
| • Prioritizing Groups | 2:00 – 2:30 |
| • Report Out on Key Opportunities Identified | 2:30– 2:40 |
| • Next Steps | 2:40 – 3:00 |
| • End of Session | 3:00 |

## *Service Delivery As We Now Know It*

- The ministry currently provides a variety of options to citizens to access information, assistance and services. These channels and services provided by ministry staff include:
  - internet/online, telephone, face-to-face offices, mail, fax and e-mail requests, after hours unit provides access for urgent needs, outreach and integration services provided by specialised staff and Trusted Third Party partners.
- The Ministry of Social Development currently serves approximately 180,000 clients
- In 2011, the ministry processed 77,494 applications
- In April 2012, the ministry implemented Phase 2 of the Integrated Case Management system and the new Employment Program of BC

## What Have We Done Recently?




- Improved timelines for reconsiderations
- Self Serve Assessment and Application enhancements
- Optional survey introduced for applicants to monitor client satisfaction
- Hours of Contact changes
- Improved telephone service response times
- Updated Health Assistance Branch client correspondence – plain language

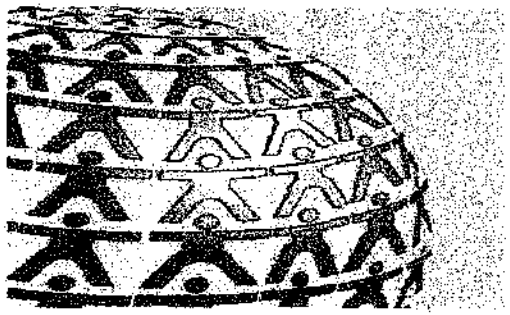
## What Are Our Service Delivery Challenges?

- A number of service delivery pressures exist, including:
  - long telephone wait times, especially during peak times
  - a significant proportion of telephone calls dropped resulting in repeat client follow-ups and long line ups at offices
  - delays in responsiveness to client requests

- Increased number of service requests

## We want to hear from you!

- Please describe:
  - Your client base/role(s)
  - Any issues related to current service delivery channels
  - Your first-hand experiences with ministry clients, staff, policies, practices and other advocates as they relate to service delivery
  - Opportunity to share what is "tricky"



# BREAK

## Channel Strategy: What's Next in Service Delivery?

- The goals of the Channel Strategy are:
  - Broadened client access to services through multi-channel service delivery
  - Maximize efficiency
  - Integrate with government priorities and channels
  - Continuous improvement to ensure effectiveness and to consider future technological advances
- It is timely to consider ways to transform service delivery through the development of a service delivery Channel Strategy.
- The Channel Strategy envisions a technology-enabled, integrated contact system for telephone and web application services to complement existing and future channels

## How Do We Move Forward?

- Understand the needs of our clients to helps us to deliver programs and supports that best address those needs
- Identify the gaps between what clients expect or need from the organization and the service they are actually receiving
- Initiate a primary consultation process to receive feedback about our current service delivery channels, and to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel
- Launch focus groups to obtain feedback on client consultation, as well as perceptions around client needs and supports
- Ensure the development of new channels, user-centred design research and testing will adopt corporate best practices and be informed by user insights to support service delivery design

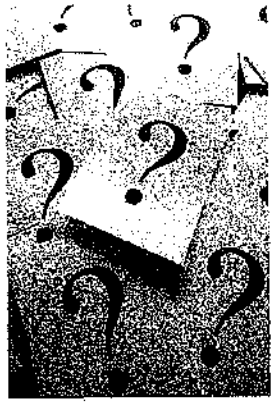
## Possible Future Channel Enhancements

- Overview of possible future channel options and service delivery enhancements
- Demo: Online Self Serve Portal

## What Can We Achieve Today?

- Feedback on the online Self-Serve Portal: scope, functionality and support

**We Value Your Feedback!**



# LUNCH

## *Brainstorming – Let's Get Started!*

- Please separate into 4 groups:

- Each group will work together to identify:
  - needs/gaps/opportunities for future service delivery enhancements for consideration i.e., potential benefits/impacts, what's working, what's not, what's tricky

- Considerations for client consultation and information collection

## Prioritizing and Report Out

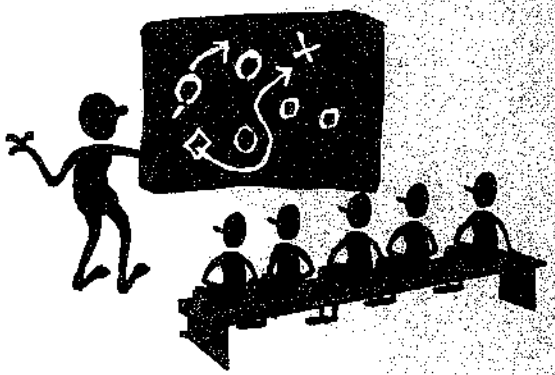
- Review of report out
- Please separate into 4 groups and rotate to each of the 4 channel options. From the ideal perspective, what would be critical to the success of the developing/enhancing each channel.
  - prioritize your "top 3" priorities
  - identify critical success factors for each of these 3 priorities
- Report out – key opportunities identified

# Next Steps

- What's next?
- How will we use this information?

## Reflections

- How would you describe your experience today?
- Was this a useful approach?
- Suggestions/comments



## Closing

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Thursday, March 7, 2013 12:25 PM |
| **To:** | 'mhadvocate@dewc.ca'; 'povpost@bccpd.bc.ca'; 'oars@telus.net'; 'advocate@bccpd.bc.ca'; 'Maureen.st.louis@sharesociety.ca'; 'acharlton_sos@vrsa.ca'; 'award@clasbc.net'; 'Epritchard@bcpiac.com'; 'ssmith@mosaicbc.com'; 'jjanda@sourcesbc.ca'; 'ksutherland@thekettle.ca'; 'Michele.Sutherland@bccancer.bc.ca'; 'Iris.Solorzano@options.bc.ca'; 'Sally.White@vast-vancouver.ca'; 'ddufresne@firstunited.ca'; 'fmaclellan@mpa-society.org'; s.22 'simone_maxwell@hotmail.com'; 'natasha.cornwallaceEFS@elizabethfry.com'; 'Kim.Irving@elizabethfry.com'; 'robynk@shiloh-6ave.net' |
| **Cc:** | Brown, Trent D MSD:EX; Lofthouse, Jean C MSD:EX; D'Gal, Judy MSD:EX; Bandechha, Pardip MSD:EX |
| **Subject:** | Channel Strategy Jan. 8th Advocate Session follow-up |
| **Attachments:** | Final Summary Notes - Jan 8 Region 2 and 3 Advocacy Organization Feedbac....pdf |

Hello all,

In follow-up to the face-to-face service delivery feedback session we had in January between the Ministry of Social Development and Income assistance advocates, attached is a copy of the summary notes from the session, as promised.

As we move forward with condensed feedback sessions in the other regions (by conference call and Microsoft Live Meeting), these notes are foundational for our discussions with advocates across the province.

We want to thank you again for your valued participation. We look forward to continuing our collaborative dialogue at the local, regional and provincial levels, as well as providing regular updates on our progress with the Channel Strategy initiative.

*Terri Archer*
A/Director, Implementation and Stakeholder Relations (March 4-8) for Judy D'Gal
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful
- Channels and accommodation not available (available ministry resources vs. actual client need)
    - Provincial interpretation and accommodation services not being offered despite policy
    - Need more resources on the frontline
    - Outreach is good when available
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency and repeating story)
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
    - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
    - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
    - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., immigrants, refugees and certain segments of caseload)
    - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)
- Move to 1 800/1 866 – misdirected calls doesn't work
- Must use phone i.e., some clients don't have phones, which is frustrating
- Call centre across regions are not integrated

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Internet / Online Channel:**

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application tool
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants – lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application – privacy – times out after 45 minutes - the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
    - When finishing the online application, clients are not sure when they are finished
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents – some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call
- Clients will go away, without receiving service, due to frustration

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (Integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure – timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know clients status – and have client to apply again which is unnecessary effort

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
  - Concerns regarding not requiring signature
  - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
  - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
  - Will this be clear if a person is applying online?
  - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
  - How will this be resourced? (do not use existing resources needed to support other channels)
  - Integration with ICM system – will they have another system to search? needs to be integrated
  - Don't launch until other issues related to missing applications and other documents are remedied
  - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies
- Need to ensure clients have opportunities to be trained by the ministry on how to use this

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone* | • Connected to ICM |
| • Access to Supervisor/CRSC** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ***** | • Long wait time |
| • Not fully accessible***<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones **** |
| • At times – cant do –send email instead | • Prompts changed |
| • Things should be done by workers not CRSC | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service******* | • Doesn't work if client doesn't have access to a phone |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of Information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option * | • More information for clients upfront at application** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 –3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources, skill set, self care as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for FSL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)<br>o Family Maintenance Worker appointments<br>o Interpretation | • Advocate can easily get an appointment when requested ** |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response****** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff*******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province) |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone ******<br>o Systemic issue |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need – face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand**
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ******** | • Web Page - What web page? The ministry home page (Internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in |

| | |
|---|---|
| often not accurate and can discourage some clients that need support | the regulation vs. a substantive change |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| ▪ Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | ▪ Online application needs more alerts/graphics ***** |
| ▪ Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | ▪ Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| ▪ Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | ▪ Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/level of completion |
| ▪ Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | ▪ Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| ▪ Use online application data to skip the employment questions – will make the application more relevant and shorter | ▪ Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| ▪ Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | ▪ Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

**Evans Locker, Ann SDSI:EX**

**From:** Brown, Trent D MSD:EX
**Sent:** Monday, December 17, 2012 3:39 PM
**To:** Bandechha, Pardip MSD:EX
**Subject:** FW: Fraser Region invites:

Pardip

I invited the following agencies/People – let me know if there is more room and I can attempt to invite more - I have many I can draw from if necessary.

| Name | Agency | Email |
|---|---|---|
| Sorya Vanbuskirk | Sources: Advocacy Programs Manager | svanbuskirk@sourcesbc.ca |
| Debbie Hogan & S. Thorne | Kla-how-eya Aboringial Centre | dhoggan@sacsbc.org<br>sthorne@sacsbc.org |
| Ellen Boyes | Abbotsford & Chilliwack Comm Services | ellen.boyes@abbotsfordcommunityservices.com |
| Roxanne MacDonald | SHARE Community Services – TriCities | r.macdonald@sharesociety.ca |
| Connie Hong & Iris Solorzano | Options – Settlement Workers | connie.hong@options.bc.ca<br>iris.solorzano@options.bc.ca |
| Bridget Witzel | Red Cross - Humanitarian Issues Program | Brigitte.Witzel@redcross.ca |
| Meaghan White | Keys: Housing and Health Solutions | director2@keyssolutions.org |
| Shelley Pennington | Cancer Care Resources Social Worke | SPennington-02@bccancer.bc.ca |
| Bonnie Moriarity | Director - Homelessness Initiaitves – E. Fry | Bonnie.Moriarty@elizabethfry.com |

Attached is the invitation sent:

*Trent Brown*
Manager of Community Relations & Service Quality
Hiring Manager - Fraser Region
Ph: 604-586-2947, Cell: 604-351-4368, Fax: 604-586-2681

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Brown, Trent D MSD:EX |
| **Sent:** | Monday, December 17, 2012 2:57 PM |
| **Cc:** | 'Pardip.Bandechha@gov.bc.ca.' |
| **Subject:** | MSD Invitation to Discussion Forum - Jan. 8, 2013 |

Good Afternoon Fraser Region Advocates, stakeholders and Community Partners.

The Ministry of Social Development invites local advocates to a face-to-face discussion about service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. We are pleased to invite you to participate at an upcoming discussion forum in Vancouver (note: we are also planning other subsequent condensed forums across the province, predominantly by Live Meeting). For the face-to-face session, we will need to balance limited seating with broad representation.

The **purpose of the session** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

Discussion topics include an opportunity for advocates to share their experiences with our current service delivery channels, provide feedback to identify new service delivery enhancement opportunities, and to view a demo of a new service delivery channel option the ministry is exploring.

**The meeting details are as follows:**

**Date:** Tuesday, January 8, 2013

**Time:** 9:00 am – 3:00 pm (lunch will be provided)

**Location:** Ministry of Social Development Learning Centre, 18th floor – 1050 West Pender Street, Vancouver, BC *(Training Room 1)*

**Please RSVP by December 28th if you are interested in attending this face-to-face session** by contacting Pardip Bandechha at (250) 387-2889 or by e-mail at Pardip.Bandechha@gov.bc.ca.

We are unable to provide travel expenses other than lunch, but would ask that those planning to attend include any special dietary restrictions in your reply so that we can accommodate your specific dietary needs.

A draft agenda and venue details, including driving directions, have been included with this invitation.

Thank you for considering this opportunity, and we look forward to your feedback.

*Trent Brown*
Manager of Community Relations & Service Quality
Hiring Manager - Fraser Region
Ph: 604-586-2947, Cell: 604-351-4368, Fax: 604-586-2681

For:
Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

*This message is confidential and may not be disclosed to anyone without the expressed written consent of the sender*

**Evans Locker, Ann SDSI:EX**

**From:** Archer, Terri MSD:EX
**Sent:** Monday, December 17, 2012 2:30 PM
**To:** 'Tish Lakes'
**Cc:** Bandechha, Pardip MSD:EX
**Subject:** FYI: MSD Invitation to Discussion Forum - Jan. 8, 2013

Hello Tish, here is the email invitation that is going/has gone to advocates in Regions 2 and 3 who deal directly with our clients. Space is limited to 25 seats maximum to ensure a manageable and comfortable session. It will be interesting to see the response/interest. As noted, there will be subsequent condensed sessions to follow. We hope you can make it.

Cheers.

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

---

The Ministry of Social Development invites local advocates to a face-to-face discussion about service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. We are pleased to invite you to participate at an upcoming discussion forum in Vancouver (note: we are also planning other subsequent condensed forums across the province, predominantly by Live Meeting). For the face-to-face session, we will need to balance limited seating with broad representation.

The **purpose of the session** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

Discussion topics include an opportunity for advocates to share their experiences with our current service delivery channels, provide feedback to identify new service delivery enhancement opportunities, and to view a demo of a new service delivery channel option the ministry is exploring.

**The meeting details are as follows:**

**Date:** Tuesday, January 8, 2013

**Time:** 9:00 am – 3:00 pm (lunch will be provided)

**Location:** Ministry of Social Development Learning Centre, 18th floor – 1050 West Pender Street, Vancouver, BC *(Training Room 1)*

**Please RSVP by December 28th if you are interested in attending this face-to-face session** by contacting Pardip Bandechha at (250) 387-2889 or by e-mail at Pardip.Bandechha@gov.bc.ca.

We are unable to provide travel expenses other than lunch, but would ask that those planning to attend include any special dietary restrictions in your reply so that we can accommodate your specific dietary needs.

A draft agenda and venue details, including driving directions, have been included with this invitation.

Thank you for considering this opportunity, and we look forward to your feedback.

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

*This message is confidential and may not be disclosed to anyone without the expressed written consent of the sender*

**DRAFT AGENDA – F2F (Regions 2 & 3)**

1. **Opening Remarks and Introductions** *(Elaine)*.....**9:00 – 9:20**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of Session*
2. **Overview of Channel Strategy Project** *(Judy)*.....**9:20 – 9:30**
   - *Overview of current service delivery channels "as we know it" and "our current challenges" (Judy)*
3. **Participant Sharing: Roles/Experiences/Examples** *(Elaine)*.....**9:30 – 10:00**
   - *Opportunity to share what is tricky with the current service delivery channels*

**Break**.....**10:00 –10:15**

4. **Possible Future Channel Enhancements** *(Judy/Colleen)*.....**10:15 – 12:00**
   - *Overview of possible future channel options and service delivery enhancements (Judy)*
   - ***Demo of self serve portal*** *(Colleen Turner)*
   - *Seek feedback on scope, functionality and support for portal (Judy)*

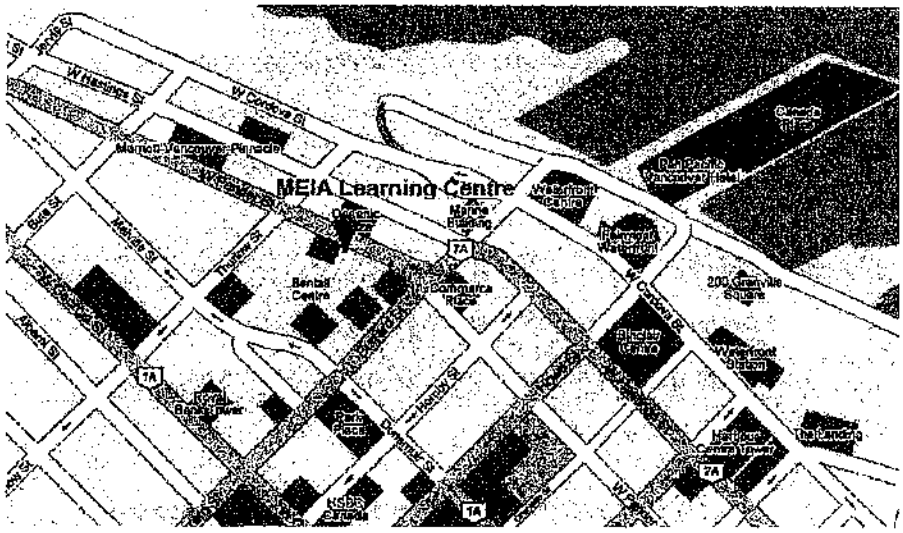
**Lunch**.....**12:00 – 1:00**

5. **Brainstorming Groups** *(Elaine)*.....**1:00 – 2:00**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (10 minutes)*
   - *Participants work in smaller groups to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email etc); Each group works together to identify opportunities/future **enhancements for consideration**; What's working, what's not… (10 minutes each topic = 40 minutes)*
   - *Identification of opportunities to consult with clients (15 minutes)*
6. **Prioritizing Groups**.....**2:00 –2:30**
   - *Review of Report Out (additional comments) (Elaine) (10 minutes)*
   - *Participants prioritize top 3 opportunities (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (10 minutes)*
7. **Report Out on Key Opportunities Identified** *(Elaine)*.....**2:30– 2:40**
8. **Next Steps**.....**2:40 – 3:00**
   - *Next steps – How do we keep the dialogue going? (Judy)*
   - *Closing remarks (Judy)*

**End of Session**.....**3:00**

**Ministry of Employment and Income Assistance**
**Learning Centre**
**18/F., 1050 West Pender Street**
**Vancouver, British Columbia V6E 3S7**
**Phone: (604) 775-2005**
**Fax: (604) 775-2075**

The MEIA Learning Centre is located one building in from the corner of Burrard Street and West Pender Street in downtown Vancouver. Please refer to the following map for our location:




You can get driving directions to the Learning Centre by clicking on the following link:

http://www.google.ca/local?f=q&hl=en&q=1050+West+Pender+Street,+Vancouver,+BC&ie=UTF8&ll=49.286395,-123.118973&spn=0.006508,0.021458&om=1

**DIRECTIONS**

**Directions from the Airport:**

- Follow the signs to Vancouver City Center over the Arthur Laing Bridge and onto Granville Street.
- Take Granville north through the city and over the Granville Street Bridge.
- Take the Seymour Street exit off the Granville Street Bridge.
- Follow Seymour Street to West Pender Street and turn left.
- The Learning Centre is at 1050 West Pender, 4 blocks ahead on the left.

*Estimated Time: about 35 minutes depending on traffic conditions.*

**Directions from Tsawwassen Ferry Terminal:**

- Follow the signs to Vancouver City Centre via Highway 17 North.
- Highway 17 merges with Highway 99 North. Take Highway 99 through the Massey Tunnel and over the Oak Street Bridge.
- Follow Oak Street up to 41st Avenue and turn left.
- Follow 41st Avenue to Granville Street and turn right
- Follow Granville Street north through the city and over the Granville Street Bridge.
- Take the Seymour Street exit off the Granville Street Bridge.
- Follow Seymour Street to West Pender Street and turn left.
- The Learning Centre is at 1050 West Pender, 4 blocks ahead on the left.

*Estimated Time: about 45 minutes depending on traffic conditions*

**From the north:**

- Enter the downtown area over the Lions Gate Bridge and through Stanley Park, coming out on Georgia Street.
- Georgia splits into Georgia and West Pender. Veer left onto West Pender.
- The Learning Centre is at 1050 West Pender, 5 blocks ahead on the right.

**From the East:**

- Follow Highway 1 (Trans Canada) and exit at Hastings Street.
- Take Hastings west through the city and into the downtown area.
- Turn left on Howe Street.
- Turn right on West Pender Street.
- The Learning Centre is at 1050 West Pender, 2 blocks ahead on the left.

**To the Airport:**

- Go east on West Pender Street.
- Turn right on Howe Street and go over the Granville Street Bridge, veering left onto the Granville Street Exit.
- Take Granville Street south through the city and follow the signs to the airport over the Arthur Laing Bridge and to the terminal.

*Estimated Time: about 30 minutes depending on traffic conditions*

**To Tsawwassen Ferry:**

- Go east on West Pender Street.
- Turn right on Howe Street and go over the Granville Street Bridge, veering left onto the Granville Street Exit.
- Take Granville south through the city and turn left on 70th Avenue.
- Turn right on Oak Street and go over the Oak Street Bridge.
- Oak Street turns into Highway 99. Take this through the Massey Tunnel and then take the 2nd exit (Hwy 17) marked "Tsawwassen Ferry". Follow the signs to the terminal.

*Estimated Time: about 30 minutes depending on traffic conditions*

**To Horseshoe Bay (Nanaimo) Ferry:**

- Go West on Pender Street.
- Pender Street merges with West Georgia Street.
- Follow Georgia through Stanley Park and over the Lions Gate Bridge.
- On the bridge follow signs to Highway 1 West. Follow the signs to Horseshoe Bay Terminal.

*Estimated Time: about 20 minutes depending on traffic conditions*

**PARKING**

There is no free parking available at the Learning Center. If you are driving, you can either park on the street (2 hr limit), or at one of the following paid parking lots in the vicinity:

- 1040 West Pender – All Day Parking $17.50 *(Early Bird $15.00 before 8:00 am)*
- 1078 West Pender (Metro Parking) – $11.00 All Day
- 1130 West Pender (Thurlow & Pender) – $15.00 All Day
- 1133 Melville – All Day Parking $12.50 *(Early Bird $10.00 before 9:00 am)*
- 1138 Melville – All Day Parking $12.00 *(Early Bird $10.00 before 8:30 am)*

**OTHER TRANSPORTATION**

**By Public Transit**

Burrard SkyTrain Station is located in the Bentall Centre, next door to the MEIA Learning Centre. Please check the TransLink website for fares and schedules.

TransLink – Buses, SkyTrain, SeaBus and West Coast Express

**By Float Plane**

There are several air services operating out of Coal Harbour in close proximity to the MEIA Learning Center. The terminal for Harbour Air, West Coast Air, and Baxter Air is a five minute walk from MEIA Learning Services. Please see their websites for fares, schedules, and terminal information.

Harbour Air – 1-800-665-0212
West Coast Air - 1-800-347-2222
Baxter Air – 1-800-661-5599

**By HeliJet**

The terminal is a ten minute walk from MEIA Learning Services. Please check the website for fares, schedules, and terminal information.

HeliJet – 1-800-665-4354

**By Passenger Coach**

The Pacific Terminal for Greyhound and other passenger coach services is located at the corner of Main Street and Terminal Avenue, a quick taxi ride from Learning Services.

Pacific Coach Line – 1-800-661-1725
Greyhound – 604-482-8747 / 1-800-661-8747

**Other Transportation Links**

YVR Airporter – Shuttle between Vancouver International Airport and Downtown hotels (pickup/drop off at Renaissance Harbourside Hotel)
BC Ferries – Ferries between Vancouver Island and the Lower Mainland

**ACCOMMODATION**

The following is a list of hotels in the vicinity:

**Day's Inn Vancouver Downtown**
921 Pender Street West
Vancouver, BC V6C 1M2
Telephone: 604-681-4335
Fax: 604-681-7808
http://www.daysinnvancouver.com/

**Fairmont Waterfront**
900 Canada Place
Vancouver, BC V6C 3L5

Telephone: 604-691-1991
Fax: 604-691-1999
http://www.fairmont.com/waterfront/

**Hotel Le Soleil**
567 Hornby Street
Vancouver, BC V6C 2E8
Telephone: 604-632-3000 / 1-877-632-3030
Fax: 604-632-3001
http://www.lesoleilhotel.com/

**Hyatt Regency Vancouver**
655 Burrard Street
Vancouver, BC V6C 2R
Telephone: 604-683-1234
Fax: 604-689-3707
http://www.vancouver.hyatt.com/hyatt/hotels/index.jsp

**Pan Pacific Vancouver**
300 - 999 Canada Place
Vancouver, BC V6C 3B5
Telephone: 604-662-8111
Fax: 604-891-2861
http://www.panpacific.com/

**Renaissance Vancouver Hotel Harbourside**
1133 Hastings Street Wesy
Vancouver, BC V6E 3T3
Telephone: 604-689-9211
Fax: 604.691.2791
http://marriott.com/property/propertypage/YVRRD

**Vancouver Marriott Pinnacle Downtown**
1128 Hastings Street West
Vancouver, BC V6E 4R5
Telephone: 604-684-1128
Fax: 604-639-4027
http://www.vancouvermarriott.com/

Please refer to the hotel room rates at this website:

http://www.pc.gov.bc.ca/travel/Hotels/AccommodationListing/2006/Downtown%20Vancouver.htm.

The Ministry of Social Development invites local advocates to a face-to-face discussion about service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. We are pleased to invite you to participate at an upcoming discussion forum in Vancouver (note: we are also planning other subsequent condensed forums across the province, predominantly by Live Meeting). For the face-to-face session, we will need to balance limited seating with broad representation.

The purpose of the sessions is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

Discussion topics include an opportunity for advocates to share their experiences with our current service delivery channels, provide feedback to identify new service delivery enhancement opportunities, and to view a demo of a new service delivery channel option the ministry is exploring.

**The meeting details are as follows:**

**Date:** Tuesday, January 8, 2013

**Time:** 9:00 am – 3:00 pm (lunch will be provided)

**Location:** Ministry of Social Development Learning Centre, 18th floor – 1050 West Pender Street, Vancouver, BC

**Please RSVP by December 20th if you are interested in attending this face-to-face session** by contacting Pardip Bandechha at (250) 387-2889 or by e-mail at Pardip.Bandechha@gov.bc.ca. We are unable to provide travel expenses other than lunch, but would ask that those planning to attend include any special dietary restrictions in your reply so that we can accommodate your specific dietary needs.

A draft agenda and venue details, including driving directions, have been included with this invitation.

Draft Agenda for R2 R3 F2F Foc...

MSD Learning Centre.pdf

Thank you for considering this opportunity, and we look forward to your feedback.

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

*This message is confidential and may not be disclosed to anyone without the express written consent of the sender*

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Monday, December 17, 2012 1:25 PM |
| **To:** | Brown, Trent D MSD:EX; Hare, Kashmir K MSD:EX |
| **Cc:** | Lofthouse, Jean C MSD:EX; Lauzon, Michele MSD:EX; Bandechha, Pardip MSD:EX; D'Gal, Judy MSD:EX; Cross, Elaine MSD:EX |
| **Subject:** | MSD Invitation to Discussion Forum - Jan. 8, 2013 |

Hello Trent and Kashmir, as discussed, please send this invitation out to your regional advocates who provide direct service to our clients.

We will also phone some of the key organizations personally to re-iterate this invitation (i.e. BC Coalition, CLAS, PovNet, and BC PIAC). Please note we have extended the RSVP response date to Dec. 28th. Thank you.

---

The Ministry of Social Development invites local advocates to a face-to-face discussion about service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. We are pleased to invite you to participate at an upcoming discussion forum in Vancouver (note: we are also planning other subsequent condensed forums across the province, predominantly by Live Meeting). For the face-to-face session, we will need to balance limited seating with broad representation.

The **purpose of the session** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

Discussion topics include an opportunity for advocates to share their experiences with our current service delivery channels, provide feedback to identify new service delivery enhancement opportunities, and to view a demo of a new service delivery channel option the ministry is exploring.

**The meeting details are as follows:**

**Date:** Tuesday, January 8, 2013

**Time:** 9:00 am – 3:00 pm (lunch will be provided)

**Location:** Ministry of Social Development Learning Centre, 18th floor – 1050 West Pender Street, Vancouver, BC *(Training Room 1)*

**Please RSVP by December 28th if you are interested in attending this face-to-face session** by contacting Pardip Bandechha at (250) 387-2889 or by e-mail at Pardip.Bandechha@gov.bc.ca.

We are unable to provide travel expenses other than lunch, but would ask that those planning to attend include any special dietary restrictions in your reply so that we can accommodate your specific dietary needs.

A draft agenda and venue details, including driving directions, have been included with this invitation.

Thank you for considering this opportunity, and we look forward to your feedback.

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

*This message is confidential and may not be disclosed to anyone without the expressed written consent of the sender*

## DRAFT AGENDA – F2F (Regions 2 & 3)

1. **Opening Remarks and Introductions** *(Elaine)*.....**9:00 – 9:20**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of Session*

2. **Overview of Channel Strategy Project** *(Judy)*.....**9:20 – 9:30**
   - *Overview of current service delivery channels "as we know it" and "our current challenges" (Judy)*

3. **Participant Sharing: Roles/Experiences/Examples** (*Elaine*).....**9:30 – 10:00**
   - *Opportunity to share what is tricky with the current service delivery channels*

**Break**.....**10:00 – 10:15**

4. **Possible Future Channel Enhancements** *(Judy/Colleen)*.....**10:15 – 12:00**
   - *Overview of possible future channel options and service delivery enhancements (Judy)*
   - ***Demo of self serve portal*** *(Colleen Turner)*
   - *Seek feedback on scope, functionality and support for portal (Judy)*

**Lunch**.....**12:00 – 1:00**

5. **Brainstorming Groups** (*Elaine*).....**1:00 – 2:00**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (10 minutes)*
   - *Participants work in smaller groups to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email etc); Each group works together to identify opportunities/future **enhancements for consideration**; What's working, what's not... (10 minutes each topic = 40 minutes)*
   - *Identification of opportunities to consult with clients (15 minutes)*

6. **Prioritizing Groups**.....**2:00 –2:30**
   - *Review of Report Out (additional comments)* (*Elaine*) *(10 minutes)*
   - *Participants prioritize top 3 opportunities (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (10 minutes)*

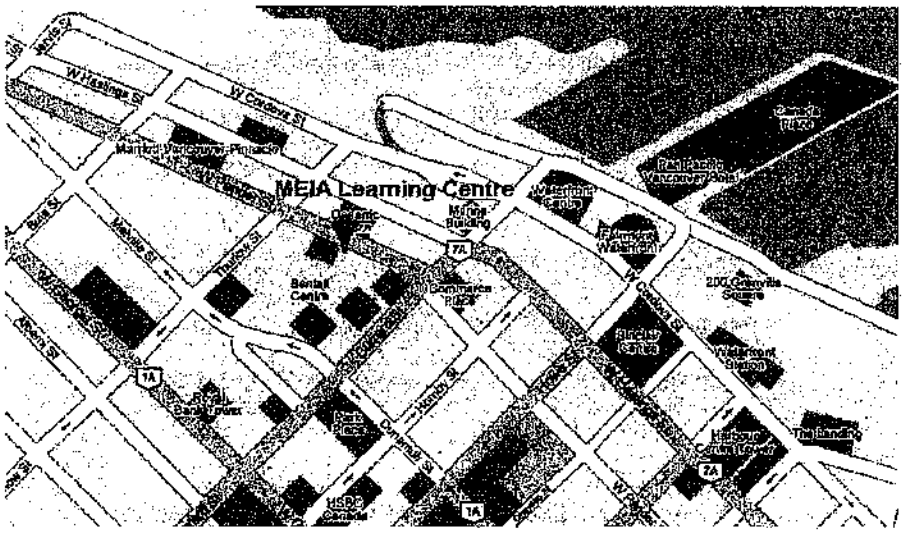
7. **Report Out on Key Opportunities Identified** (*Elaine*).....**2:30– 2:40**

8. **Next Steps**.....**2:40 – 3:00**
   - *Next steps – How do we keep the dialogue going? (Judy)*
   - *Closing remarks (Judy)*

**End of Session**.....**3:00**

**Ministry of Employment and Income Assistance**
**Learning Centre**
**18/F., 1050 West Pender Street**
**Vancouver, British Columbia V6E 3S7**
**Phone: (604) 775-2005**
**Fax: (604) 775-2075**

The MEIA Learning Centre is located one building in from the corner of Burrard Street and West Pender Street in downtown Vancouver. Please refer to the following map for our location:




You can get driving directions to the Learning Centre by clicking on the following link:

http://www.google.ca/local?f=q&hl=en&q=1050+West+Pender+Street,+Vancouver,+BC&ie=UTF8&ll=49.286395,-123.118973&spn=0.006508,0.021458&om=1

**DIRECTIONS**

**Directions from the Airport:**

- Follow the signs to Vancouver City Center over the Arthur Laing Bridge and onto Granville Street.
- Take Granville north through the city and over the Granville Street Bridge.
- Take the Seymour Street exit off the Granville Street Bridge.
- Follow Seymour Street to West Pender Street and turn left.
- The Learning Centre is at 1050 West Pender, 4 blocks ahead on the left.

*Estimated Time: about 35 minutes depending on traffic conditions.*

**Directions from Tsawwassen Ferry Terminal:**

- Follow the signs to Vancouver City Centre via Highway 17 North.
- Highway 17 merges with Highway 99 North. Take Highway 99 through the Massey Tunnel and over the Oak Street Bridge.
- Follow Oak Street up to 41st Avenue and turn left.
- Follow 41st Avenue to Granville Street and turn right
- Follow Granville Street north through the city and over the Granville Street Bridge.
- Take the Seymour Street exit off the Granville Street Bridge.
- Follow Seymour Street to West Pender Street and turn left.
- The Learning Centre is at 1050 West Pender, 4 blocks ahead on the left.

*Estimated Time: about 45 minutes depending on traffic conditions*

**From the north:**

- Enter the downtown area over the Lions Gate Bridge and through Stanley Park, coming out on Georgia Street.
- Georgia splits into Georgia and West Pender. Veer left onto West Pender.
- The Learning Centre is at 1050 West Pender, 5 blocks ahead on the right.

**From the East:**

- Follow Highway 1 (Trans Canada) and exit at Hastings Street.
- Take Hastings west through the city and into the downtown area.
- Turn left on Howe Street.
- Turn right on West Pender Street.
- The Learning Centre is at 1050 West Pender, 2 blocks ahead on the left.

**To the Airport:**

- Go east on West Pender Street.
- Turn right on Howe Street and go over the Granville Street Bridge, veering left onto the Granville Street Exit.
- Take Granville Street south through the city and follow the signs to the airport over the Arthur Laing Bridge and to the terminal.

*Estimated Time: about 30 minutes depending on traffic conditions*

**To Tsawwassen Ferry:**

- Go east on West Pender Street.
- Turn right on Howe Street and go over the Granville Street Bridge, veering left onto the Granville Street Exit.
- Take Granville south through the city and turn left on 70th Avenue.
- Turn right on Oak Street and go over the Oak Street Bridge.
- Oak Street turns into Highway 99. Take this through the Massey Tunnel and then take the 2nd exit (Hwy 17) marked "Tsawwassen Ferry". Follow the signs to the terminal.

*Estimated Time: about 30 minutes depending on traffic conditions*

**To Horseshoe Bay (Nanaimo) Ferry:**

- Go West on Pender Street.
- Pender Street merges with West Georgia Street.
- Follow Georgia through Stanley Park and over the Lions Gate Bridge.
- On the bridge follow signs to Highway 1 West. Follow the signs to Horseshoe Bay Terminal.

*Estimated Time: about 20 minutes depending on traffic conditions*

**PARKING**

There is no free parking available at the Learning Center. If you are driving, you can either park on the street (2 hr limit), or at one of the following paid parking lots in the vicinity:

- 1040 West Pender – All Day Parking $17.50 *(Early Bird $15.00 before 8:00 am)*
- 1078 West Pender (Metro Parking) – $11.00 All Day
- 1130 West Pender (Thurlow & Pender) – $15.00 All Day
- 1133 Melville – All Day Parking $12.50 *(Early Bird $10.00 before 9:00 am)*
- 1138 Melville – All Day Parking $12.00 *(Early Bird $10.00 before 8:30 am)*

**OTHER TRANSPORTATION**

**By Public Transit**

Burrard SkyTrain Station is located in the Bentall Centre, next door to the MEIA Learning Centre. Please check the TransLink website for fares and schedules.

TransLink – Buses, SkyTrain, SeaBus and West Coast Express

**By Float Plane**

There are several air services operating out of Coal Harbour in close proximity to the MEIA Learning Center. The terminal for Harbour Air, West Coast Air, and Baxter Air is a five minute walk from MEIA Learning Services. Please see their websites for fares, schedules, and terminal information.

Harbour Air – 1-800-655-0212
West Coast Air - 1-800-347-2222
Baxter Air – 1-800-661-5599

**By HeliJet**

The terminal is a ten minute walk from MEIA Learning Services. Please check the website for fares, schedules, and terminal information.

HeliJet – 1-800-665-4354

**By Passenger Coach**

The Pacific Terminal for Greyhound and other passenger coach services is located at the corner of Main Street and Terminal Avenue, a quick taxi ride from Learning Services.

Pacific Coach Line – 1-800-661-1725
Greyhound – 604-482-8747 / 1-800-661-8747

**Other Transportation Links**

YVR Airporter – Shuttle between Vancouver International Airport and Downtown hotels (pickup/drop off at Renaissance Harbourside Hotel)
BC Ferries – Ferries between Vancouver Island and the Lower Mainland

**ACCOMMODATION**

The following is a list of hotels in the vicinity:

**Day's Inn Vancouver Downtown**
921 Pender Street West
Vancouver, BC V6C 1M2
Telephone: 604-681-4335
Fax: 604-681-7808
http://www.daysinnvancouver.com/

**Fairmont Waterfront**
900 Canada Place
Vancouver, BC V6C 3L5

Telephone: 604-691-1991
Fax: 604-691-1999
http://www.fairmont.com/waterfront/

**Hotel Le Soleil**
567 Hornby Street
Vancouver, BC V6C 2E8
Telephone: 604-632-3000 / 1-877-632-3030
Fax: 604-632-3001
http://www.lesoleilhotel.com/

**Hyatt Regency Vancouver**
655 Burrard Street
Vancouver, BC V6C 2R
Telephone: 604-683-1234
Fax: 604-689-3707
http://www.vancouver.hyatt.com/hyatt/hotels/index.jsp

**Pan Pacific Vancouver**
300 - 999 Canada Place
Vancouver, BC V6C 3B5
Telephone: 604-662-8111
Fax: 604-891-2861
http://www.panpacific.com/

**Renaissance Vancouver Hotel Harbourside**
1133 Hastings Street Wesy
Vancouver, BC V6E 3T3
Telephone: 604-689-9211
Fax: 604.691.2791
http://marriott.com/property/propertypage/YVRRD

**Vancouver Marriott Pinnacle Downtown**
1128 Hastings Street West
Vancouver, BC V6E 4R5
Telephone: 604-684-1128
Fax: 604-639-4027
http://www.vancouvermarriott.com/

Please refer to the hotel room rates at this website:

http://www.pc.gov.bc.ca/travel/Hotels/AccommodationListing/2006/Downtown%20Vancouver.htm.

**Confirmed Advocate Participants:** 21 confirmed advocates
5 ministry staff Elaine Cross, Colleen Turner, Trent Brown, Judy D'Gal and Jean Lofthouse

| Name | Organization | Contact Information | Comments |
|---|---|---|---|
| Liza McDowell | DTES Women's Centre | mhadvocate@dewc.ca | Will be arriving Late |
| Robin Loxtin | BC Coalition of People with Disabilities | povpost@bccpd.bc.ca | |
| Tish Lakes<br>Executive Director | Okanagan Advocacy and Resource Society | oars@telus.net | |
| Annette | BCCPD | advocate@bccpd.bc.ca | |
| Maureen St. Louis<br>Legal Advocate | SHARE Family and Community Services (Port Moody) | Maureen.st.louis@sharesociety.ca | |
| Alexandra Charlton<br>Director | S.O.S. Settlement Orientation Services | acharlton_sos@vrsa.ca | |
| Alison Ward<br>Barrister and Solicitor | Community Legal Assistance Society | award@clasbc.net | |
| Erin Pritchard | BC Public Interest Advocacy Centre | Epritchard@bcpiac.com | |
| Stephanie Smith<br>Paralegal | MOSAIC Legal Advocacy Program | ssmith@mosaicbc.com | |
| Jaspreet Janda | Sources Community Resource Centre | jjanda@sourcesbc.ca | |
| Kris Sutherland<br>Manager | The Kettle Advocacy Service | ksutherland@thekettle.ca | |
| Michele Sutherland MSW, BC | Cancer Agency-FVC | Michele.Sutherland@bccancer.bc.ca | Will be arriving at noon |
| Iris Solorzano<br>Assistant Program Manager | Options Community Services | Iris.Solorzano@options.bc.ca | |
| Sally White | Vancouver Association for Survivors of torture | Sally.White@ vast-vancouver.ca | |
| DeDe Dufresne | First United Advocacy | ddufresne@firstunited.ca | |
| Freda Mac Lellan<br>Advocate, MPA Advocacy | Motivational, Power and Achievement Society (MPA Advocacy) | fmaclellan@mpa-society.org | |
| Saph K. Jheeta | Community of Care for Survivors of Torture | s.22 | |
| Simone Maxwell | Independent Counsellor | simone_maxwell@hotmail.com | |
| Natasha Cornwallace | Elizabeth Gurney House | natasha.cornwallaceEFS@elizabethfry.com | |
| Kim Irving | Elizabeth Gurney House | Kim.Irving@elizabethfry.com | |
| Robyn Kelly | Shiloh-Sixth United Church | robynk@shiloh-6ave.net | |

**Future Sessions:**

- Penny Goldsmith (PovNet) 1-604-876-8638
  penny@povnet.org
  ***Will participate in future session via live meeting. Not available for Jan 8.***

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Bousquet, Jeannine M MSD:EX |
| **Sent:** | Tuesday, February 26, 2013 1:28 PM |
| **To:** | 'Action Committee'; 'Alison'; 'Anne'; 'Brenda'; 'Cindy'; 'Debbie'; 'Don'; 'Elia'; 'Emily'; Fontaine, Jan JAG:EX; 'France Tellier'; 'Gillian'; 'Grace Elliot Nielson'; 'Haixia'; 'Janet Hanuse'; 'Janice'; 'Jennifer'; 'Jennifer'; 'Karen'; 'Karl'; 'Kelly'; 'Michael Coldough'; 'Neil Belanger'; 'Rachel Blaney'; 'Rim'; 'Violet Hayes'; 'Vivienne Gorringe' |
| **Cc:** | Bandechha, Pardip MSD:EX; Archer, Terri MSD:EX; Ruel, Janis M MSD:EX |
| **Subject:** | Invitation for live meeting sessions with advocates |

Hi everybody. The Ministry of Social Development invites local advocates to a live-meeting discussion about our service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. In January, the ministry hosted advocates from Regions 2 & 3 to participate in a face-to-face forum. We are now **pleased to invite you to participate at an upcoming live meeting discussion** to continue building on the feedback we received from advocates that attended the Region 2 & 3 forum.

The **purpose of the sessions** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

**Discussion topics** include an opportunity for advocates to: share their experiences with our current service delivery channels, review the feedback received from Region 2 & 3; identify/prioritize service delivery enhancement opportunities; and to view a demo of a new service delivery channel option the ministry is developing.

The **meeting details** are as follows:

Date: Wednesday, March 6, 2013

Time: 9:00 am – 12:30 pm

Location: By combination of live meeting and conference call

**Please RSVP by Friday, March 1, 2013** if you are interested in attending the live meeting session by contacting Jeannine Bousquet at 250-739-6606 or by e-mail at Jeannine.Bousquet@gov.bc.ca.

A draft agenda and the summary of notes from the January 8th session will be forwarded to participants prior to the meeting, along with the live meeting invitation and conference call details.

Thank you for considering this opportunity, and we look forward to your feedback.

Jeannine Bousquet
*Manager Community Relations and Service Quality*
*Ministry of Social Development*
*108 Richards Street*

*Nanaimo, BC*
*V9R 2S8*
*Phone: 250-739-6606*
*FAX: 250-739-6695*

**Evans Locker, Ann SDSI:EX**

**From:** Harrower, Ian MSD:EX
**Sent:** Thursday, March 14, 2013 9:52 AM
**To:** Bandechha, Pardip MSD:EX; Archer, Terri MSD:EX
**Subject:** FW: Stakeholder engagement

Here is the final participant list, and status as written in red. I am still waiting to hear back from 2 agencies and have sent them e-mail or phone reminders. Thanks.

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 565-4478
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

| | Name | Agency | Community | Phone | E-mail |
|---|---|---|---|---|---|
| 1 | Tara Rogers | Active Support Against Poverty | Prince George | 250 563-6112 | asap@princegeorge.com confirmed |
| 2 | Stacey Tyers | Terrace and District Social Services | Terrace | 250 635-3178 | staceytyers@tdcss.ca confirmed |
| 3 | Bob Busby | South Peace Community Services | Dawson Creek | 250 782-9174 | bbusby@spcrs.ca confirmed |
| 4 | Sylvia Lane | Womens Resource Centre | Fort St John | 250 787-1121 | fsjwrc@telus.net confirmed |
| 5 | Terry Intermela | Prince Rupert Unemployment Action Centre | Prince Rupert | 250 627-8776 | Allowed5@yahoo.ca Sent e-mail request again this am. Am awaiting response- |
| 6 | Bev Collinson | Haida Gwaii Legal Project | Queen Charlotte | 250 559-9042 | Hglegal@haidagwaii.net Left message |
| 7 | Linda | Tamitik Status of Women | Kitimat | 250 632- | Linda.tsw@citywest.ca |

| | | | | | |
|---|---|---|---|---|---|
| | | | | 8787 | confirmed |
| 8 | Penny Rivard | Robson Valley Community Services | McBride/Valemount | 250 569-2266 | pggardens@hotmail.com confirmed |
| 9 | David Dickenson | Upper Skeena Advocacy | Hazelton | 250 842 – 521 8 | david@usclas.com confirmed |

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 565-4478
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

Wednesday, December 12, 2012 (1:30 PM-2:30 PM)

# Service Channel Strategy

**Advocate Consultation Live Meeting**

## Hello Tish, welcome to the Live Meeting session.

## Thank you for your time and interest in this demo and in discussing our service channels

**Dial in:** s.15,s.17
**ID Code:** s.15,s.17

## MSD Participants:

| | |
|---|---|
| **Terri Archer** | Regional Operations |
| **Pardip Bandeccha** | Regional Operations |
| **Colleen Turner** | Information Management Branch *(client online demo)* |

## Meeting Purpose:

**To provide an overview of the Channel Strategy and see the proposed online portal**
**Also, to engage in further discussion around service delivery enhancement considerations and opportunities**

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Thursday, March 14, 2013 8:55 AM |
| **To:** | Bandechha, Pardip MSD:EX |
| **Subject:** | Channel Strategy - Advocate Live Mtg Welcome page (Mar 14 2013 - R4) |
| **Attachments:** | Channel Strategy - Advocate Live Mtg Welcome page (Mar 14 2013 - R4).docx |

Thursday, March 14, 2013 (9:00 AM - 12:00 PM)

BRITISH COLUMBIA | Ministry of Social Development

# Service Channel Strategy

## Welcome to the Region 4 Advocate Focus Group Session

**Dial in:** s.15,s.17

**ID Code:** s.15,s.17 (please use *6 to mute and unmute your phone – thank you)

## Ministry Team:

**Terri Archer – Senior Manager, Stakeholder Relations**, Regional Operations, MSD *(Facilitator – Channel Strategy – Stakeholder Engagement lead)*

**Elaine Cross – Senior Manager, Learning Services**, MSD *(Facilitator)*

**Harleen Price – Regional Manager, Community Relations and Service Quality**, MSD *(Regional Rep)*

**Pardip Bandeccha** – Regional Operations, MSD *(logistical/technical support & notes)*

**Judy D'Gal – Director of Implementation and Stakeholder Relations**, Regional Operations, MSD *(Channel Strategy lead)*

## Session Purpose:

**To engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.**

Thursday, March 14, 2013 (9:00 AM - 12:00 PM)

# Working Documents:

## Meeting Agenda

Agenda for Region 4
Live Meeting Advocat

## Channel Strategy Presentation

Channel Strategy
(Advocate Session - f

- opening remarks & context – **Terri** (slides 1 – 2)
- ground rules, introductions and agenda – **Elaine** (slides 3 – 5)
- Service Delivery as we know it – **Terri** (slides 6 – 8)
- We want to hear from you – **Elaine** (slide 9)
- What's next in SD – **Terri** (slide 10 – 13 portal demos) https://theloop.gov.bc.ca/rsd/Pages/channel-strategy.aspx
- What can we achieve today? + Brainstorming – **Elaine** (slides 14 – 19)
- Client consultation + Next Steps – **Terri** (slides 20 – 21)
- Reflections – **Elaine** (slide 22)
- Closing - **both**

## Region 2/3 Rollup

Final Summary Notes
- Jan 8 Region 2 and

*(In Word version)*

Final Summary Notes
- Jan 8 Region 2 and

**Evans Locker, Ann SDSI:EX**

**From:** Price, Harleen MSD:EX
**Sent:** Monday, March 11, 2013 2:36 PM
**To:** Bandechha, Pardip MSD:EX
**Cc:** Archer, Terri MSD:EX
**Subject:** confirmed advocates so far

Amy Taylor and Janet Sawyer from Nelson Advocacy Centre
Cheri Fitzsimmons from Aboriginal Friendship Society
Maggie Metz from Vernon Womens Transition House
Tish Lakes from Okanagan Advocacy
Bob Hughes (or Wendy Sims) from ASK Wellness
Kim Stanyer (and another worker) from CMHA

December 14, 2012

BRITISH COLUMBIA

Channel Strategy – Stakeholder Engagement

**Advocate Consultation – Phase 1 (Tish Lakes – Dec. 12, 2012)**

---

**Advocate consultation summary from Wednesday, December 12, 2012 Live Meeting session with advocate rep, Tish Lakes; ministry participants included Terri Archer and Pardip Bandechha, Regional Operations and Colleen Turner, Information Management Branch (to demo client online portal).**

Tish Lakes is with the Okanagan Advocacy and Resource Society (OARS), Kelowna, and co-chair of the Moving Forward Steering Committee (MFSC) which is a joint committee of representatives from the Legal Advocate community and the Ministry.

**Background**

A Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and, determine and monitor client satisfaction on an ongoing basis. A key deliverable of the Plan is to consult external stakeholders, with the target audiences identified to be advocacy organizations and clients.

While we plan to hold focus group sessions for both groups in the New Year, the timing with Christmas holidays required a more targeted and phased approach to begin engagement. The feedback received to date will inform the next phases of engagement.

**Advocate Feedback**

On December 12, 2012, Regional Operations consulted with Advocate rep, Tish Lakes and engaged in discussion around service delivery enhancement considerations and opportunities. An overview of the Channel Strategy was provided, including a demo of the proposed online client portal (My Self Serve).

To initiative the discussion, we summarized our current client service delivery model as providing service through a varied number of channels including telephone, online application tool, face-to-face, mail, fax, and email (i.e. Bus Pass Program). There is also service through Outreach and Trusted Third Parties. While our strategies must balance the needs of the clients, there are opportunities for increased efficiency and effectiveness.

We acknowledged some current service delivery channels such as call wait times, dropped calls and responsiveness to client requests. We then asked Tish the following questions and her responses are included.

**In your experience with our clients, what's tricky with the current service delivery channels?**

- Many new staff, coupled with technology (ICM):
  - Has made policy appear more restrictive
  - Problems/delays in producing cheques (Notice to End Tenancy requires payment within 5 days)
  - Delays in generating Request for Reconsiderations (these need to be produced quickly)
- Language barriers: need a coordinated flow (i.e. English as a second language clients are not offered help)
- Clients aren't being told that they still have the option of coming into a office to receive service
- Clients being directed to SSAA
- Delays in INA

**Client Online Portal Demo Feedback:**

- Add clearer instructions on the appointment page indicating that this tool is not the only option for getting an appointment time. Needs to indicate other options clearly (i.e., Phone number etc), particularly when there are no appointment times available online
- On the Community Resource page, ensure we check with agencies before adding them to the list. Ensure they want to be on the list and are appropriate for the page.
  - *It was noted that we can restrict the level of information/content shared on each page*
- Manage My Account: Have very clear and written protocol developed for vulnerable clients (i.e., what is appropriate for them to use on the self-portal to ensure they aren't being taken advantage of, extra security etc).
  - There may be spousal where the dominant spouse is reporting; how can we protect the non-dominant client?
    - *Passwords and security stages/levels of security to protect the vulnerable*
    - *May require a worker to verify certain actions to ensure client did intentionally*
- Be clear on the vision of the portal. The portal is one of the channels for clients to receive service.

**Other considerations: Anticipated Questions/Concerns from Stakeholders:**

- There will be questions with regard to expectations for technology (what is needed for access etc.); Be careful on what we are assuming concerning our clients capabilities regarding their abilities with technology
- How will the ministry handle situations where the client submits a form on the portal and it is filled out incorrectly?
- What will be the response time for questions that are asked on the self portal (i.e., written responses)? Will there be a delay?
- Suggest piloting the self serve portal.
- Need to consider resources for managing the portal. The ministry should not reallocate staff to the portal; need to hire additional staff, as there is not enough staff for the current channels already. Stakeholders will want additional staffing to manage/support client portal (not taking away from existing staffing/service support)
- Concerns about being too impersonal. Needs to be a balance, as there is a huge benefit in still having conversations with clients, as sometimes clients don't really know what they want, and it comes out by having a conversation.
- Need to be careful with written questions. Usually the initial question isn't actually the intended question, which is where a phone conversation is helpful.
- Consider linking written responses to other publications (i.e., Your Welfare Rights). Might want to consider connecting with Penny from POVNET as they are planning a session with advocates in January.

**We want and value client feedback. What would you recommend for engaging clients?**

- Live meeting and conference call format worked very well (visual, etc.).
- It would be interesting to contact a large organization, like BC Coalition, to identify clients for participation in feedback sessions.
- Consider approaching advocacy group, and asking them to participate in the client engagement. Advocates would recommend clients with a range of barriers to ensure we get a wide spectrum of feedback that represents our caseload.
- Ensure we get feedback from client groups that represents our caseload (i.e., people with head injuries, ESL, multiple barriered clients etc)

**What barriers do you think clients would foresee?**

- Access to computers – clients then go to advocates or library
  - Additional pressure on community agencies
  - Ensure ministry doesn't reference resources that don't exist. Library would be a good resource.
- Clients might abuse the communication on the self portal (i.e., continuously contact the ministry with questions)
- Written responses are tricky (Residential Tenancy Branch struggles with this issue). Errors happen. What clients might do with an error that they receive in writing through the portal?
- People may confuse ministries/responsibilities (MSD may get RTB questions)
- Online is impersonal.

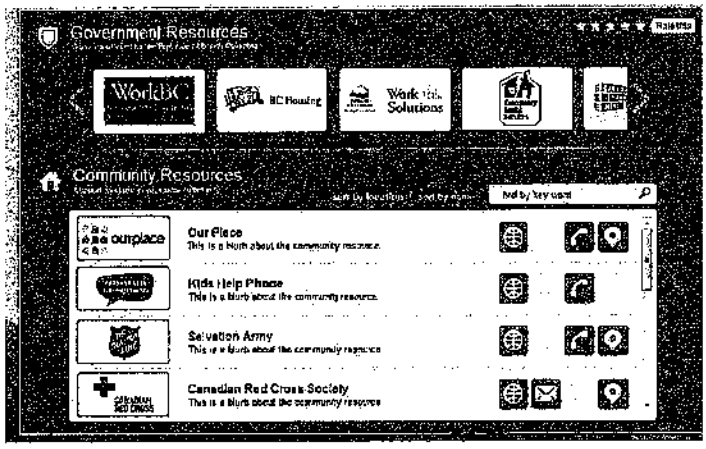
**How can we help clients overcome these barriers? What supports do we need to offer?**

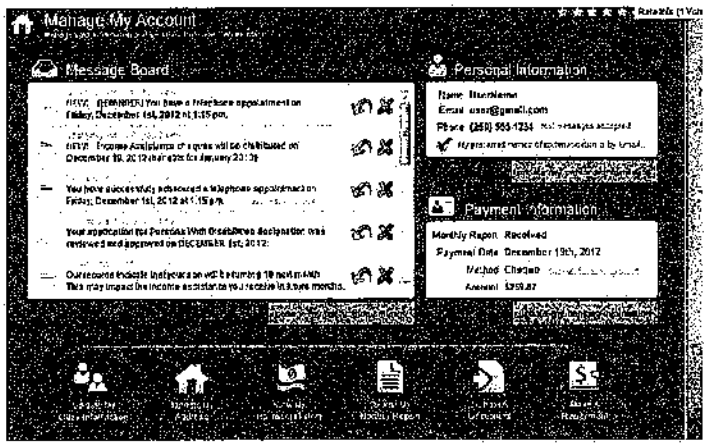
- Support from ministry and advocates
- Supports for English as a second language
- Use different forms of communication (i.e. head injury individuals prefer written information)
- Handouts are helpful (like *Your Welfare Rights* brochure)

**Anticipated Questions/Concerns from Stakeholders:**

- If a form is available online (through client portal), what are the expected response timelines?
- Need to ensure client is not directed to a computer to access a form
- Stakeholders will want additional staffing to manage/support client portal (not taking away from existing staffing/service support)

**Appendix A – Client Online Portal Screenshots**



**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Price, Harleen MSD:EX |
| **Sent:** | Friday, March 8, 2013 9:59 AM |
| **To:** | 'cherri.fitzsimmons@iifs.ca' |
| **Cc:** | Bandechha, Pardip MSD:EX |
| **Subject:** | FW: MSD Invitation Update Re: Advocate Consultation Session (March 14) |

**From:** Price, Harleen MSD:EX
**Sent:** Friday, March 8, 2013 9:58 AM
**To:** 'Advocacycentre@Nelsoncares.ca'; 'Cheri.Fitzsimmons@iifs.ca'; 'Maggie Metz - Vernon Women's Transition House'
**Cc:** Bandechha, Pardip MSD:EX
**Subject:** FW: MSD Invitation Update Re: Advocate Consultation Session (March 14)

**********

Thank you for confirming your participation in the Ministry of Social Development **Live Meeting discussion on Thursday, March 14 regarding our service delivery channels.**

In order to participate using the live meeting technology, **you will need to download Microsoft Live Meeting onto your computer prior to the test call.** Please note, this will work for most computers, but not all, depending on the operating system.

Attached is a link to help you with this: http://office.microsoft.com/en-us/help/download-the-microsoft-office-live-meeting-2007-client-HA010173383.aspx

**Download Live Meeting 2007**

*Within the link, click on...*

**We will be sending you two live meeting invitations. Please 'Accept' these.** One is for the day of the session (and the other for the test session). For each, complete the following steps:

- Open the meeting notice and Click on 'Join the Meeting'
- Call the conference number provided (and enter the Participant ID number provided)

We are setting up a **test call/meeting for Monday, March 11.** Please **ensure you have downloaded the live meeting technology prior to this call** (see link above). This test should not take more than 5 minutes, and we strongly recommend participating, as it will allow us to work with you to work out any technical issues.

A draft agenda and the summary of notes from the January 8th session is attached.

Please take some time to **read through the summary notes prior to our session (March 14),** as our discussion will be building upon these notes.

Thank you for participating in this opportunity, and we look forward to your feedback.

**Harleen Price**
Manager, Community Relations and Service Quality | Interior - Region 4
Ministry of Social Development
Ph: (250) 828-4714 | Fax: (250) 828-4614
Cell/IM: (250) 572-5932
Email: Harleen.Price@gov.bc.ca

**AGENDA – Thursday, March 14, 2013**

**Region 4 Advocate Consultation Focus Group**

**Live Meeting / Conference Call**

** All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

*** Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* ..... **9:00**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of recent consultation sessions*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* ..... **10:40**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other key/priority suggestions for each of the channels i.e., What's working, what's not,*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **11:50**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:00**

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful
- Channels and accommodation not available (available ministry resources vs. actual client need)
    - Provincial interpretation and accommodation services not being offered despite policy
    - Need more resources on the frontline
    - Outreach is good when available
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency and repeating story)
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
    - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
    - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
    - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., immigrants, refugees and certain segments of caseload)
    - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)
- Move to 1 800/1 866 – misdirected calls doesn't work
- Must use phone i.e., some clients don't have phones, which is frustrating
- Call centre across regions are not integrated

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Internet / Online Channel:**

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy –language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application tool
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants –lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for Job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application–privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 –6 level, plain language
    - When finishing the online application, clients are not sure when they are finished
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application –lack of documents –some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call
- Clients will go away, without receiving service, due to frustration

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure – timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
  - Concerns regarding not requiring signature
  - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
  - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
  - Will this be clear if a person is applying online?
  - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
  - How will this be resourced? (do not use existing resources needed to support other channels)
  - Integration with ICM system – will they have another system to search? needs to be integrated
  - Don't launch until other issues related to missing applications and other documents are remedied
  - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies
- Need to ensure clients have opportunities to be trained by the ministry on how to use this

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone * | • Connected to ICM |
| • Access to Supervisor/CRSQ** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ***** | • Long wait time |
| • Not fully accessible***<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones **** |
| • At times – can't do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service******* | • Doesn't work if client doesn't have access to a phone |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of Information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no call back received *** |
| • Callback option * | • More information for clients upfront at application** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources, skill set, self care as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)<br>o Family Maintenance Worker appointments<br>o Interpretation | • Advocate can easily get an appointment when requested ** |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province) |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone ******<br>o Systemic issue |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training *****. | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need – face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand**
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

*What's Working*

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

*What's Not Working*

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ******** | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in |

| | |
|---|---|
| often not accurate and can discourage some clients that need support | the regulation vs. a substantive change |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)***** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

***Potential Benefits/Impacts***

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Price, Harleen MSD:EX |
| **Sent:** | Thursday, February 28, 2013 10:23 AM |
| **To:** | Bandechha, Pardip MSD:EX |
| **Subject:** | FW: Invitation for live meeting session, re: Service Delivery |

**From:** Price, Harleen MSD:EX
**Sent:** Thursday, February 28, 2013 10:22 AM
**To:** Price, Harleen MSD:EX
**Subject:** Invitation for live meeting session, re: Service Delivery

Good morning!

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. In January, the ministry hosted advocates from Regions 2 & 3 to participate in a face-to-face forum. We are now **pleased to invite you to participate at an upcoming live meeting discussion** to continue building on the feedback we received from advocates that attended the Region 2 & 3 forum.

The **purpose of the sessions** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

**Discussion topics** include an opportunity for advocates to: share their experiences with our current service delivery channels, review the feedback received from Region 2 & 3; identify/prioritize service delivery enhancement opportunities; and to view a demo of a new service delivery channel option the ministry is developing.

The **meeting details** are as follows:

Date: Thursday, March 14, 2013

Time: 9:00 am – 12:30 pm

Location: By combination of live meeting and conference call

**Please RSVP by Friday, March 8, 2013** if you are interested in attending the live meeting session by contacting me at 250-828-4714 or by e-mail at Harleen.Price@gov.bc.ca

A draft agenda and the summary of notes from the January 8th session will be forwarded to participants prior to the meeting, along with the live meeting invitation and conference call details.

Thank you for considering this opportunity, and we look forward to your feedback.

**Harleen Price**

Manager, Community Relations and Service Quality | Interior - Region 4
Ministry of Social Development
Ph: (250) 828-4714 | Fax: (250) 828-4614
Cell/IM: (250) 572-5932
Email: Harleen.Price@gov.bc.ca

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Harrower, Ian MSD:EX |
| **Sent:** | Thursday, March 14, 2013 10:08 AM |
| **To:** | 'Tara Rogers'; 'staceytyers@tdcss.ca'; 'bbusby@spcrs.ca'; 'fsjwrc@telus.net'; 'Linda.tsw@citywest.ca'; 'cheryl.tsw@citywest.ca'; 'pggardens@hotmail.com'; 'rvss@telus.net'; 'david@usclas.com' |
| **Cc:** | Archer, Terri MSD:EX; Bandechha, Pardip MSD:EX |
| **Subject:** | FW: MSD Invitation Update Re: Advocate Consultation Session (March 21) |

Hi everyone – here is some information related to accessing **Live Meeting Stakeholder Session,** related to our Service Delivery Channels. The meeting is scheduled for March 21 from 9am to 12:30 and a test ( 5 minutes or so) will be held on March 18 (time to be determined) to ensure that the **Live Meeting** works for you. Thanks so much.

Ian Harrower
Manager of Community Relations/Service Quality
Region 5 - The North
Phone: 250 645-3906
Fax: 250 565-6366
E-mail: Ian.Harrower@gov.bc.ca

**********

Thank you for confirming your participation in the Ministry of Social Development **Live Meeting discussion on Thursday, March 21 regarding our service delivery channels.**

In order to participate using the live meeting technology, **you will need to download Microsoft Live Meeting onto your computer prior to the test call**. Please note, this will work for most computers, but not all, depending on the operating system.

Attached is a link to help you with this: http://office.microsoft.com/en-us/help/download-the-microsoft-office-live-meeting-2007-client-HA010173383.aspx

**Download Live Meeting 2007**

*Within the link, click on...*

**We will be sending you two live meeting invitations. Please 'Accept' these.** One is for the day of the session (and the other for the test session). For each, complete the following steps:

- Open the meeting notice and Click on 'Join the Meeting'
- Call the conference number provided (and enter the Participant ID number provided)

We are setting up a **test call/meeting for Tuesday, March 19.** Please **ensure you have downloaded the live meeting technology prior to this call** (see link above). This test should not take more than 5 minutes, and we strongly recommend participating, as it will allow us to work with you to work out any technical issues.

A draft agenda and the summary of notes from the January 8th session is attached.

Please take some time to **read through the summary notes prior to our session (March 21),** as our discussion will be building upon these notes.

Thank you for participating in this opportunity, and we look forward to your feedback.

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 645-3906
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

## AGENDA – Thursday, March 21, 2013

### Region 5 Advocate Consultation Focus Group

### Live Meeting / Conference Call

** All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

*** Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* ..... **9:00**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of recent consultation sessions*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* ..... **10:40**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other* **key/priority** *suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **11:50**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:00**

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful
- Channels and accommodation not available (available ministry resources vs. actual client need)
    - Provincial interpretation and accommodation services not being offered despite policy
    - Need more resources on the frontline
    - Outreach is good when available
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency and repeating story)
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
    - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
    - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
    - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., immigrants, refugees and certain segments of caseload)
    - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks

**Telephone Channel:**

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)
- Move to 1 800/1 866 – misdirected calls doesn't work
- Must use phone i.e., some clients don't have phones, which is frustrating
- Call centre across regions are not integrated

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

Internet / Online Channel:

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application tool
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 – 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants – lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application – privacy – times out after 45 minutes - the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The Instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
    - When finishing the online application, clients are not sure when they are finished
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents – some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call
- Clients will go away, without receiving service, due to frustration

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (Integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure – timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate does n't know client status – and have client to apply again which is unnecessary effort

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
  - Concerns regarding not requiring signature
  - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
  - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
  - Will this be clear if a person is applying online?
  - Find an office Icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?
- Plain language – use grade 3 - 6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, i.e. public guardian and trustee?
- Workers – how do they navigate
  - How will this be resourced? (do not use existing resources needed to support other channels)
  - Integration with ICM system – will they have another system to search? needs to be integrated
  - Don't launch until other issues related to missing applications and other documents are remedied
  - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies
- Need to ensure clients have opportunities to be trained by the ministry on how to use this

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone * | • Connected to ICM |
| • Access to Supervisor/CRSQ** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ***** | • Long wait time |
| • Not fully accessible***<br>  ○ Long distance calling restrictions<br>  ○ Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones **** |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back*** |
| • Phones used to undermine face to face<br>• No accountability on quality of service******* | • Doesn't work if client doesn't have access to a phone |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no call back received *** |
| • Callback option * | • More information for clients upfront at application** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources, skill set, self care as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)<br>o Family Maintenance Worker appointments<br>o Interpretation | • Advocate can easily get an appointment when requested ** |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning IOM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province) |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone ******<br>o Systemic issue |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need – face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

**Top Priorities Identified by Advocates:**

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand**
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ******** | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in |

| | |
|---|---|
| often not accurate and can discourage some clients that need support | the regulation vs. a substantive change |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******* | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/ level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

*What's Working*

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests **** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

*What's Not Working*

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |

*Needs/Gaps/Opportunities*

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

*Potential Benefits/Impacts*

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

**Evans Locker, Ann SDSI:EX**

**From:** Harrower, Ian MSD:EX
**Sent:** Wednesday, March 6, 2013 11:20 AM
**To:** Bandechha, Pardip MSD:EX; Archer, Terri MSD:EX
**Subject:** FW: Stakeholder engagement

Have sent out invitations to the following agencies re stakeholder engagement. Thanks.

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 565-4478
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

**From:** Harrower, Ian MSD:EX
**Sent:** Tuesday, March 5, 2013 1:58 PM
**To:** Harrower, Ian MSD:EX
**Subject:**

| | Name | Agency | Community | Phone | E-mail |
|---|---|---|---|---|---|
| 1 | Tara Rogers | Active Support Against Poverty | Prince George | 250 563-6112 | asap@princegeorge.com |
| 2 | Stacey Tyers | Terrace and District Social Services | Terrace | 250 635-3178 | staceytyers@tdcss.ca |
| 3 | Bob Busby | South Peace Community Services | Dawson Creek | 250 782-9174 | bbusby@spcrs.bc.ca |
| 4 | Sylvia Lane | Womens Resource Centre | Fort St John | 250 787-1121 | fsjwrc@telus.net |
| 5 | Terry Intermela | Prince Rupert Unemployment Action Centre | Prince Rupert | 250 627-8776 | Allowed5@yahoo.ca |
| 6 | Bev Collinson | Haida Gwaii Legal Project | Queen Charlotte | 250 559-9042 | Hgiegal@haidagwaii.net |
| 7 | Linda | Tamitik Status of Women | Kitimat | 250 632-8787 | Linda.tsw@citywest.ca |
| 8 | Penny Rivard | Robson Valley Community Services | McBride/Valemount | 250 569-2200 | pggardens@hotmail.com |
| | | | | | |

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 565-4478
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

**Evans Locker, Ann SDSI:EX**

**From:** Bandechha, Pardip MSD:EX
**Sent:** Monday, March 4, 2013 4:21 PM
**To:** Harrower, Ian MSD:EX
**Cc:** Archer, Terri MSD:EX
**Subject:** Invitation for five meeting sessions with advocates

Hi Ian

As discussed, please forward the email below to the advocates you will be inviting to the session. Please cc myself and Terri and remember to update the yellow highlighted areas with your contact information.

Let me know if you have any questions.

Thanks

Pardip

**********

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. In January, the ministry hosted advocates from Regions 2 & 3 to participate in a face-to-face forum. We are now **pleased to invite you to participate at an upcoming live meeting discussion** to continue building on the feedback we received from advocates that attended the Region 2 & 3 forum.

The **purpose of the sessions** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

**Discussion topics** include an opportunity for advocates to: share their experiences with our current service delivery channels, review the feedback received from Region 2 & 3; identify/prioritize service delivery enhancement opportunities; and to view a demo of a new service delivery channel option the ministry is developing.

The **meeting details** are as follows:

Date: Thursday, March 21, 2013

Time: 9:00 am – 12:30 pm

Location: By combination of live meeting and conference call

**Please RSVP by Friday, March 15, 2013** if you are interested in attending the live meeting session by contacting Ian Harrower at 250-XXX XXXX or by e-mail at Ian.Harrower@gov.bc.ca

A draft agenda and the summary of notes from the January 8th session will be forwarded to participants prior to the meeting, along with the live meeting invitation and conference call details.

Thank you for considering this opportunity, and we look forward to your feedback.

Ian Harrower
Manager of Community Relations and Service Quality
Region 5 - The North
Phone 250 565-4478
Fax 250 565-6366
E-Mail Ian.Harrower@gov.bc.ca

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Bousquet, Jeannine M MSD:EX |
| **Sent:** | Friday, March 1, 2013 4:38 PM |
| **To:** | 'Brenda'; 'Don'; Fontaine, Jan IAG:EX; 'France Tellier'; 'Gillian'; 'Haixia'; 'Jennifer'; 'Jeorge'; 'Judy Whittingham'; 'kelly'; 'Rhonda Billie'; 'Tammy Brown'; 'Violet Hayes'; 'Vivienne Gorringe' |
| **Cc:** | Archer, Terri MSD:EX; Bandechha, Pardip MSD:EX |
| **Subject:** | MSD Invitation Update Re: Advocate Consultation Session (March 6) |

Thank you for confirming your participation in the Ministry of Social Development **Live Meeting discussion on Wednesday, March 6** regarding our service delivery channels.

In order to participate using the live meeting technology, **you will need to download Live Meeting onto your computer prior to the test call.** Please note, this will work for most computers, but not all, depending on the operating system.

Attached is a link to help you with this: http://office.microsoft.com/en-us/help/download-the-microsoft-office-live-meeting-2007-client-HA010173383.aspx

**Download Live Meeting 2007**

*Within the link, click on...*

**We will be sending you two live meeting invitations. Please 'Accept' these.** One is for the day of the session (and the other for the test session). For each, complete the following steps:

- Open the meeting notice and Click on 'Join the Meeting'
- Call the conference number provided (and enter the Participant ID number provided)

We are setting up a **test call/meeting** for **Tuesday, March 5.** Please **ensure you have downloaded the live meeting technology prior to this call** (see link above). This test should not take more than 5 minutes, and we strongly recommend participating, as it will allow us to work with you to work out any technical issues.

A draft agenda and the summary of notes from the January 8th session is attached.

Please take some time to **read through the summary notes prior to our session (March 6),** as our discussion will be building upon these notes.

Thank you for participating in this opportunity, and we look forward to your feedback.

**Jeannine Bousquet**
*Manager Community Relations and Service Quality*
*Ministry of Social Development*
*108 Richards Street*

*Nanaimo, BC V9R 2S8*
*Phone: 250-739-6606*
*FAX: 250-739-6695*

## AGENDA – Wednesday, March 6, 3013

### Region 1 Advocate Consultation Focus Group

### Live Meeting / Conference Call

* *All participants will need to phone into the conference line and also log into the Live Meeting (through the link and call details provided in the calendar invitation)*

** *Summary from Region 2 & 3 consultation provided for review prior to this session as it sets the foundation for discussion.*

1. **Opening Remarks and Introductions** *(Terri Archer)* ..... **9:00 – 9:25**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
   - *Overview of the Region 2 & 3 consultation session*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:25 – 9:55**
   - *Share key messages on the project*
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*
   - *Participants Sharing: Roles/Experiences/Examples – Opportunity for advocates to share what is working and what is tricky with the current service delivery channels*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:55 – 10:55**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - *Show demo (video clips) and seek feedback on scope, functionality and support for portal (Terri)*
   - *Review suggestions and priorities from the Region 2 and 3 advocate consultation.*
     - *Add any other key/priority suggestions.*

4. **Brainstorming** *(Elaine Cross)* ..... **10:55 – 12:10**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *(By Live Meeting) Participants review summary document from Region 2 & 3 consultation and discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc) and add any other **key/priority** suggestions for each of the channels i.e., What's working, what's not.*
   - *Participants review & prioritize top 3 opportunities and provide their feedback (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (15 minutes each topic = 60 minutes)*
   - *Identification of opportunities to consult further with clients – and ongoing (10 minutes)*

5. **Next Steps** ..... **12:10 – 12:30**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:30**

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## Advocacy Organization Feedback: Roles/Experiences/Examples

*Opportunity to share what is tricky with the ministry's current service delivery channels*

**General Comments:**

- Inefficient service delivery system for clients – stressful
- Channels and accommodation not available (available ministry resources vs. actual client need)
  - Provincial interpretation and accommodation services not being offered despite policy
  - Need more resources on the frontline
  - Outreach is good when available
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency and repeating story)
- Increased expectation of independence of client (i.e., over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic
- Life skills – many clients don't have, which creates a reliance on duplicate contacts with the ministry
  - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
  - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs
- Develop specialized skills – new workers don't have enough knowledge
- Release of Information/Consents – more efficiency needed
  - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., immigrants, refugees and certain segments of caseload)
  - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service
- Use expertise of advocates to provide orientation and training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate may not be available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best)
- Wait times for Immediate Needs Assessments – clients waiting weeks

**Telephone Channel:**

- Phone system – dropped calls and staff not available
  - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)
- Move to 1 800/1 866 – misdirected calls doesn't work
- Must use phone i.e., some clients don't have phones, which is frustrating
- Call centre across regions are not integrated

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Internet / Online Channel:**

- Difficulty applying
  - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online
  - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
  - No SIN card can't do online application tool
  - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
  - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
  - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online
  - Applicants – lose information, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
  - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
  - Online application – privacy – times out after 45 minutes - the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
  - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
  - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
    - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
    - When finishing the online application, clients are not sure when they are finished
- Clients who have applied
  - No understanding of the process (i.e., what happens next after the application is submitted) is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call
  - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason
  - Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
  - Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
  - Online application – lack of documents – some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

**Face-to-Face Channel:**

- Clients do not have the funds to get to the office
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call
- Clients will go away, without receiving service, due to frustration

**Other - Relationship with Advocates:**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (Integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients

**Other – Policy:**

- Persons with Disabilities – why do they have to complete employment questions
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and have client to apply again which is unnecessary effort

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
    - Concerns regarding not requiring signature
    - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduces risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
    - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
    - Will this be clear if a person is applying online?
    - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?
- Plain language – use grade 3 -6 level (i.e., use simple language)
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies
- Need to ensure clients have opportunities to be trained by the ministry on how to use this

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **1 800/1 866 or direct phone line for advocates**
2. **Ability to send faxes directly to phone line (1 866 or other line)**
3. **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

*What's Working*

| | |
|---|---|
| • Ability to speak with someone * | • Connected to ICM |
| • Access to Supervisor/CRSQ** | • No travel, no line ups * |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

*What's Not Working*

| | |
|---|---|
| • Dropped calls, busy signal, many call backs ***** | • Long wait time |
| • Not fully accessible***<br>o Long distance calling restrictions<br>o Free access, no privacy, time limits | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones **** |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ | • Workers hang up when unable to call back *** |
| • Phones used to undermine face to face<br>• No accountability on quality of service******* | • Doesn't work if client doesn't have access to a phone |

*Needs/Gaps/Opportunities*

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of information have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no call back received *** |
| • Callback option * | • More information for clients upfront at application** |

*Potential Benefits/Impacts*

| | |
|---|---|
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

1. **Increase accessibility for those in need of this channel (i.e., all language and disability needs)**
2. **Do not turn away clients – need better coordination of services across all channels**
3. **Staff it – adequate level of resources, skill set, self care as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human *****<br>o More likely to disclose information<br>o Trust established<br>o Opportunity to voice/personalize situation**<br>o Get more information at first contact | • Workers able to serve in other languages ******<br>o Worker and client able to pick up on non verbal queues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)<br>o Family Maintenance Worker appointments<br>o Interpretation | • Advocate can easily get an appointment when requested ** |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response******* |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service *********<br>o Coordination of service channels needed as there is a need to fit together *****<br>o Staff themselves tell clients and advocates to come to office | • Resources<br>o Staff vs. caseload, and more integration needed<br>o Division of workers and reception – tell story more than once (lack of continuity)<br>o Feelings among advocates/community that this service is not available i.e., applications ** |
| • Discretionary and accommodation training i.e., new staff*******<br>o Use it – don't just turn people away to another channel when right in front of you | • Privacy issues<br>o See guard holding door shut<br>o Conduct of guards – not appropriate – get into personal stuff (not necessary) |
| • Staff visibly learning ICM | • Hours of work – should match working public |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>o Customer service focus (varies across province) |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office | • Issues with offices<br>o Children – strollers – no room/space<br>o Bathrooms not being provided |
| • Tolerance taken too far (Third Party) – people get administered for every little thing | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone *******<br>o Systemic issue |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need – face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel* | • Hour extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## INTERNET/ONLINE

Top Priorities Identified by Advocates:

1. **Improve the Self Serve Assessment and Application tool**
   - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging (i.e., an estimate of time it should take so they know if they are likely done well before (i.e., in 5 minutes) that probably the application is incomplete**
   - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand**
   - **Fewer words – more simple words – and online help**
   - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them**
   - **More signs you are done; i.e., if applicants are given a checklist upfront**
2. **Appointment booking**
   - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet**
3. **Improve the Online Resource search function**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application – need a feedback loop and alternatives when this is not working ******** | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Index helpful on the Online Resource but confusing with layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers)<br>o Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give the advocate's office but can't wait around for a call, plus it ties up the advocate office – also not user friendly for some (i.e., technology gap) disabled*, age (seniors) also seen as a potential barrier as they may not have computer skills, or desire/ability to learn new skills |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – this is problematic and leads to delays | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question |
| • Online application is not asking the right questions for the application to determine a client's needs | • Language (various) - the online application needs to be in multiple languages |
| • Transition from assessment into the application is not clear to new applicants | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours |
| • Online application - estimator tool is not always accurate - almost always says not eligible, which is | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in |

| | |
|---|---|
| often not accurate and can discourage some clients that need support | the regulation vs. a substantive change |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator that is intuitive to users (i.e., color change/ flashing etc) to tell client they are "not done" as a warning message if they try to exit the browser before they have submitted the application********** | • Online application needs more alerts/graphics ***** |
| • Online application - call back number to get status and arrange for appointment; suggest having application set appointment at end ******** | • Online application needs technical support – who provides technical support – right now, advocates feel they are providing (or expected to provide) |
| • Online application needs a single #. Having two numbers (assessment number and application number) is confusing; and, make the # more visible so clients know to write it down and keep it | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and needs more (obvious) feedback as to process/steps/level of completion |
| • Identify reason to keep online application number handy* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs a searchable box that is only within the Online Resource and not across the web, i.e, find all related documents to a topic***** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Improving search function/information on the Online Resource could reduce pressure on other channels ** |
| • Use plain language in the online application - needs to be a balance between legal privacy and usability – reduces questions improves understanding***** | • Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |

Ministry of Social Development
Region 2 & 3 Consultation Session with Advocates – January 8, 2013
Service Delivery Feedback/Opportunities

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Other - Top Three Priorities Identified by Advocates:**

1. **Increase the number of liaisons**
   - **Employment and Assistance Workers, mental health and homeless outreach services**
2. **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
3. **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

*What's Working*

| | |
|---|---|
| • Homeless outreach services (when available) **** | • Email supervisors too fast track requests**** |
| • Ministry worker attends advocacy organization to assist with applications * | • Access to Mental Health worker* |
| • Fax authorizations (bus pass) if known | |

*What's Not Working*

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests | • Faxes taking too long (since ICM phase 2)<br>o Losing or can't find documents Release of Information<br>o Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)*** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |

*Needs/Gaps/Opportunities*

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation (North)* | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available ********** ***<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons |
| • Ability for advocate to forward application package/documents (outside of online application) | • Targeted use of email – some transactions don't need face to face i.e., email – bus pass<br>o Expansion – keep application together<br>o Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | |

*Potential Benefits/Impacts*

| | |
|---|---|
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Hare, Kashmir K MSD:EX |
| **Sent:** | Friday, December 21, 2012 9:31 AM |
| **To:** | Hare, Kashmir K MSD:EX; 'Allison Ward'; 'Brenda Kobzey'; 'Chris Thomas (VAST)'; 'Freda McClellan (MPA)'; 'Gurpreet Pabla'; 'Janet Berry (First United)'; 'Karen Hobbs (MPA)'; 'kettle friendship, supervisor'; 'Ninu Kang (MOSAIC)'; 'Penny Goldsmith'; 'Preet Pandher'; 'Robin Loxton (BCCPD)'; 'stephanie smith'; 'Susan Henry (First United Church)'; 'Tannis Braithwaite'; 'mosaic@mosaicbc.com'; 'Leesa McDowell (DEWC)' |
| **Cc:** | Bandechha, Pardip MSD:EX; Lofthouse, Jean C MSD:EX |
| **Subject:** | RE: MSD Invitation to Discussion Forum - Jan. 8, 2013 |

Good Morning,

I am re-sending this just email as a reminder to confirm you attendance with Pardip Bandechha @ Pardip.Bandechha@gov.bc.ca.

Please RSVP by December 28th.

Happy Holidays!

***Kashmir Hare***
*Manager, Community Relations & Service Quality*
*Vancouver Coastel Regional Office*
*Ministry of Social Development*
*Phone: 604-660-3224*

---

**From:** Hare, Kashmir K MSD:EX
**Sent:** Monday, December 17, 2012 2:16 PM
**To:** 'Allison Ward'; 'Brenda Kobzey'; 'Chris Thomas (VAST)'; 'Freda McClellan (MPA)'; 'Gurpreet Pabla'; 'Janet Berry (First United)'; 'Karen Hobbs (MPA)'; 'kettle friendship, supervisor'; 'Ninu Kang (MOSAIC)'; 'Penny Goldsmith'; 'Preet Pandher'; 'Robin Loxton (BCCPD)'; 'stephanie smith'; 'Susan Henry (First United Church)'; 'Tannis Braithwaite'
**Cc:** Bandechha, Pardip MSD:EX; Lofthouse, Jean C MSD:EX
**Subject:** MSD Invitation to Discussion Forum - Jan. 8, 2013

The Ministry of Social Development invites local advocates to a face-to-face discussion about service delivery.

We are in the process of developing a Channel Strategy to inform our future service delivery channel decisions. As part of the strategy, we are interested in seeking information and feedback from our stakeholders, including clients and advocacy organizations. We are pleased to invite you to participate at an upcoming discussion forum in Vancouver (note: we are also planning other subsequent condensed forums across the province, predominantly by Live Meeting). For the face-to-face session, we will need to balance limited seating with broad representation.

The **purpose of the session** is to engage in a broad and open dialogue with advocacy organizations that provide direct service to our clients, to determine our current service delivery effectiveness and seek feedback that will inform future service delivery decisions.

Discussion topics include an opportunity for advocates to share their experiences with our current service delivery channels, provide feedback to identify new service delivery enhancement opportunities, and to view a demo of a new service delivery channel option the ministry is exploring.

**The meeting details are as follows:**

**Date:** Tuesday, January 8, 2013

**Time:** 9:00 am – 3:00 pm (lunch will be provided)

**Location:** Ministry of Social Development Learning Centre, 18th floor – 1050 West Pender Street, Vancouver, BC *(Training Room 1)*

**Please RSVP by December 28th if you are interested in attending this face-to-face session** by contacting Pardip Bandechha at (250) 387-2889 or by e-mail at Pardip.Bandechha@gov.bc.ca.

We are unable to provide travel expenses other than lunch, but would ask that those planning to attend include any special dietary restrictions in your reply so that we can accommodate your specific dietary needs.

A draft agenda and venue details, including driving directions, have been included with this invitation.

<< File: Draft Agenda for R2 R3 F2F Focus Group.docx >> << File: MSD Learning Centre.pdf >>

Thank you for considering this opportunity, and we look forward to your feedback.

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

*This message is confidential and may not be disclosed to anyone without the expressed written consent of the sender*

**Region 1 - Participant**

| Name | Organization |
|---|---|
| Brenda Cosby | Advocacy Services Centre |
| Don McConnel<br>Ann Gougon | Nanaimo Citizens Advocacy |
| Haixia Liu<br>Emily | Victoria Immigration and Refugee Centre Society |
| Kelly Newhook<br>Natasha Page<br>Stephen Portman<br>Kara Maxwell | TAPS |
| Vivienne Gorringe<br>Rhonda Billie<br>Caty | Wachiay Friendship Centre |
| France Tellier | John Howard Society Nanaimo |
| Violet Hayes<br>Richard Powell | Island Crisis Care Society |
| Jan Fontaine and<br>Carrie Graham | Justice Access Centre |
| Risako Ota | Central Vancouver Island Multicultural Society |
| Tammy Brown | Nanaimo Regional General Hospital – Psych Ward |
| Dawn Clark | Haven Society |

**Total Advocates:** 20

**Total Organizations** 11

**Confirmed Advocate Participants:** 21 confirmed advocates
5 ministry staff Elaine Cross, Colleen Turner, Trent Brown, Judy D'Gal and Jean Lofthouse

| Name | Organization | Contact Information | Comments |
|---|---|---|---|
| Liza McDowell | DTES Women's Centre | mhadvocate@dewc.ca | Will be arriving Late |
| Robin Loxtin | BC Coalition of People with Disabilities | povpost@bccpd.bc.ca | |
| Tish Lakes<br>Executive Director | Okanagan Advocacy and Resource Society | oars@telus.net | |
| Annette | BCCPD | advocate@bccpd.bc.ca | |
| Maureen St. Louis<br>Legal Advocate | SHARE Family and Community Services (Port Moody) | Maureen.st.louis@sharesociety.ca | |
| Alexandra Charlton<br>Director | S.O.S. Settlement Orientation Services | acharlton_sos@vrsa.ca | |
| Alison Ward<br>Barrister and Solicitor | Community Legal Assistance Society | award@clasbc.net | |
| Erin Pritchard | BC Public Interest Advocacy Centre | Epritchard@bcpiac.com | |
| Stephanie Smith<br>Paralegal | MOSAIC Legal Advocacy Program | ssmith@mosaicbc.com | |
| Jaspreet Janda | Sources Community Resource Centre | jjanda@sourcesbc.ca | |
| Kris Sutherland<br>Manager | The Kettle Advocacy Service | ksutherland@thekettle.ca | |
| Michele Sutherland MSW, BC | Cancer Agency-FVC | Michele.Sutherland@bccancer.bc.ca | Will be arriving at noon |
| Iris Solorzano<br>Assistant Program Manager | Options Community Services | Iris.Solorzano@options.bc.ca | |
| Sally White | Vancouver Association for Survivors of torture | Sally.White@ vast-vancouver.ca | |
| DeDe Dufresne | First United Advocacy | ddufresne@firstunited.ca | |
| Freda Mac Lellan<br>Advocate, MPA Advocacy | Motivational, Power and Achievement Society (MPA Advocacy) | fmaclellan@mpa-society.org | |
| Saph K. Jheeta | Community of Care for Survivors of Torture | s.22 | |
| Simone Maxwell | Independent Counsellor | simone_maxwell@hotmail.com | |
| Natasha Cornwallace | Elizabeth Gurney House | natasha.cornwallaceEFS@elizabethfry.com | |
| Kim Irving | Elizabeth Gurney House | Kim.Irving@elizabethfry.com | |
| Robyn Kelly | Shiloh-Sixth United Church | robynk@shiloh-6ave.net | |

**Future Sessions:**

- Penny Goldsmith (PovNet) 1-604-876-8638
  penny@povnet.org
  ***Will participate in future session via live meeting. Not available for Jan 8.***

**Region 4 – Advocate Consultation**

| Name | Organization | |
|---|---|---|
| 1. Amy Taylor<br>Janet Sawyer | Nelson Advocacy Centre | |
| 2. Cheri Fitzsimmons | Aboriginal Friendship Society | |
| 3. Maggie Metz | Vernon Womens Transition House | |
| 4. Tish Lakes | Okanagan Advocacy Centre | |
| 5. Kim Stanyer<br>Adda Dostal ??? | CMHA | **Harleen – Do you know Anna Last name** |

**Total Advocates:** **7**

**Total Organizations** **5**

**Region 5 - Participants**

| | | | | |
|---|---|---|---|---|
| 1 | Tara Rogers | Active Support Against Poverty | Prince George | asap@princegeorge.com |
| 2 | Stacey Tyers | Terrace and District Social Services | Terrace | staceytyers@tdcss.ca |
| 3 | Bob Busby | South Peace Community Services | Dawson Creek | bbusby@spcrs.ca |
| 4 | Sylvia Lane | Womens Resource Centre | Fort St John | fsjwrc@telus.net |
| 5 | Linda Slanina | Tamitik Status of Women | Kitimat | Linda.tsw@citywest.ca |
| 6 | Penny Rivard | Robson Valley Community Services | McBride<br>Valemount | pggardens@hotmail.com |
| 7 | Danielle Clough | Active support against poverty | Prince George | |
| 8 | Cheryl Rumley and Trish Lapointe | Tamitik Status of Women | Kitimat | |
| 9 | *Terry Intermela* | *Prince Rupert Unemployment Action Centre* | Prince Rupert | |

**Total Advocates:** 10

**Total Organizations** 9

**Evans Locker, Ann SDSI:EX**

**From:** Archer, Terri MSD:EX
**Sent:** Monday, December 10, 2012 9:55 AM
**To:** MSD Community Relations and Service Quality Managers
**Cc:** D'Gal, Judy MSD:EX; Bandechha, Pardip MSD:EX
**Subject:** Stakeholder / Advocate Engagement Update

Hello all, I wanted to reconnect with you in follow-up to the brief meeting we had last week regarding engaging advocates on the Channel Strategy, in particular, facilitating local focus groups that includes a demo of the online Client Portal. (Incidentally, the next ADM Chatline, Dec. 13, will showcase the online portal for staff and introduce the Channel Strategy).

I am happy to report that there is a way to expand Live Meeting access to include external attendees and we are testing this next week. To kickoff the Channel Strategy consultation, we will be connecting with Tish Lakes to provide a brief demo of the online portal and discuss the focus group agenda(s). Tish is supportive of our plans to connect with the advocates.

We are progressing on the planning for the face-to-face session for Regions 2 and 3 in Vancouver, at the Learning Centre, which is targeted for the second week of January. We are not certain yet if this meeting will expand to offer advocate participation by live meeting as this adds a challenging dynamic to the group work. We do, however, intend to extend a live meeting/conference call to all CRSQs for at least a portion of this session in order to inform your regional focus group sessions.

A condensed agenda has been drafted for Live Meeting based focus groups to support advocate consultation in all regions. (Both draft agendas are attached for your information). It was proposed that regions could arrange for their advocates to attend a local MSD office to access live meeting for their local focus group discussion if needed.

We are hoping the CRSQs can arrange and oversee, if not lead, the focus group sessions in their respective regions. The agenda, client portal demo, and feedback template will be provided and HQ support (likely by live meeting) is also a possibility as needed. We will certainly have a better sense as we progress with the Vancouver session.

Please give some thought as to how the advocate engagement can work in your region and what support you need to make it happen. The target for these focus groups is January/February so feedback can inform the online portal that's planned pilot launch is around spring.

Please feel free to connect with me directly to discuss further as needed and I will keep you all updated on our progress. Thank you.

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

*"It won't be the ability to fiercely compete but the ability to lovingly cooperate that will determine success" (Kouzes and Posner, 2002)*

**DRAFT AGENDA - Live Meeting**

**Advocate Consultation Focus Group**

1. **Opening Remarks and Introductions** *(Terri)* ..... **9:00 – 9:10**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*

2. **Overview of Channel Strategy** *(Terri)* ..... **9:10 – 9:20**
   - *Overview of current service delivery channels "as we know it" and "our current challenges"*

3. **Possible Future Channel Enhancements** *(Terri)* ..... **9:20 – 10:40**
   - *Overview of possible future channel options and service delivery enhancements (Terri)*
   - ***Demo of self serve portal*** *(Colleen Turner)*
   - *Seek feedback/input on scope, functionality and support for portal (Terri and Colleen)*

4. **Brainstorming** *(Elaine and/or Terri)* ..... **10:40 – 11:40**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (5 minutes)*
   - *Participants, in one group or smaller groups if attendance allows, discuss each channel option (Internet/Online, Face-to-Face, Telephone, Other including outreach, mail, fax, email etc).*

     *Participants work together to identify opportunities/future* ***enhancements for consideration****; What's working, what's not. Participants prioritize top 3 opportunities (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel (10 minutes each topic = 40 minutes)*
   - *Identification of opportunities to consult with clients (10 minutes)*

5. **Next Steps** ..... **11:40 – 12:00**
   - *Next steps – How do we keep the dialogue going? (Terri)*
   - *Closing remarks (Terri)*

**End of Session** ..... **12:00**

## DRAFT AGENDA – F2F (Regions 2 & 3)

1. **Opening Remarks and Introductions** *(Judy)* ..... **9:00 – 9:20**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of Session*

2. **Overview of Channel Strategy Project** *(Judy)* ..... **9:20 – 9:30**
   - *Overview of current service delivery channels "as we know it" and "our current challenges" (Judy)*

3. **Participant Sharing: Roles/Experiences/Examples** *(Elaine)* ..... **9:30 – 10:00**
   - *Opportunity to share what is tricky with the current service delivery channels*

**Break** ..... **10:00 –10:15**

4. **Possible Future Channel Enhancements** *(Judy)* ..... **10:15 – 12:00**
   - *Overview of possible future channel options and service delivery enhancements (Judy)*
   - ***Demo of self serve portal*** *(Colleen Turner)*
   - *Seek feedback/input on scope, functionality and support for portal (Judy)*

**Lunch** ..... **12:00 – 1:00**

5. **Brainstorming Groups** *(Elaine)* ..... **1:00 – 2:00**
   - *Scope, functionality and supports for channel development and potential benefits/impacts (10 minutes)*
   - *Participants work in smaller groups to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email etc); Each group works together to identify opportunities/future enhancements for consideration; What's working, what's not… (10 minutes each topic = 40 minutes)*
   - *Identification of opportunities to consult with clients (15 minutes)*

6. **Prioritizing Groups** ..... **2:00 –2:30**
   - *Review of Report Out (additional comments) (Elaine) (10 minutes)*
   - *Participants prioritize top 3 opportunities (from the ideal perspective, what would be critical to the success of the developing/enhancing each channel) (10 minutes)*

7. **Report Out on Key Opportunities Identified** *(Elaine)* ..... **2:30– 2:40**

8. **Next Steps** ..... **2:40 – 3:00**
   - *Next steps – How do we keep the dialogue going? (Judy)*
   - *Closing remarks (Judy)*

**End of Session** ..... **3:00**

Thursday, November 29, 2012 (3:00 PM-3:30 PM)

# Stakeholder Engagement

## Consulting Advocates

**Dial in:** s.15,s.17 (Vancouver local)

**ID Code:** s.15,s.17 (*6 to mute and unmute your phone – thank you)

### Meeting Purpose:

**To discuss Stakeholder Engagement plan for conducting focus group sessions with advocates across the province focussed on the Channel Strategy.**

---

### Proposed Plan:

- **Facilitate focus group session at the Learning Centre (Vancouver) for Regions 2 & 3 advocates**
  - Elaine Cross to facilitate (with RSD support)
  - HQ co-facilitates by conference call and live meeting
  - Local CRSQs attend in person and assist with facilitation/group work
  - Other CRSQs attend by conference call and live meeting (if possible)

- **Discuss what is possible for Regions 1, 4, and 5 to consult advocates.**

### Draft Agenda:

Draft Agenda for R2 R3 F2F Foc...

**MINISTRY OF SOCIAL DEVELOPMENT**
**INFORMATION NOTE**

**DATE:** January 24, 2013

**PREPARED FOR:** Mark Sieben, Deputy Minister

**ISSUE:** **Plan for upcoming Channel Strategy focus groups with BCEA clients**

**BACKGROUND:**

The objective of this note is to outline the overall plan for Channel Strategy focus group consultations with BCEA clients planned for February and March 2013.

Conducting client focus groups is one deliverable of the approved Stakeholder Engagement Plan, developed by Regional Operations Branch as part of the Channel Strategy to enhance service delivery. The overall objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy, identify service delivery efficiencies to enhance client satisfaction, and determine and monitor client satisfaction on an ongoing basis.

The specific objectives of these upcoming client focus groups are to:

- Introduce the online portal vision to clients;
- Obtain timely client feedback on the online portal prototype (self-serve channel), including feedback about potential barriers to be addressed and supports required to enhance client uptake for this new service channel;
- Assess client preferences, needs and decision-making criteria when choosing a service channel; and,
- Enhance our understanding of our clients' needs for service channels, including determining effectiveness of current channels and potential opportunities for service delivery improvements

The ministry is in the process of designing a number of online self-service functions to be initially offered to our clients, with plans to phase in new service options on the online portal over time.

The ministry has funding approval to contract Berlin Eaton, through the Corporate Supply Arrangement, to facilitate these client focus group consultation sessions (Cliff #177990).

**DISCUSSION:**

**Overall Process:** Regional Operations is working with Berlin Eaton and a Steering Committee (Appendix A) to finalize/refine all details for the focus groups. The Steering Committee has proposed to conduct the first two sessions in Regions 2 and 3. Lessons learned and results of the initial client focus groups will be reviewed by the Steering Committee to ensure any mid-project adjustments are made before subsequent sessions are held in Regions 4, 5 and 1 (in that order). The schedule has been designed to minimize expected travel costs, and to allow for flexibility to make modifications as needed to remain within the project budget allocation. This schedule also provides early preliminary feedback from the initial two sessions that can be incorporated during the early phase of the online portal design, maximizing overall project cost effectiveness.

**Locations:** There is broad support for conducting one session in each of the five regions, with the goal of reaching out to a broad client base and ensuring diversity, in terms of client mix, geography and service delivery offerings throughout the province. The schedule is designed to offer client focus groups in the following communities: Nanaimo, Vancouver, Surrey, Kelowna and Prince George. Any remaining project budget could be used to offer a final client focus group session within Region 1 (Victoria). Regional Community Relations and Service Quality Managers

**Venues:** Regional Community Relations and Service Quality Managers are identifying a local facility/venue to hold their respective regional client focus group. Key considerations are to ensure a neutral and accessible environment with adequate space and on transportation route (e.g. community centre or library space). Venue rental was considered in the project budget.

**Documentation:** Regional Operations has drafted a Project Charter, a Privacy Impact Assessment (PIA) - confirming that no personal information is being collected - and a Security Threat Risk Assessment (STRA). A detailed work plan is being prepared, as well as all session content, including scripts, questions, agendas, materials and any handouts. A final report will be prepared by Berlin Eaton documenting feedback/overall findings following all of the client focus group sessions.

**Sample Selection/Participants:** After consultation with the Research Branch and Berlin Eaton, the Steering Committee proposes identifying a targeted sample that broadly represents the client caseload, with consideration to those clients that may be well suited to participate (approx. 3-5 hours) and excluding those with health and safety alerts.

The expected target group includes: persons with disabilities, expected to work clients, single persons, single parents, Aboriginal persons, immigrants and a mix of both urban and rural clients. Specific needs clients (e.g. literacy or hearing impaired) will not be excluded from invitation, and if interested in participating, they will be provided appropriate accommodations.

The Research Branch will establish the sample frame, and Regional Community Relations and Service Quality Managers will contact identified clients with the invitation to participating, and will use a scripted invitation to ensure consistency in the dialogue.

It is recognized that a blend of sampling methods may be needed based on regional needs, to ensure session capacity is maximized, e.g., potentially recruiting participants from office waiting rooms or via advocacy organizations, to achieve full session capacity. See Appendix B for more details on sample selection.

**Participation Costs:** Modest participation costs (e.g., providing lunch and coffee) and reimbursement for out-of-pocket costs (e.g., bus tickets, parking) are included in the project budget to support adequate levels of client participation.

**Proposed Target Questions:** The primary focus of these client focus groups sessions will be to introduce the online portal vision to clients, obtain their feedback on the online portal prototype (self-serve channel), including feedback about potential barriers and supports required to enhance client uptake.

Additionally, feedback will be obtained on client preferences, needs and decision-making criteria when choosing a service channel as well as information about our clients' needs for service channels.

Target questions for the client focus groups sessions are being developed with input also from Information Management Branch and Channel Strategy project leads, to ensure that questions will provide feedback needed to inform future channel decisions. See Appendix C for more information about proposed target questions.

**Timeline:** Preparations for client focus groups sessions have begun, with participants expected to be selected for the initial Region 2 and 3 session in early February. All of the proposed client focus group sessions, including final report, will be completed by the end of the fiscal year.

**CONCLUSION:**

Regional Operations will work with Berlin Eaton and a Steering Committee to finalize/refine all client focus group details. All proposed client focus groups, including the final report, will be completed by March 31, 2013.

GCPE has been briefed on this initiative, and will be updated once dates are set.

**CONSULTATIONS:**

Directors of Service Delivery and Community Relations and Service Quality Managers – Regional Services Division
Jeff Gauthier – Information Management Branch
David Hume – Citizen Engagement, Citizen Services and Open Government
Directors of Service Delivery (all regions)
Robert Bruce – Research Branch
Susan Mader – GCPE

**ATTACHMENTS:** Appendix A Steering Committee
Appendix B Sampling Issues and Options
Appendix C Draft Targeted Questions for Client Focus Groups

| Prepared by: | Reviewed By: | Initial: | Date: |
|---|---|---|---|
| Darcy Houston<br>Senior Project Management Officer<br>Regional Operations<br>(250) 356-6080 | Judy D'Gal<br>Director<br>Regional Operations | _____ | _____ |
| | Robert Bruce<br>Executive Director<br>Research Branch | _____ | _____ |
| | Janice Nakamura<br>Executive Director<br>Regional Operations | _____ | _____ |
| | Susan Mader<br>Communications Director<br>GCPE | _____ | _____ |
| | Sharon Moysey<br>Assistant Deputy Minister<br>Regional Services Division | _____ | _____ |

**Appendix A**

## STEERING COMMITTEE:

| | |
|---|---|
| **Regional Operations:** | |
| Janice Nakamura | Executive Sponsor |
| Judy D'Gal | Project Director |
| Terri Archer | Project Management Lead |
| Darcy Houston | Project Officer |
| Pardip Bandechha | Project Analyst |
| Jennifer Anholt | Channel Strategy Manager |
| Colleen Turner | Information Management Branch lead *(Client Online Portal)* |
| **Berlin Eaton - contracted facilitation agency:** | |
| Richard Eaton | Facilitator |
| Norma Glendinning | Facilitator |
| **MSD Regional Reps (Community Relations Service Quality Managers - CRSQs):** | |
| Jeannine Bousquet | Region 1 |
| Jean Lofthouse | Region 2 |
| Trent Brown | Region 3 |
| Harleen Price | Region 4 |
| Ian Harrower | Region 5 |

Page 319 to/à Page 320

Withheld pursuant to/removed as

s.13

BRITISH COLUMBIA

# Certificate of Appreciation

*Presented to*

(PARTICIPANT NAME)

***FOR PARTICIPATING IN THE [REGION] FOCUS GROUP AND PROVIDING FEEDBACK ON MINISTRY SERVICE DELIVERY CHANNELS***

**SHARON MOYSEY**
ASSISTANT DEPUTY MINISTER
MINISTRY OF SOCIAL DEVELOPMENT

DATE

# Welcome
# and
# Thank you for coming today

## Feedback Session

February 2013

BRITISH COLUMBIA | Ministry of Social Development

## *Opening*

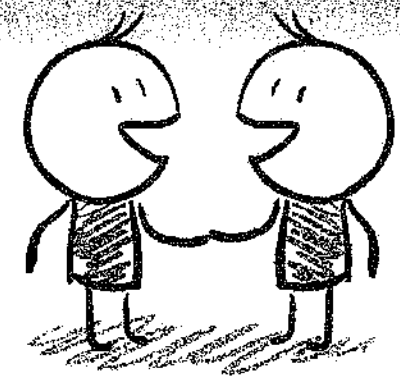
- Welcome and Introductions

Your Facilitators:

- Richard Eaton, Berlin Eaton
- Norma Glendinning, Berlin Eaton

Ministry Representatives

- Terri Archer, Project Lead (HQ Manager)
- Jean Lofthouse, Regional Manager



- Ground Rules

## *Ground Rules*

- Be open to other opinions/experience
- Speak only for yourself, not on behalf of others
- Be respectful (no interrupting)
- Please turn off electronics
- No "right" or "wrong" answers, just sharing of experiences
- Help others feel comfortable to participate
- Agree to disagree if needed
- Personal information will be kept confidential

## *Agenda*

| Time | Agenda Item |
|---|---|
| 10:00 am | Welcome and introductions |
| 10:10 am | Opening activities |
| 10:20 am | Ministry's current service channels |
| 10:30 am | Understanding the service delivery channels from the clients' point of view and opportunities for improvement |
| 11:40 am | Introduce online portal and get feedback |
| 12:00 pm | *Lunch (& open discussion welcome)* |
| 12:20 pm | Complete review of online portal (*while people eat*) |
| 1:00 pm | Design the future:<br>• Map redesigned of service channel processes<br>• Identify recommendations to MSD |
| 2:15 pm | Summary of actions and next steps |
| by 2:30 pm | Session Ends – Thank you |

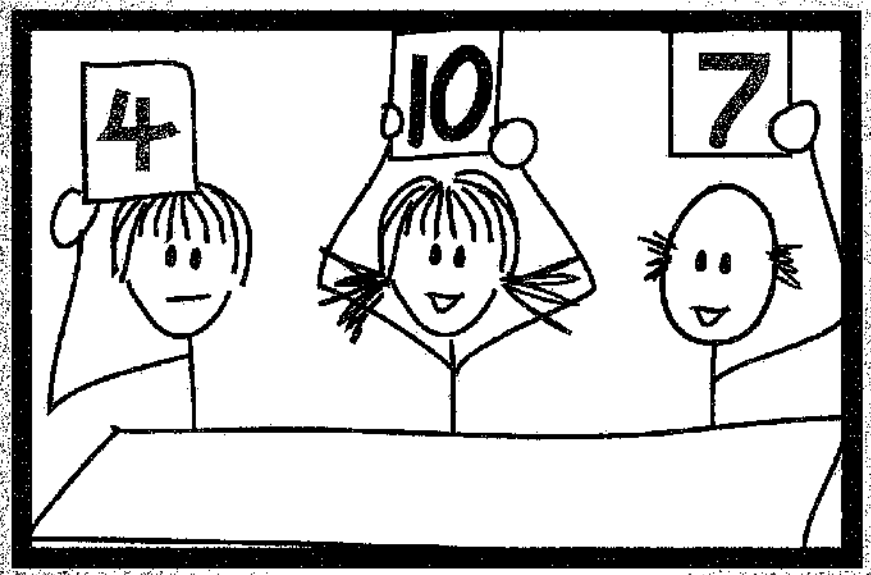
## *Ministry's Service Channels*

*Service Delivery As We Know It*

- The ministry currently provides a variety of options to citizens to access information, assistance and services.
- These options are referred to as 'service delivery channels'
- Channels and services provided by ministry staff include:
  - internet/online
  - telephone
  - face-to-face offices
  - mail
  - fax

## *We want to hear from you!*

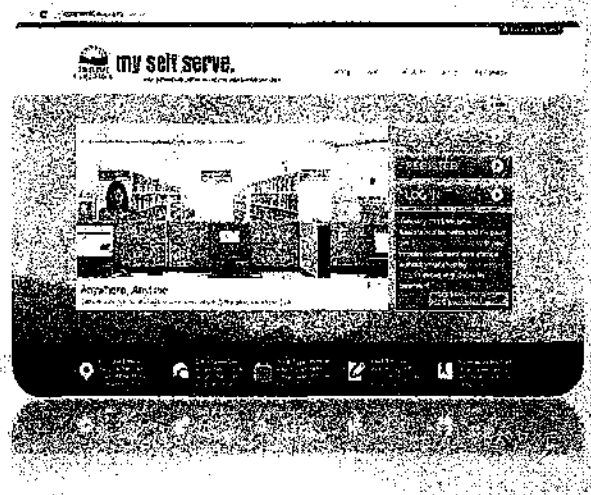
- Your first-hand experience as it relates to our service delivery
- Opportunity to share what is working well and also, what is not

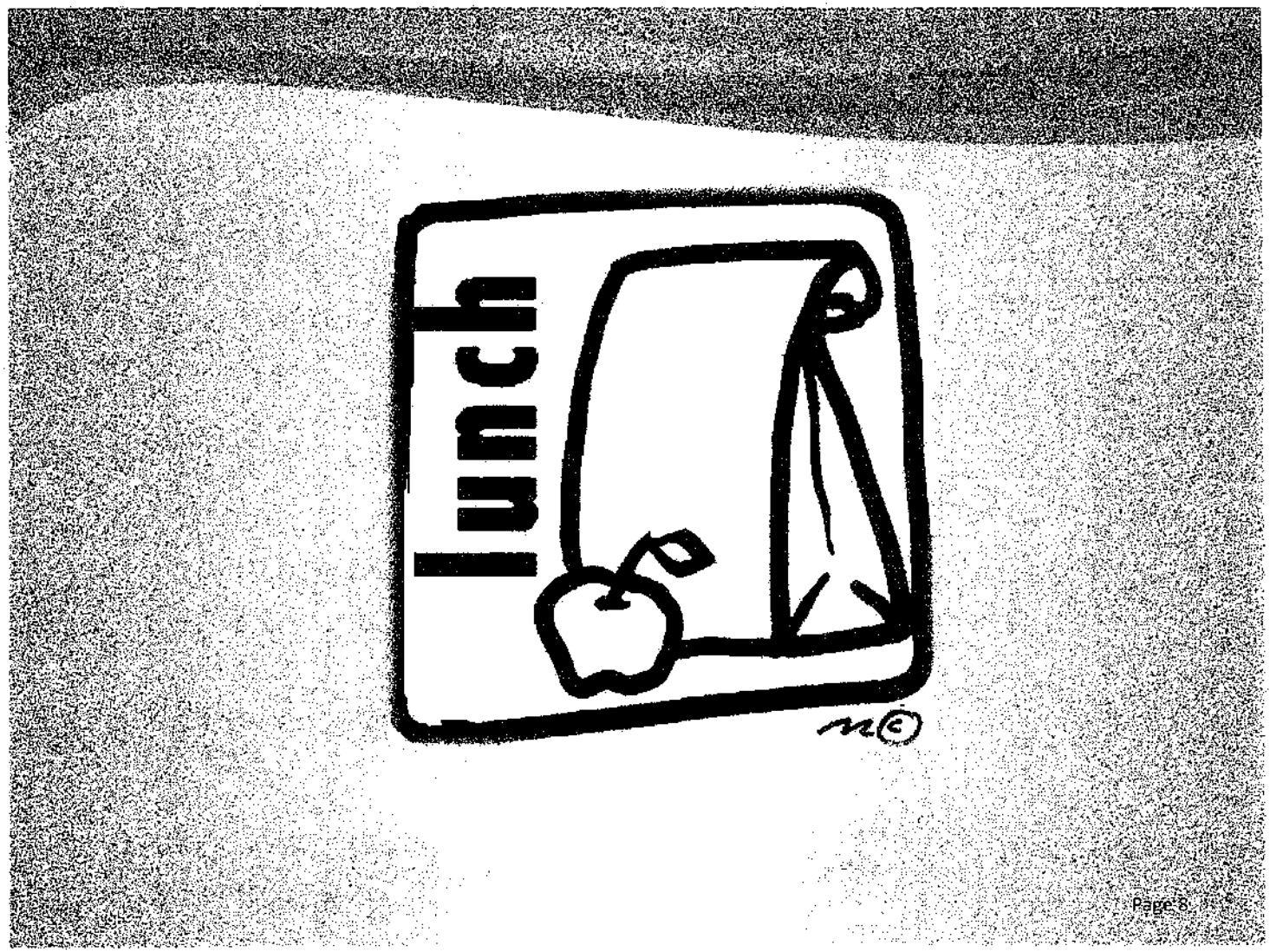


## Client Online Portal

*The Future of Service Delivery...*

# *Demo:*




lunch
Page 8

## *Help shape the future...*

Next Step

## Closing

## Client Consultation (Focus Group Sessions)

**Background:**

The ministry currently provides a variety of options to citizens to access information, assistance and services. The channels and services provided by ministry staff include: internet/online, telephone, face-to-face offices, mail, fax and e-mail requests, after hours unit provides access for urgent needs, outreach and integration services provided by specialised staff and Trusted Third Party partners.

**Purpose:**

The purpose of the focus group sessions is to consult with BCEA clients through focus groups, on each of the ministry's service delivery channels, including a proposed online client portal. Understanding the needs of our clients will help us to deliver programs, services, and supports that best address those needs.

**Objective:**

The objectives of the client focus groups are to:

- Introduce the online portal vision to clients
- Obtain feedback on the online portal prototype
- Understand the preferences, needs and decision-making criteria for clients in choosing a service channel
- Clarify opportunities for self serve channel, and barriers to access
- Identify support(s) required for self-serve channel
- Analyze and determine service delivery processes that are best suited, both for efficiency and effectiveness, to each type of channel
- Gain an understanding of what our clients' needs are for service channels

**Timing:**

The ministry is targeting for the majority of the focus group session to be held in late January – February 2013, and if needed early March 2013.

**Budget:**

$25,000 maximum (including travel and all other related expenses)

**Estimated Time Needed to Complete Project Scope:**

It is estimated that all sessions and the final report can be completed within a two week period.

**Deliverables for Contractors:**

- Pre-meeting with project sponsor to gain understanding of project scope.
- Review and provide input into draft agenda, probing/detailed questions (i.e., what made you choose this particular service channel?) and other meeting material (i.e., video of self serve portal).
- Deliver 5 – 12 sessions (each session anticipated to be approximately 2 hours) across the province to ministry clients including targeted groups (i.e., single parents, people with disabilities, aboriginal etc).
- Work with ministry staff to coordinate sessions.
- Produce a high level summary report which includes key learning/recommendations on each of the service delivery channels and summary of the discussions from the probing questions.
- Include input from a broad cross-section of our diverse caseload

Please provide us any **related experience** with similar consultations *(with regard to client consultation, service delivery, MSD).*

**We are considering two options:**

1. Holding focus group sessions across the province (minimum of one session in each of the 5 regions, or
2. Focusing on Regions 2 and 3 consultations only (restricting focus group sessions to the Fraser and Coastal regions)

Please provide us a **cost estimate** for both scenarios **by end of day Thursday, Dec. 20th latest** that includes:

- Any pre-work including meeting time with project sponsor, reviewing and providing input into agenda/meeting material
- Cost per session
- Travel cost estimate
- Report Cost
- Misc
- Recommendations for incentives for participants

Please confirm your availability for January – March 2013.

Attached is a **draft** agenda for context and background information.

Client Focus
Groups Draft Agen.

Page 335 to/à Page 338

Withheld pursuant to/removed as

s.13

# MySS Phase 4

## Client Engagement Sessions

### BACKGROUND

Local office services and the provincial contact centre are the traditional entry points for potential clients, moving willing and able clients to MySS is a necessary step in the modernization of service delivery and becoming more responsive to client needs (key goals of the Service Delivery Division Business Plan).

The External Stakeholder Engagement Plan of 2015/16 focusses on engaging clients and other external stakeholders for their feedback on our service delivery. Building on the Plan deliverables and in support of the My Self Serve Phase 4 and Modernization Plan, there is an opportunity to consult with applicants/clients on MySS Phase 4.

The Ministry is launching MySS Phase 4 which will combine the Self-Serve Assessment and Application (SSAA) and My Self Serve (MySS) into one platform to improve the online experience for citizens accessing ministry programs and services. The intent is to make the online application process modern, faster and more convenient. The ministry is looking to improve operational efficiency by leveraging technology to automate and streamline business processes where possible to create value for citizens, staff, external stakeholders and to the ministry.

### OPPORTUNITY

There is an opportunity to engage targeted applicants/clients in a face-to-face session that are completing application process at a local office Kelowna, Kamloops and Lower Mainland office. These client consultation are targeted towards:

- Market MySS, educate and highlight features of MySS and engage in Phase 4 enhancements for feedback.
- Obtain timely client feedback on MySS Phase 4 features and enhancements, including gathering feedback on on what works well and what challenges applicants/clients experience throughout the intake process
- Gather feedback on how the ministry can further use technology to support the application process (make it easier and more efficient)? Examples may include:
    - Ability to upload documents to the application
    - Ability for applicants to receive and reply to messages through MySS
    - Ability for the applicant to see the status of the application
- Enhance our understanding of our applicant/clients needs for the online service channel, including potential opportunities for service delivery improvements.

We will also assess meeting with other appropriate stakeholders (i.e., advocates and community agencies in the targeted areas.

# MYSS PHASE 4

## CLIENT ENGAGEMENT SESSIONS

### LINKAGES

- 2015-2016 Service Delivery Division Business Plan
- Stakeholder Engagement Plan2015/16
- MYSS Marketing Strategy
- Modernization/Technology Plan

### BUDGET

Travel would be covered through the XXXXXXXXXXXXXXXXXXXXXXXXXX.

| COSTS: | Details | Cost per | Total |
|---|---|---|---|
| Accommodations | 3 night | s.13 | |
| Transportation | BC Ferries<br>Mileage from Victoria to Lower Mainland, Kelowna, Kamloops KM | | |
| Per Diem | 5 days | | |
| Misc | Parking etc | | |
| Approximate TOTAL | | | $1445.00 |

### RECOMMENDATION

Approve request for approximately $1500 for multiple client engagement session in August 2016.

This initiative supports the goals of the Division Business Plan, the MYSS Marketing Strategy, and the Stakeholder Engagement and Information Technology strategies.

## DSD Feedback on Client Focus Group Plan – Jan. 11, 2013

**From:** Archer, Terri MSD:EX **Sent:** Friday, January 11, 2013 1:44 PM
**To:** Anderson, Frances MSD:EX; Beardmore, Paul MSD:EX; Gault, Jeanette C MSD:EX; Gray, Allen G MSD:EX; Harrison, Susan M MSD:EX; Randhawa, Inderjit K MSD:EX; Treger, Matthew T MSD:EX
**Cc:** Nakamura, Janice N. MSD:EX **Subject:** Feedback request (for Monday please) re: client focus group plan
**Importance:** High

Hello DSDs, I know you are tied up next week so I thought I'd email you instead of trying to coordinate a meeting.

As mentioned on the last SOEC call, I am finalizing a plan for the **upcoming client focus group sessions** that have been approved (through DN that includes contracted facilitation), and I am seeking your feedback on the proposed plan.

We selected Berlin Eaton for the contracted facilitation based on their related experience and detailed proposal. This agency conducted very similar facilitation for the ministry in 2006 involving HAB and personal supports and one of the facilitators used to work for the ministry. He demonstrated in the proposal a very clear understanding of the business, regions, and governance of the ministry.

**Based on HQ's input, Berlin Eaton's recommendations, and consultation with Citizen Services/Citizen Engagement, we are proposing the following plan for the client focus groups:**

- Steering Committee develops a common understanding of project scope, deliverables and timelines. Committee also assesses and adjusts focus group sessions as they progress to ensure goal will be met.
- Conduct focus group sessions in Regions 2 & 3 to start (based on caseload diversity and recent advocate focus group session for those Regions)
- Conduct focus group sessions in Regions 4 & 5
- Conduct focus group session in Region 1 (as finishing locally will provide greater control in terms of remaining budget)
- Focus group sessions would include a minimum of 1 per region each with a target of 12 client participants, the facilitators, and 1-3 ministry reps (combination of local and from HQ, if viable, for ministry connection, continuity of experience, and to develop a strong understanding of the issues and opportunities from the perspective of the clients)
- Sessions include lunch, consideration for travel support where needed (i.e. bus ticket, parking), and may include an additional modest incentive if deemed needed/appropriate by Steering Committee
- Target participants: representation of a fairly broad cross section of clients with consideration to greatest proportion of client caseload who continually access services
    - Rob Bruce has agreed to identify/draw samples for contact and invitation to participate

**I would really appreciate your feedback on this plan by end of day Monday please, including any questions, concerns and further recommendations.**

Unfortunately there is a tight timeline given the need for a finalized Information Note, working with the contractor on final details starting next week, and conducting these focus group sessions before end of fiscal.

Thank you in advance for your feedback and support.

**DSD RESPONSES:**

**Region 1** (Jeanette Gault)

I really like this approach. I look forward to additional information as time goes on, and, if appropriate, I continue to be interested in the focus group sessions. Should you need a hand in Region 1, just holler.

**Region 2** (Frances Anderson)

The plan looks good, please let me know if you need further information. Thanks.

**Region 3** (Inderjit Randhawa)

I have reviewed the information below and really like the plan. If you require information specific to Region let me know and I can have one of our CRSQ provide that for your steering committee. Who are you considering to be the local rep for the Ministry would it be from the front line or a Manager?

**Supports doing focus groups separately in each region due to significant variation in client demographics and to ensure a fulsome range of feedback; also appeals to advocates to consult across the province.**

Demographics, even just within Regions 2 & 3, include immigration population, DTES, and area-specific mentalities and issues.

Lynn Boule - Agrees – region 2 and 3 is a bit of a microcosm and we need feedback from more rural and/or smaller areas as well to get a balance.

**Region 4** (Allen Gray & Matt Treger)

Looks great. Quite interested in what we will hear from our clients. (Allen)

I'm very excited to see efforts made by the Ministry to received direct feedback from clients. The overall plan looks good. My one comment would be to raise with the Steering Committee the required number of Ministry reps in each session. My concern would be to keep this at a minimum in an effort to ensure that there is no bias or influence to the feedback given by clients. There would be an inherent conflict, given the clients/participants may perceive the Ministry reps as having decision making authority over their continued entitlement to benefits. Any help required with implementation, don't hesitate to contact me. (Matt)

Lynn Boule - Agrees – it will limit the power imbalance between clients and Ministry

**Region 5** (Susan Harrison)

...your proposal looks just fine to me and if you need any assistance setting things up in Region 5, please don't hesitate to contact myself of Ian Harrower, CRSQ. Thanks much!

**HAB** (Paul Beardmore)

- Indy fully supports doing focus group sessions in each region to ensure fulsome feedback, to appease advocates, and to capture client feedback in various demographics.

Lynn Boule - Essentially, I am agreeing that we need to keep ministry reps to the minimum and that all regions should have some client participation. Your approach is a good one and I definitely concur that we need to make this as non threatening as possible. Although we have some quite assertive clients, we may get the best and most un biased information from the "middle of the road" type of client.

## Client Focus Group Sessions (and Staff Presentations)

| Region | Date & Time | City | Meeting Venue Location | Staff Consultation | MSD Staff Involved | Location |
|---|---|---|---|---|---|---|
| 1. Vancouver Island | March 12<br>10:00 – 2:30 | Nanaimo | City of Nanaimo<br>*Bowen Clubhouse*<br>500 Bowen Rd<br>Nanaimo BC V9R 1Z7 | No | **Jeannine Bousquet** | |
| | March 13<br>10:00 – 2:30 | Victoria | Greater Victoria Library<br>Central Meeting Room<br>735 Broughton St<br>Victoria BC V8W 3H2 | No | **Pardip Bandechha** | |
| 2. Vancouver Coastal | February 13<br>10:30 – 3:00 | Vancouver | Vancouver Library<br>*Morris J. Wosk Boardroom*<br>350 West Georgia St<br>Vancouver BC V6B 6B2 | **Yes** | **Jean Lofthouse**<br>Darleen Walker (DSD) | Office 251 and 254 - Vancouver<br>Supervisors:<br>Christina Jagpal and Rita Karajaoja |
| | March 25<br>10:00 – 2:30 | Vancouver | Vancouver Library<br>*Morris J. Wosk Boardroom*<br>350 West Georgia St<br>Vancouver BC V6B 6B2 | No | **Kashmir**<br>Pardip | |
| 3. Fraser | February 14<br>10:00 – 2:30 | Surrey | Surrey Kwantlen Campus<br>*Cedar Room 2105*<br>12666 72nd Avenue<br>Surrey BC V3W 2M8 | **Yes** | **Trent Brown**<br>Denise Seder | Office 326 - Surrey<br>Supervisor:<br>Cathy Walker |
| 4. Interior | February 26<br>10:00 – 2:30 | Kelowna | John Howard Society<br>*Multi Purpose Room*<br>1440 St. Paul Street<br>Kelowna BC V1Y 2E6 | **Yes** | **Harleen Price**<br>Angie Fry | Office 434 – Kelowna<br>Supervisors:<br>Maryann Cargo and Janet Williamson |
| 5. North | Feb. 28, 2013<br>10:00 – 2:30 | Prince George | Prince George Native Friendship Centre<br>*Circle of Unity Room*<br>1600 - 3rd Avenue<br>Prince George, BC V2L 3G6 | **Yes** | **Ian Harrower** | Office 585 – Prince George<br>Supervisors:<br>Ron Carter |

## Ministry of Social Development Channel Strategy
## Region 2 Client Focus Group: Vancouver

**Date and Timing:** 10:00am to 2:30pm – Monday, March 25, 2013

**Purpose:** To obtain feedback on existing service channels as well as a new online client portal.

**Location:** Library Square Conference Centre – Vancouver Public Library, 350 West Georgia (Peter Kaye room)

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10.00am | Welcome and introductions | Elaine Cross |
| 10.30 am | Introduce Ministry's Channel Strategy | Terri Archer |
| 10.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement:<br>• Face to Face<br>• Phone<br>• Online e.g., Self-Serve Assessment and Application<br>• Other:<br>  o Mail<br>  o Fax<br>  o Email | Elaine Cross |
| 11.30am | Presentation of Ministry Website and Client Online Portal demos and obtain feedback | Terri Archer (*demos*)<br>Elaine Cross (*feedback*) |
| 12.00pm | Lunch | |
| 12.15pm | Online demos cont'd | Terri |
| 1.00pm | Predicting the Future *(Rate your desire to use this channel in the future)* | Elaine Cross |
| 2.15pm | Summary of actions and next steps<br>• hand out session survey<br>• invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Elaine Cross |
| By 2.30pm | Closing remarks and adjourn | Terri Archer |

## Attendance

- [x] clients attended
  - [x] volunteered to stay involved with the project and be contacted in follow-up

## Feedback on the Service Channels

***Key Themes:***

•

### Phone

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>Average Rating: [x] | |

### Face to Face

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Online**

***Key Theme*:**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Email**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating:** | |

**Mail**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

Fax

| Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?<br><br>Average: | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| On a scale between 1 and 10, please rate your desire to use this channel in the future:<br><br>Average Rating: [x] | |

**General Comments:**

- Differentiating needs would be better; easy and quick access to temporary support would be great.
- How do I know if a decision is worker error or discretion?

**Summary of Ratings from Above**

| | Current Satisfaction with Channel | Desire to Use Channel in the Future |
|---|---|---|
| Face-to-Face | | |
| On-line | | |
| Telephone | | |
| Email | | |
| Fax | | |
| Mail | | |

## Client Online Portal Presentation and Feedback

### General Feedback

- Don't lose information on current website.
- Consider surveying clients on use of computers
- Need ministry contact information somewhere on the portal
- Make it compatible for Smart phones
- Each page should have links to previous pages

**1. Launch Page**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**2. How to and FAQ's**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**3. Browse Resources?**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**4. Find a Form**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 5. Find an office

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

### 6. Your Account

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

### 7. Message Board

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

### 8. Submit a document

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

•

### 9. Ask a question online

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

## Output from Service Channel Exercise (Morning and Afternoon)

[attach any session photos]

## Post Session Survey Results

The Post Session Survey was administered to the participants at the end of the workshop. The purpose of this survey is to provide feedback and information to incorporate into planning activities for future sessions and meetings. Information gathered fall into the following categories:

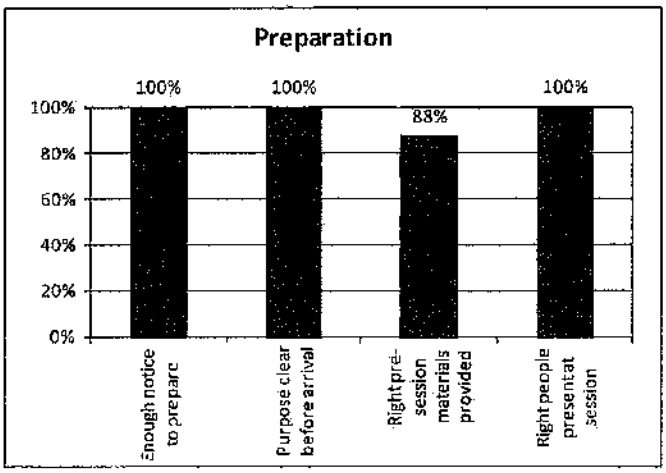
- Overall Score out of 10
- Preparation
- Agenda
- Delivery
- Results

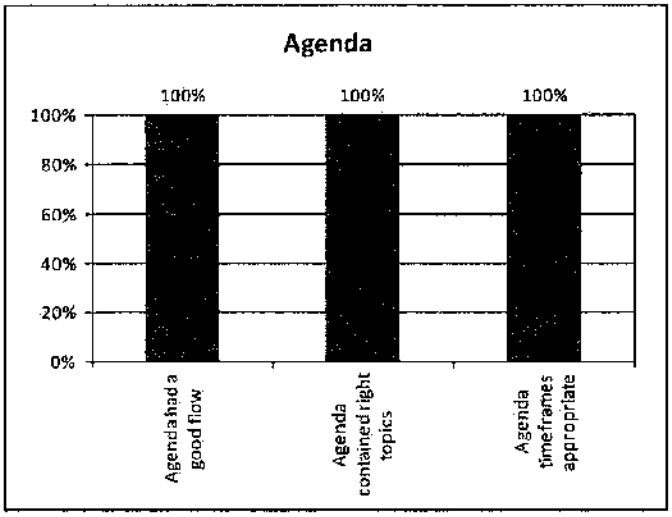
The graphed results report the percentage of respondents that agree (scoring either 4 or 5), to a series of statements related to their perception of how they viewed the session. Any scores where less than 80% agree are generally noted for future action.

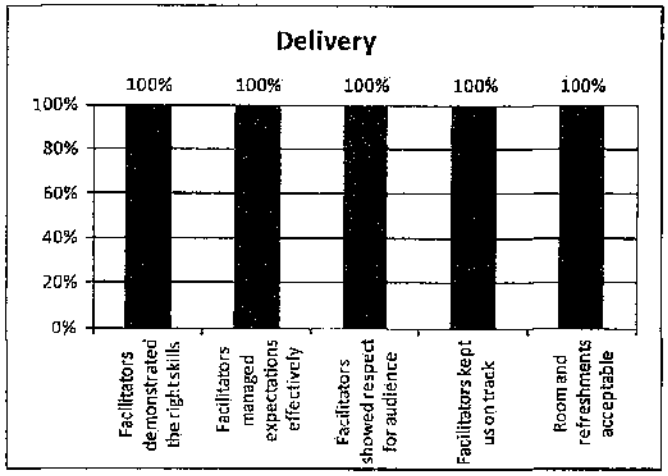
The total number of responses was 8.

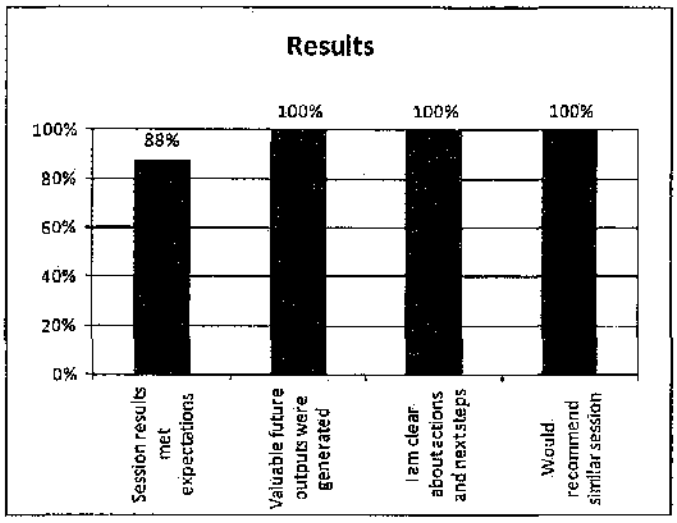
The overall score out of 10 was 9.3, or 93%.

**Survey Responses**






## Written Comments

**My most significant learning from this workshop was:**

•

**Future workshops like this could be improved by:**

•

**Other comments:**

•

## Ministry of Social Development Channel Strategy
## Region 2 Client Focus Group: Vancouver

**Date and Timing:** 10:00am to 2:30pm – Monday, March 25, 2013

**Purpose:** To obtain feedback on existing service channels as well as a new online client portal.

**Location:** Library Square Conference Centre – Vancouver Public Library, 350 West Georgia (Peter Kaye room)

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10.00am | Welcome and introductions | Elaine Cross |
| 10.30 am | Introduce Ministry's Channel Strategy | Terri Archer |
| 10.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement:<br>• Face to Face<br>• Phone<br>• Online e.g., Self-Serve Assessment and Application<br>• Other:<br>  o Mail<br>  o Fax<br>  o Email | Elaine Cross |
| 11.30am | Presentation of Ministry Website and Client Online Portal demos and obtain feedback | Terri Archer (*demos*)<br>Elaine Cross (*feedback*) |
| 12.00pm | Lunch | |
| 12.15pm | Online demos cont'd | Terri |
| 1.00pm | Predicting the Future *(Rate your desire to use this channel in the future)* | Elaine Cross |
| 2.15pm | Summary of actions and next steps<br>• hand out session survey<br>• invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Elaine Cross |
| By 2.30pm | Closing remarks and adjourn | Terri Archer |

## Attendance

- [x] clients attended
  - [x] volunteered to stay involved with the project and be contacted in follow-up

## Feedback on the Service Channels

***Key Themes:***

•

### Phone

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

### Face to Face

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Online**

***Key Theme*:**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Email**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating:** | |

**Mail**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

Fax

| Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?<br><br>Average: | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| On a scale between 1 and 10, please rate your desire to use this channel in the future:<br><br>Average Rating: [x] | |

**General Comments:**

- Differentiating needs would be better; easy and quick access to temporary support would be great.
- How do I know if a decision is worker error or discretion?

**Summary of Ratings from Above**

| | Current Satisfaction with Channel | Desire to Use Channel in the Future |
|---|---|---|
| Face-to-Face | | |
| On-line | | |
| Telephone | | |
| Email | | |
| Fax | | |
| Mail | | |

## Client Online Portal Presentation and Feedback

### General Feedback

- Don't lose information on current website.
- Consider surveying clients on use of computers
- Need ministry contact information somewhere on the portal
- Make it compatible for Smart phones
- Each page should have links to previous pages

**1. Launch Page**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**2. How to and FAQ's**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**3. Browse Resources?**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

**4. Find a Form**

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 5. Find an office

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 6. Your Account

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 7. Message Board

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 8. Submit a document

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 9. Ask a question online

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### Output from Service Channel Exercise (Morning and Afternoon)

[attach any session photos]

### Post Session Survey Results

The Post Session Survey was administered to the participants at the end of the workshop. The purpose of this survey is to provide feedback and information to incorporate into planning activities for future sessions and meetings. Information gathered fall into the following categories:

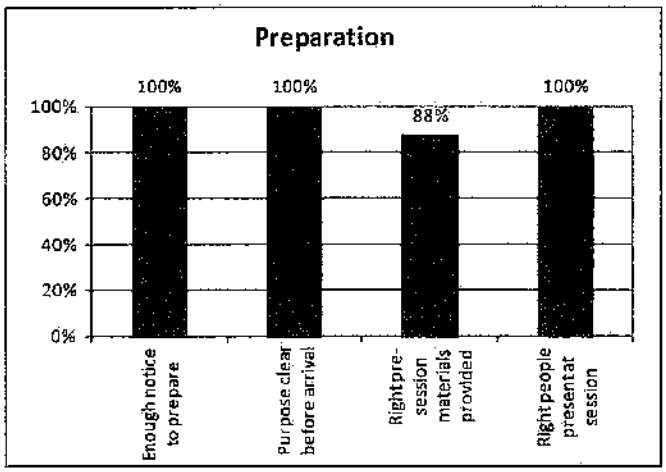
- Overall Score out of 10
- Preparation
- Agenda
- Delivery
- Results

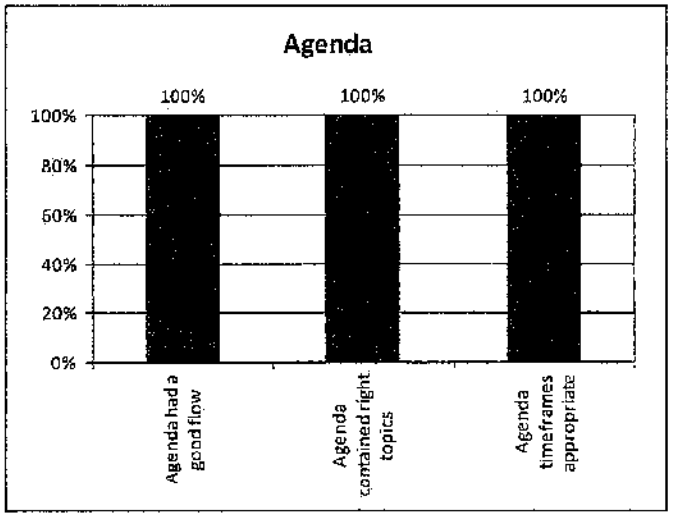
The graphed results report the percentage of respondents that agree (scoring either 4 or 5), to a series of statements related to their perception of how they viewed the session. Any scores where less than 80% agree are generally noted for future action.

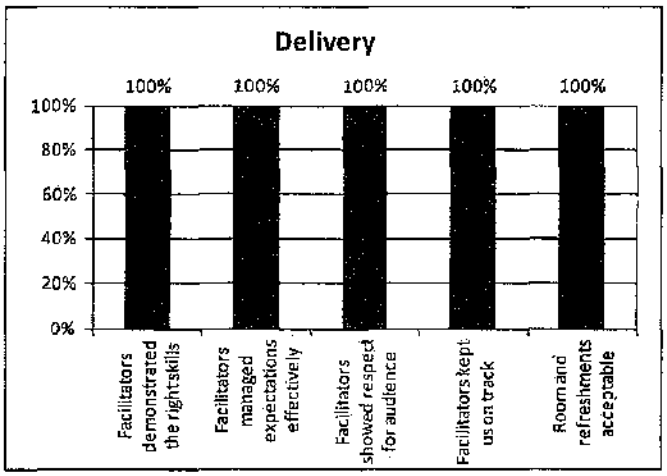
The total number of responses was 8.

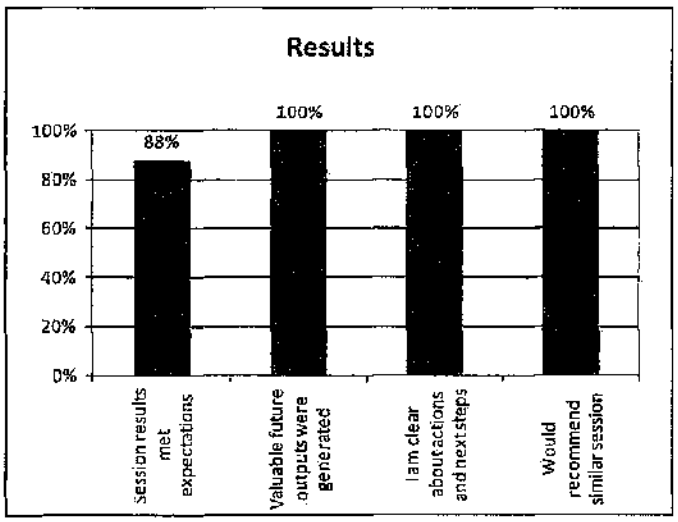
The overall score out of 10 was 9.3, or 93%.

**Survey Responses**






**Written Comments**

**My most significant learning from this workshop was:**

•

**Future workshops like this could be improved by:**

•

**Other comments:**

•

# PRIVACY IMPACT ASSESSMENT

## I. BASIC INFORMATION – (New Project) CLIENT ENGAGEMENT – Client Focus Groups

**1. Ministry/Public Body and Program Area.**

| | |
|---|---|
| Ministry | Social Development |
| Division | Regional Services |
| Branch/Section | Regional Operations |
| Initiative Title | Client Focus Groups |

**2. Contact Position and/or Name, Telephone Number and E-Mail Address.**

| | |
|---|---|
| Name, Title | Darcy Houston, Senior Project Management Officer |
| Branch/Section | Regional Operations |
| Phone Number | 250 956-6060 |
| E-Mail | Darcy.Houston@gov.bc.ca |

**3. Description of the Program/System/Legislation (initiative) being assessed.**
The purpose of this project is to conduct client focus groups to gather feedback on the ministry's service delivery channels, including a proposed online self-serve client portal.

Focus group participants will be identified from existing ministry clients, using existing information to select and contact clients. As well, client selection is intended to ensure that focus groups adequately represent the caseload as a whole, e.g., to ensure representation by single parents, by persons with disabilities, by Aboriginal persons, urban vs. rural participants, etc. Information on the broad composition of the focus groups may be retained for reporting purposes, e.g., to indicate that various segments of the caseload were adequately represented on the focus groups; however, such information will not be linked to identifiable individuals.

Focus groups will be conducted by a contracted facilitator. Feedback will not be attributed to specific participants in focus group reporting. The following information will be collected from focus group members: their perceptions, responses and opinions on various service delivery channels, including their recommendations for improvement and/or further development of the proposed online self-serve channel. This feedback may include comments on focus group members' previous experiences using different channels.

Focus group participants may be asked if they wish to be contacted for follow-up after the groups are complete. This would be strictly voluntary. Those participants who wish to be contacted would be asked to self-identify and provide contact information for follow-up purposes.

| | | Yes | No |
|---|---|---|---|
| (a) | Does this PIA involve a common or integrated program/activity (as defined in the FOIPP Act)?<br>and | | X |
| | Is the common or integrated program/activity confirmed by the written requirements set out in the regulation? | | X |
| (b) | Does this PIA involve a data-linking initiative (as defined in the FOIPP Act)? | | X |

**If yes, please ensure you have notified the Office of the Information and Privacy Commissioner at an early stage of development of the initiative pursuant to section 69 (5.5) of the FOIPP Act.**

4. **Purpose/Objectives of the initiative (if statutory, provide citation).**

Focus groups are being conducted to obtain client input on the ministry's service delivery channels, including the proposed online client portal. This information will be used to inform improvements to service delivery channels, and further development of the proposed online client portal.

5. **What are the potential impacts of this proposal? (Include privacy impacts in this description).**

Selected clients will be contacted to determine if they wish to participate in focus groups. Neither participating nor declining to participate will affect the client's eligibility for assistance in any way.

Those clients that choose to participate will provide feedback on service delivery channels and on the proposed online client portal. Client feedback on service delivery channels will be used to identify potential quick wins that may improve service delivery. Timely feedback on the portal will ensure that ongoing development efforts generate a product that is relevant and accessible to a broad cross section of clients.

6. **Provide details of any previous PIA or other form of personal information assessment done on this initiative (in whole or in part).**

N/A

**IF THERE IS NO PERSONAL INFORMATION INVOLVED, GO TO X. SIGNATURES.**

**"IMPORTANT NOTE: The FOIPP Act defines personal information as "recorded information about an identifiable individual other than contact information." Contact information includes the name, title, telephone or facsimile number, email address etc., which enables an individual at a place of business to be contacted.**

## II DESCRIPTIVE INFORMATION

1. **Describe the elements of personal information that will be collected, used and/or disclosed and the nature and sensitivity of the personal information. [See note above about the definition of personal information.]**
*For example: Name, home address, gender, age/birthdate, SIN, Employed, race/national, ethnic origin.*

Name, address, telephone number, Health and Safety alerts, special requirements, and other information on client file that would preclude their participation in a 3.5 hour focus group session.

2. **Provide a description (either a narrative or flow chart) of the linkages and flows of personal information collected, used and/or disclosed.**

Existing client data will be accessed to identify a sample of potential focus group participants within a reasonable distance from focus group locations, as determined by postal code. From this existing client data, name and contact information will be pulled for a sample of 60-75 clients, excluding clients with any types of alerts on file (e.g., Health and Safety alerts).

The list of potential participants will be password protected and sent by email within the government network to the individuals making the contact calls. The password for the list will be provided through a separate channel, e.g., by telephone or via Microsoft Office Communicator.

The individual making the calls will then further refine the list of potential participants using existing client data to: a) identify any special requirements that require pre-planning for telephone contact (e.g., need for an interpreter or TTY device for hard-of-hearing clients); and b) exclude clients whose circumstances would make an invitation to participate inappropriate (e.g., infirm clients with end-stage terminal illness).

Invitations will be made by telephone, following a script to ensure consistency. Potential participants will be advised during the invitation call that their participation or refusal to participate will not affect their eligibility for assistance in any way. Clients who wish to participate will receive a reminder call the day prior to the focus group.

Clients who self-identify during the invitation call as wanting to participate but unable to attend a focus group in person may be asked if the ministry can provide their contact information to the facilitator. If the client consents, the facilitator will be provided with the client's name and telephone number to follow up by telephone to obtain the client's feedback.

Clients who make requests for assistance during the invitation calls or at the sessions will be referred to the ministry's toll-free number for assistance.

Client contact information will also be used to produce letters of thank-you and certificates of participation, to be handed out to attendees at the focus groups. Letters / certificates for clients unable to attend after confirming will be shredded. Letters and certificates for clients who participate by telephone will be mailed. Distribution of letters and certificates will be handled by ministry staff members.

At the focus group, participants will be asked if they wish to receive follow-up contact after the focus groups are completed. Those that do so will be asked to provide their names to ensure that only those clients desiring follow-up contact are actually contacted.

Following the focus group sessions, personal client information will not be retained, except as noted above for follow-up activities in which the client opts to participate.

## III PERSONAL INFORMATION COLLECTION

(Section 26 and section 27 of the *Freedom of Information and Protection of Privacy Act* "FOIPP Act")

**IMPORTANT NOTE:** Recent amendments to the FOIPP Act have clarified when personal information has *not* been collected by a public body. See section 27.1 or contact Knowledge and Information Services for further details.

| | Yes | No | n/a |
|---|---|---|---|
| Is personal information being collected? | ✓ | | |

**IF THERE IS NO PERSONAL INFORMATION BEING COLLECTED, GO TO IV. USE OF PERSONAL INFORMATION**

1) **Authorization for Collection:**

A public body may collect personal information as authorized by one of the following provisions:

| s. 26 | | Yes | No | n/a |
|---|---|---|---|---|
| (a) | Is the collection of personal information specifically authorized by, or under, an Act, other than the FOIPP Act? | | ✓ | |
| | **If yes, please specify the name of the Act and relevant section** | | | |
| (b) | Is the personal information being collected for law enforcement purposes? | | ✓ | |
| (c) | Is the personal information directly related to, and necessary for, a program or activity of the public body? | ✓ | | |
| (d) | Is the personal information being collected for a prescribed purpose (where there is a regulation defining that purpose)? | | | ✓ |
| | **If yes, please specify the prescribed purpose.** | | | |
| | (i) Has the individual whose personal information is being collected consented, in the prescribed manner, to that collection? **and** | | | ✓ |
| | (ii) Would a reasonable person consider that collection appropriate in the circumstances? | | | |
| (e) | Is the collection of personal information necessary for the purposes of planning or evaluating a program or activity of a public body? | ✓ | | |
| (f) | Is the collection of personal information necessary for the purpose of reducing the risk that an individual will be a victim of domestic violence, if domestic violence is reasonably likely to occur? | | | ✓ |
| (g) | Is the personal information being collected by observation at a presentation, ceremony, performance, sports meet, or similar event where the individual voluntarily appears and that is open to the public? **Please identify event:** | | ✓ | |
| (h) | Is personal identity information being collected by: | | | |

| s. 26 | | Yes | No | n/a |
|---|---|---|---|---|
| | A designated provincial identity information services provider and the collection of the information is necessary to enable it to provide services under section 69.2,<br>or | | ✓ | |
| | A public body from a designated provincial identity information services provider and the collection of the information is necessary to enable the public body to identify an individual for the purposes of providing a service to the individual or the provincial identity information services provider to provide services under section 69.2. | | ✓ | |

**If none of the above questions has been answered "yes", your office does not have the authority under the FOIPP Act to collect the personal information in question. If you have any questions or require clarification please contact Knowledge and Information Services.**

**2) How will the personal information be collected?**

A public body must collect personal information directly from the individual the information is about, with certain specific exceptions.

| | Yes | No | n/a |
|---|---|---|---|
| Will the personal information be collected directly from the individual that the information is about? | ✓ | | |

**IF YOU ARE ONLY COLLECTING PERSONAL INFORMATION DIRECTLY AS NOTED ABOVE, YOU WILL NOT NEED TO COMPLETE THE NEXT SECTION ON INDIRECT COLLECTION. GO TO 3. NOTIFICATION TO COLLECT INFORMATION.**

If the personal information has not been collected directly from the individual it is about, check which of the following authorizes the indirect collection:

| s. 27(1) | | Yes | No | n/a |
|---|---|---|---|---|
| (a)(i) | Did the individual the information is about authorize another method of collection? | | | |
| (a)(ii) | Has indirect collection been authorized by the Information and Privacy Commissioner? | | | |
| (a)(iii) | Has indirect collection been authorized by another enactment? | | | |
| | If yes, please specify the name of the Act and relevant section(s) | | | |
| (a.1)(i) | Is the personal information necessary for the medical treatment of an individual and it is not possible to collect the information directly from that individual? | | | |
| (a.1)(ii) | Is the personal information necessary for the medical treatment of an individual and it is not possible to obtain authority under (iv) for another method of collection? | | | |
| (b) | Is the public body collecting personal information disclosed to it by another public body under an authority within sections 33 to 36 of the FOIPP Act? | | | |
| | Specify relevant section(s) or subsections that apply. | | | |

| s. 27(1) | | Yes | No | n/a |
|---|---|---|---|---|
| (a)(i) | Is the personal information being collected for the purpose of determining suitability for an honour or award including an honorary degree, scholarship, prize or bursary? | | | |
| (a)(ii) | Is the personal information being collected for the purpose of a proceeding before a court or a judicial or quasi-judicial tribunal? | | | |
| (a)(iii) | Is the personal information being collected for the purpose of collecting a debt or fine or making a payment? | | | |
| (a)(iv) | Is the personal information being collected for the purpose of law enforcement? | | | |
| (a)(v) | Is the personal information being collected to reduce the risk that an individual will be a victim of domestic violence, if domestic violence is reasonably likely to occur? | | | |
| (d) | Is the personal information being transferred to the public body from another public body in accordance with section 27.1? | | | |
| (e) | Is the personal information being collected necessary for delivering a common or integrated program or activity? | | | |
| (f) | Is the personal information about an employee, other than a service provider, and the collection of the information is necessary for the purposes of managing or terminating an employment relationship between a public body and the employee? | | | |
| (g) | Is the information personal identity information that is collected by the designated provincial identity information service that is necessary to provide services under section 69.2? | | | |
| | | | | |
| | | | | |
| | Additional details as required (e.g., explanation of method of collection) | | | |

***If none of the above authorities have been checked, your office does not have the authority under the FOIPP Act to collect the personal information in question.*** If you have any questions or require clarification *please contact Knowledge and Information Services.*

3) Notification to collect information

A public body must ensure that an individual from whom it collects personal information is notified of the collection as outlined below.

| 27(2) | | Yes | No | n/a |
|---|---|---|---|---|
| | Has the individual from whom personal information is being collected, been informed of: | | | |
| | (a) the purpose for collection? | ✓ | | |
| | (b) the legal authority for collection? | ✓ | | |
| | (c) the contact information of the person who can answer questions regarding the collection? | ✓ | | |

| 27(2) | | Yes | No | n/a |
|---|---|---|---|---|
| | **Additional details as required (e.g., method of notification)**<br>Focus group participants will be asked to self-identify if they are interested in being contacted by the ministry in future to provide follow-up feedback in relation to the topics covered in the focus group session. If they consent to follow-up, they will be asked to provide their name and contact number to the ministry staff member at the session, which will be retained in confidence and used for the expressed purpose only. Notification of the authority for and purpose of information collection will be included on the form which clients will be asked to sign if they opt in to receive follow-up. | | | |

**Notification is not required if the answer is "yes" to any of the following:**

| 27(3) | | Yes | No | n/a |
|---|---|---|---|---|
| (a) | Is the personal information about law enforcement or anything referred to in section 15(1) or section 15(2) of the FOIPP Act? | | ✓ | |
| (b) | Has the Minister responsible for the FOIPP Act excused your public body from complying because it would | | | |
| | (a) result in the collection of inaccurate information? | | ✓ | |
| | or<br>(b) defeat the purpose or prejudice the use for which the personal information is collected? | | ✓ | |
| (c) | The information<br>(a) is not required, under subsection 27(1), to be collected directly from the individual the information is about, and<br>(b) is not collected directly from the individual the information is about | | ✓ | |
| (d) | Is the information collected by observation at a presentation, ceremony, performance, sports meet or similar event at which the individual voluntarily appears and that is open to the public;<br>Please identify event: | | ✓ | |
| 27 (4) | Is it reasonable to expect that notifying an employee of collection under subsection 27 (1) (f) would compromise<br>(a) the availability or accuracy of the information, or<br>(b) an investigation or a proceeding related to the employment of the employee? | | ✓ | |
| | Additional details as required | | | |

***If you have not provided the required notification as outlined above, please contact Knowledge and Information Services.***

## IV USE OF PERSONAL INFORMATION - (Section 32 of the FOIPP Act)

| | Yes | No | n/a |
|---|---|---|---|
| Is personal information being used? | ✓ | | |

IF THERE IS NO PERSONAL INFORMATION BEING USED, GO TO V. DISCLOSURE OF PERSONAL INFORMATION

***Under the FOIPP Act, a public body may use personal information in its custody or under its control only for certain specified purposes as outlined below.***

The public body must check one or more of the authorities listed below:

| s.32 | | Yes | No | n/a |
|---|---|---|---|---|
| (a) | Has the individual the personal information is about consented to the use?<br>(Note: Supporting documentation must be on file.) | | ✓ | |
| (b) | Will the information be used only for the purpose for which it was obtained or compiled or for a use consistent with the original purposes? | ✓ | | |
| | **Please provide details of the original purpose for which the personal information was obtained or compiled. Include, if applicable, details of the consistent/secondary use.**<br>Information was collected for the purposes of determining initial and ongoing eligibility for income assistance. Information is being used to evaluate service channels for delivery of income assistance services. Information will also be used for a follow-up conversation with those clients who opt in to receive follow-up. | | | |
| (c) | If the personal information was disclosed to the public body by another public body under an authority within sections 33 to 36, is the information being used for that same purpose? | | | ✓ |
| | **Specify subsection(s) being applied** | | | |

***If you have not checked one of the above, you do not have the authority to use the information.*** If you have any questions or require clarification ***please contact Knowledge and Information Services.***

## V DISCLOSURE OF PERSONAL INFORMATION

(Section 33, section 33.1, section 33.2, section 33.3, section 34, section 35 and section 36 of the FOIPP Act)

| | Yes | No | n/a |
|---|---|---|---|
| Is personal information being disclosed? | | ✓ | |

IF THERE IS NO PERSONAL INFORMATION BEING DISCLOSED, GO TO VI. ACCURACY AND CORRECTION OF PERSONAL INFORMATION.

***A public body may disclose personal information in its custody or under its control only as permitted under sections 33.1, 33.2, or 33.3 of the FOIPP Act.***

1) Disclosure of Personal Information

Sections 33, 33.1, 33.2 and 33.3 of the FOIPP Act provide the legislative authority to disclose personal information. Section 33 provides that personal information cannot be disclosed unless it is authorized under section 33.1 or 33.2.

**Please choose the main authorization(s) for disclosure below. All authorities that may apply do not need to be checked, only the main authorizations for the initiative.**

| s. 33.1 | Disclosure inside OR outside Canada | Yes | No | n/a |
|---|---|---|---|---|
| (1)(a) | In accordance with Part 2 (pursuant to an FOI request) | | | |
| (1)(a.1) | If the information or disclosure is of a type described in section 22(4) (e), (f), (h), (i) or (j):<br><br>22(4) A disclosure of personal information is not an unreasonable invasion of a third party's personal privacy if | | | |
| | (e) the information is about the third party's position, functions or remuneration as an officer, employee or member of a public body or as a member of a minister's staff, | | | |
| | (f) the disclosure reveals financial and other details of a contract to supply goods or services to a public body, | | | |
| | (h) the information is about expenses incurred by the third party while travelling at the expense of a public body, | | | |
| | (i) the disclosure reveals details of a licence, permit or other similar discretionary benefit granted to the third party by a public body, not including personal information supplied in support of the application for the benefit, or | | | |
| | (j) the disclosure reveals details of a discretionary benefit of a financial nature granted to the third party by a public body, not including personal information that is supplied in support of the application for the benefit or is referred to in subsection 22(3)(c). | | | |
| (1)(b) | If the individual the information is about has identified the information and consented, in the prescribed manner, to its disclosure inside or outside Canada, as applicable<br>(Note: Supporting documentation must be on file) | | | |
| (1)(c) | In accordance with an enactment of British Columbia (other than the *Freedom of Information and Protection of Privacy Act*) or Canada that authorizes or requires its disclosure | | | |
| | Specify name of enactment and relevant section(s) | | | |
| (1)(c.1) | If the personal information is made available to the public in British Columbia under an enactment, (other than the *Freedom of Information and Protection of Privacy Act*) that authorizes or requires the information to be made public | | | |
| | Specify name of enactment and relevant section(s) | | | |

| s. 33.1 | Disclosure inside OR outside Canada | Yes | No | n/a |
|---|---|---|---|---|
| (1)(d) | in accordance with a provision of a treaty, arrangement or written agreement that<br>(i) authorizes or requires its disclosure, and<br>(ii) is made under an enactment of British Columbia (other than the *Freedom of Information and Protection of Privacy Act*) or Canada | | | |
| | **Specify name of enactment and relevant section(s)** | | | |
| (1)(e) | To an individual who is a minister, an officer of the public body or an employee of the public body other than a service provider, if<br>(i) the information is necessary for the performance of the duties of the minister, officer or employee, | | | |
| | and<br>(ii) in relation to disclosure outside Canada, the outside disclosure is necessary because the individual is temporarily travelling outside Canada | | | |
| | **If paragraph (1)(e)(ii) applies, please explain how the travel is *temporary* and why disclosure outside Canada is *necessary*** | | | |
| (1)(e.1) | To an individual who is a service provider of the public body, or an employee or associate of such a service provider, if<br>(i) the information is necessary for the performance of the duties of the individual in relation to the public body, | | | |
| | and<br>(ii) in relation to disclosure outside Canada,<br>(A) the individual normally receives such disclosure only inside Canada for the purpose of performing those duties, and<br>(B) the outside disclosure is necessary because the individual is temporarily travelling outside Canada | | | |
| | **If paragraph (1)(e.1)(ii) applies, please explain how the travel is *temporary* and why disclosure outside Canada is *necessary*** | | | |

| | | | | |
|---|---|---|---|---|
| (1)(f) | To an officer or employee of the public body or to a minister, if the information is immediately necessary for the protection of the health or safety of the officer, employee, or minister | | | |
| (1)(g) | To the Attorney General or legal counsel for the public body, for the purpose of preparing or obtaining legal advice for the government or public body or for use in civil proceedings involving the government or public body | | | |
| (1)(h) | To the minister responsible for the *Coroner's Act* or a person referred to in section 36 of that Act, for the purposes of that Act | | | |
| (1)(i) | If | | | |
| | (i) the disclosure is for the purposes of collecting amounts owing to the government of British Columbia or a public body by | | | |
| | a. an individual, or | | | |

| | | | | |
|---|---|---|---|---|
| | b. corporation of which the individual the information is about is or was a director or officer, | | | |
| | and | | | |
| | (II) in relation to disclosure outside Canada, there are reasonable grounds for believing that | | | |
| | a. the individual the information is about is in, resides in or has assets in the other jurisdiction, or | | | |
| | b. if applicable, the corporation was incorporated in, is doing business in or has assets in the other jurisdiction | | | |
| 1(f.1) | For the purposes of | | | |
| | (i) a payment to be made to or by the government of British Columbia or a public body, | | | |
| | (ii) authorizing, administering, processing, verifying or cancelling such a payment, or | | | |
| | (iii) resolving an issue regarding such a payment | | | |
| (1)(j) | (j) Repealed. | | | |
| (1)(k) | For the purposes of | | | |
| | (i) licensing or registration of motor vehicles or drivers, or | | | |
| | (ii) verification of motor vehicle insurance, motor vehicle registration or drivers licences | | | |

| | | | | |
|---|---|---|---|---|
| (1)(l) | For the purposes of licensing, registration, insurance, investigation or discipline of persons regulated inside or outside Canada by governing bodies of professions and occupations | | | |
| (1)(m) | If<br>(i) the head of the public body determines that compelling circumstances exist that affect anyone's health or safety, and<br>(ii) notice of disclosure is mailed to the last known address of the individual the information is about, unless the head of the public body considers that giving this notice could harm someone's health or safety | | | |
| (1) (m.1) | For the purpose of reducing the risk that an individual will be a victim of domestic violence, if domestic violence is reasonably likely to occur | | | |
| (1)(n) | So that the next of kin or a friend of an injured, ill or deceased individual may be contacted | | | |
| (1)(o) | In accordance with section 36 (disclosure for archival or historical purposes) | | | |
| (1)(p) | The disclosure<br>(i) is necessary for | | | |
| | (A) installing, implementing, maintaining, repairing, trouble shooting or upgrading an electronic system or equipment that includes an electronic system that is used in Canada by the public body or by a service provider for the purposes of providing services to a public body, or | | | |

| | | | | |
|---|---|---|---|---|
| | (B) data recovery that is being undertaken following failure of an electronic system that is used in Canada by the public body or by a service provider for the purposes of providing services to a public body | | | |
| | and<br>(ii) In the case of disclosure outside Canada<br>(A) is limited to temporary access and storage for the minimum time necessary for that purpose, and<br>(B) in relation to data recovery under subparagraph (i)(B), is limited to access and storage only after the system failure has occurred | | | |
| | If paragraph (1)(p)(ii) applies, please explain how the temporary access and storage is for the *minimum time necessary* | | | |
| (1)(q) | If the information was collected by observation at a presentation, ceremony, performance, sports meet or similar event at which the individual voluntarily appeared and that was open to the public.<br>**Please identify event:** | | | |
| (1)(r) | If the information<br>Was disclosed on a social media site by the individual the information is about, | | | |
| | Was obtained or compiled by the public body for the purpose of enabling the public body to engage individuals in public discussion or promotion respecting proposed or existing initiatives, policies, proposals, programs or activities of the public body or respecting legislation relating to the public body,<br>and | | | |
| | is disclosed for a use that is consistent with the purpose described in subparagraph (ii). | | | |
| | Additional details as required | | | |
| (1)(s) | In accordance with section 35 (disclosure for research or statistical purposes). | | | |
| (1)(t) | To comply with a subpoena, a warrant or an order issued or made by a court, person or body in Canada with jurisdiction to compel the production of information | | | |

| | | | | |
|---|---|---|---|---|
| (2) | In addition to the authority under any other provision of this section or section 33.2, a public body that is a law enforcement agency may disclose personal information referred to in section 33 | | | |
| (2)(a) | To another law enforcement agency in Canada | | | |
| (2)(b) | To a law enforcement agency in a foreign country under an arrangement, a written agreement, a treaty or provincial or Canadian legislative authority. | | | |

| | | | | |
|---|---|---|---|---|
| (3) | The minister responsible for this Act may, by order, allow disclosure outside Canada under a provision of section 33.2 in specific cases or specified circumstances, subject to any restrictions or conditions that the minister considers advisable. | | | |
| (4) | In addition to the authority under any other provision of this section or section 33.2, the Insurance Corporation of British Columbia may disclose personal information if,<br>(a) the information was obtained or compiled by that public body for the purposes of insurance provided by the public body, and<br>(b) disclosure of the information is necessary to investigate, manage or settle a specific insurance claim. | | | |
| (5) and (6) | For the purposes of operating the designated provincial identity information services as permitted under section 33.1 (5) and (6) | | | |
| (7) | To respond to citizens' enquiries as permitted under section 33.1(7) | | | |
| | Additional details as required | | | |

| s. 33.2 | Disclosure inside Canada only | Yes | No | n/a |
|---|---|---|---|---|
| (a) | For the purpose for which it was obtained or compiled or for a use consistent with that purpose (see section 34) | | | |
| | Please provide details of the original purpose for which the personal information was obtained or compiled. Include, if applicable, details of the consistent/secondary use. | | | |
| (b) | Repealed. | | | |
| (c) | To an officer or employee of the public body or to a minister, if the information is necessary for the performance of the duties of the officer, employee or minister | | | |
| (d) | To an officer or employee of<br>(i) a public body, or<br>(ii) an agency<br>or to a minister, if the information is necessary for the delivery of a common or integrated program or activity and for the performance of the duties, respecting the common or integrated program or activity, of the officer, employee or minister to whom the information is disclosed | | | |
| (e) | To an officer or employee of a public body or to a minister, if the information is necessary for the protection of the health or safety of the officer, employee or minister | | | |
| (f) | To the auditor general or any other prescribed person or body for audit purposes | | | |
| (g) | To a member of the Legislative Assembly who has been requested by the individual the information is about to assist in resolving a problem | | | |

| s. 33.2 | Disclosure inside Canada only | Yes | No | n/a |
|---|---|---|---|---|
| (h) | To a representative of the bargaining agent, who has been authorized in writing by the employee whom the information is about, to make an inquiry | | | |
| (i) | To a public body or a law enforcement agency in Canada to assist in a specific investigation | | | |
| | (i) undertaken with a view to a law enforcement proceeding, or | | | |
| | (ii) from which a law enforcement proceeding is likely to result | | | |
| (j) | To the archives of the government of British Columbia or the archives of a public body, for archival purposes | | | |
| (k) | Repealed. | | | |
| (l) | To an officer or employee of a public body or to a minister, if the information is necessary for the purposes of planning or evaluating a program or activity of a public body | | | |
| | Additional details as required | | | |

| s. 33.3 | Disclosure to Public Without Request | Yes | No | n/a |
|---|---|---|---|---|
| (1) | Do the records fall within a category established under section 71 (1)? | | | |
| | Additional details as required | | | |
| (2) | Do the records fall within a category established under section 71.1 (1)? | | | |
| | Additional details as required | | | |

2) Systematic or Repetitious Disclosure/Exchanges?

| | | Yes | No | n/a |
|---|---|---|---|---|
| I. | Do the disclosures of personal information under section 33.2 occur on a regular basis? | | | |
| II. | Has an Information Sharing Agreement been completed for these disclosures/exchanges? | | | |
| III. | Has information related to the Information Sharing Agreement(s) been entered into the Personal Information Directory? | | | |

Personal information exchanges within a public body do not normally require an Information Sharing Agreement (ISA) if they are for a consistent purpose as defined under section 33.2(a) of the Act or are necessary for the performance of an employee of the public body under section 33.2(c). However, depending on the nature and sensitivity of the personal information exchanged, the public body might choose to prepare an ISA or similar written statement of understanding.

3) Research or Statistical Purposes (Section 35)

| | Yes | No | n/a |
|---|---|---|---|
| Has a researcher requested access to personal information in an identifiable form for research purposes? | | | |

If "yes", a research agreement that conforms to the criteria established in section 35(d) must be in place. Contact Knowledge and Information Services for assistance.

*Please note:* Research using personal information may only be conducted if it meets all of the terms of section 35.

4) Archival or Historical Purposes (Section 36)

The archives of the government of British Columbia, the archives of a public body, or a board or a francophone education authority (as defined in the *School Act*) may disclose personal information in its custody or under its control to be disclosed for archival or historical purposes as authorized by section 36.

Please check the authorization(s) for disclosure listed below.

| | | Yes | No | n/a |
|---|---|---|---|---|
| (a) | The disclosure would not be an unreasonable invasion of personal privacy under section 22 | | | |
| (b) | The disclosure is for historical research and is in accordance with section 35 (research agreements) | | | |
| (c) | The information is about someone who has been dead for 20 or more years | | | |
| (d) | The information is in a record that has been in existence for 100 or more years | | | |

***If you have not answered "yes" to any of the above authorizations for disclosure you do not have the authority to disclose personal information. If you have any questions or require clarification, please contact Knowledge and Information Services.***

VI ACCURACY AND CORRECTION OF PERSONAL INFORMATION
(Section 28 and section 29 of the FOIPP Act)

If an individual's personal information will be used by a public body to make a decision that directly affects the individual, the public body must make every reasonable effort to ensure that the information is accurate and complete. An individual must also have the ability to access, or have corrected or annotated, their personal information for a period of one year after a decision has been made based upon the personal information.

| | | Yes | No | n/a |
|---|---|---|---|---|
| 1. | Are there procedures in place to enable an individual to request/review a copy of their own personal information? | ✓ | | |
| 2. | Are there procedures in place to correct or annotate an individual's personal information if requested, including what source was used to update the file? | ✓ | | |

| | | | | | |
|---|---|---|---|---|---|
| 3. | If personal information is corrected, are there procedures in place to notify other holders of this information? | | | ✓ |
| | If yes, please provide the name of the policy and/or procedures, a contact person and phone number. | | | |
| | Policy/procedure: | ICM System Policy | | |
| | Contact person: | Diane Bessey | | |
| | Phone number: | 250 569-2374 | | |
| | Additional details as required<br>If personal information is corrected, the correction is made to the ministry's Integrated Case Management system, which indicates the correction directly on the client's electronic file so that workers whose job role requires it have access to the corrected information. | | | |

*If any of the questions above have been answered "no", please contact Knowledge and Information Services for further clarification.*

## VII SECURITY AND STORAGE FOR THE PROTECTION OF PERSONAL INFORMATION
(Sections 30 and 30.1 of the FOIPP Act)

**Note: For PIAs related to new or existing systems, this section should be completed by the Branch of the ministry responsible for systems maintenance and security, and signed off by this branch, in the Signatures section.**

**For PIAs that do not involve systems initiatives, this section should be completed by the program area completing the PIA. In this case, the signature of the systems representative is not required.**

**Section 30 of the Act requires a public body to protect personal information in its custody or under its control by making reasonable security arrangements against such risks as unauthorized access, collection, use, disclosure or disposal.**

| | | Yes | No | n/a |
|---|---|---|---|---|
| 1. | Is there reasonable technical security in place to protect against unauthorized access or disclosure? | ✓ | | |
| 2. | Is there reasonable physical security in place to protect against unauthorized access or disclosure? | ✓ | | |
| 3. | Are there branch policies and procedures in place for the security of personal information during routine collection, use and disclosure of the information? | ✓ | | |
| | If yes, please provide the name of the policy and/or procedures, a contact person and phone number. | | | |
| | Policy/procedure: | ICM System Policy | | |
| | Contact person: | Diane Bessey | | |
| | Phone number: | 250 569-2374 | | |
| | Additional details as required | | | |
| 4. | Have user access profiles been assigned on a need-to-know basis? | ✓ | | |

| | | | | |
|---|---|---|---|---|
| 5. | Do controls and procedures exist for the authority to add, change or delete personal information? | ✓ | | |
| 6. | Does your system security include an ongoing audit process that can track use of the system (e.g., when and who accessed and updated the system)? | ✓ | | |
| | **Please explain the audit process and indicate how frequently audits are undertaken and under what circumstances**<br>Audit trail built into the Integrated Case Management system retains former information, new information, and the identity of the worker making the correction. | | | |
| 7. | Does the audit identify inappropriate accesses to the system? | ✓ | | |
| | **Additional details**<br>Worker access to ICM is based on their role.<br>See STRA for additional security information. | | | |

***If any of the questions above have been answered "no", please contact your Ministry's Security Officer. If you have any questions or require clarification please contact Knowledge and Information Services.***

## VII SECURITY ARRANGEMENTS FOR THE PROTECTION OF PERSONAL INFORMATION cont'd

**Section 30.1 requires a public body to ensure that personal information in its custody or under its control is stored only in Canada and accessed only in Canada unless the individual the information is about has consented or the disclosure is otherwise allowable under the Act.**

| | | Yes | No | n/a |
|---|---|---|---|---|
| | Will the information be stored or accessed only in Canada? | ✓ | | |

**Personal information in a public body's custody or under its control must be stored and accessed only in Canada, unless one of the following applies:**

| | | Yes | No | n/a |
|---|---|---|---|---|
| (a) | Has the individual the personal information is about identified it and consented, in the prescribed manner, to it being stored in or accessed from another jurisdiction? | | ✓ | |
| | Please explain | | | |
| (b) | Will the personal information be stored in or accessed from another jurisdiction for the purpose of a disclosure that is authorized under the *Freedom of Information and Protection of Privacy Act*? | | ✓ | |
| | Please explain | | | |
| (c) | Will the personal information be disclosed under section 33.1(1)(i.1)? | | ✓ | |

| | |
|---|---|
| | Please explain |

*If you have not answered "yes" to any of the above authorizations for storage or access of personal information outside Canada or if you require clarification, please contact Knowledge and Information Services.*

VIII RETENTION OF PERSONAL INFORMATION - (Section 31 of the FOIPP Act)

If a public body uses an individual's personal information to make a decision that directly affects the individual, the public body must retain that information for at least one year after using it so that the individual has a reasonable opportunity to obtain access to it.

| | | Yes | No | n/a |
|---|---|---|---|---|
| 1. | Do you have an approved records retention and disposition schedule? | ✓ | | |
| 2. | Is there a records retention schedule to ensure information used to make a decision that directly affects an individual is retained for at least one year after use? | ✓ | | |

*If you answered "no" to the above questions, your procedures may need to be revised. Please contact your Records Officer.*

Note: Records of provincial public bodies and designated organizations/public bodies cannot be destroyed unless approval is granted under the authority of the *Document Disposal Act*. Please consult with your Records Officer to initiate the records scheduling process.

Comments:

X SIGNATURES

PUBLIC BODY APPROVAL:

| | | |
|---|---|---|
| Judy D'Gai, Director<br>Regional Operations Branch<br>Ministry of Social Development | Signature | February 4/13<br>Date |
| Ministry Contact Responsible for Systems Maintenance and Security | Signature | Date |
| J. VanDenBulk<br>Knowledge and Information Services<br>Office of the Chief Information Officer<br>Ministry of Labour, Citizens Services, and Open Government | Signature | Feb. 6/13<br>Date |
| Sharon Moysey, Assistant Deputy Minister<br>Regional Services Division<br>Ministry of Social Development | Signature | FEB 12 2013<br>Date |

GO TO: PERSONAL INFORMATION DIRECTORY (to add PIA and/or ISA summary)

## Ministry of Social Development

## Channel Strategy Client Focus Groups

### Project Plan Timetable

*Note: Steering Committee meetings are shaded.

| Phase | Step and description | Details | Dates and Locations |
|---|---|---|---|
| 1: Preparation | 1 – Steering Committee Meeting | Meet with Steering Committee to confirm the goals, deliverables and scope of the project, as well as timelines, focus group participants, locations and resourcing requirements. | Jan. 22, 2013 9.30am to 11.00am |
| | 2 – Finalize Plan, Agenda, Templates | Final draft of Project Charter | The week of Jan. 22, 2013 |
| | 3 – Meet with Steering Committee #2 | Present Project Charter to Steering Committee and finalize/approve | The week of Jan. 30, 2013 (1-1½ hour AM) |
| 2: Deliver Focus Groups | 4 – Deliver Focus Group 1 | Deliver Region 2: Vancouver Client Focus Group | Feb. 13th 10.00am to 2.00pm Vancouver |
| | 5 – Deliver Focus Group 2 | Deliver Region 3: Fraser Focus Group | Feb. 14th 10.00am to 2.00pm Surrey |
| | 6 – Steering Committee # 3 | Meet with Steering Committee to review progress and make any course corrections necessary. | Feb. 18, 2013 (1 hour PM) |
| | 7 – Deliver Focus Group 3 | Deliver Region 4: Interior Focus Group | February 26, 2013 10.00am to 2.00pm Kelowna |
| | 8 – Deliver Focus Group 4 | Deliver Region 5: North Focus Group | February 28, 2013 10.00am to 2.00pm Prince George |
| | 9 – Steering Committee Meeting | Meet with Steering Committee to review progress and make any course corrections necessary. | March 4, 2013 (1 hour PM) |
| | 9 – Deliver Focus Group 5 | Deliver Region 1: Vancouver Island Focus Group | March 12, 2013 10.00am to 2.00pm Nanaimo |
| 3: Prepare and Deliver Report | 10 – Prepare Draft 1 report | Prepare Draft 1 report and submit to Steering Committee. | Week of March 12 |
| | 11 – Meet with Steering Committee | Meet with Steering Committee to obtain feedback on report. | March 25, 2013 (1 hour PM) |
| | 12 – Complete Draft 2 report | Finalize report based on Steering Committee feedback and submit. | By end March 29 |

*Final times and dates are subject to availability of appropriate venue



berlin eaton

BRITISH COLUMBIA

February 5, 2013

***Name***
***Address Line 1***
***Address Line 2***
***City BC Postal Code***

Dear ***Name***:

Thank you for agreeing to participate in the [**Surrey**] focus group to provide feedback on the ministry's service delivery channels. The ministry is always looking for ways to deliver better, more efficient service.

Participation is completely voluntary. Whether you choose to participate or not will not affect your eligibility for assistance in any way. If you do participate, your feedback will be kept strictly confidential.

As you requested, here is the session information. The session will be held at:

***[Location]***
***[Day, Date]*** at ***[Time]***

Please be sure you are there by ***[15 minutes prior to start time]*** so the facilitators can start the session promptly at ***[start time]***. The session will take about half a day, so lunch will be provided.

Enclosed is a bus ticket for your transportation to the session. A return bus ticket will be available at the session.

If you have any questions about the session, or if you are unable to attend, please call ***[Name]*** at ***[Direct Number]*** to let us know.

Thank you very much for helping us to improve our services. We look forward to your feedback, and hope you enjoy the session.

***[Local contact]***

Ministry of Social Development
[Office Name here]
Mailing Address: [address here]
Telephone: ### ###-####
Facsimile: ### ###-####

BRITISH COLUMBIA

Ministry of Social Development

# Project Charter

## Channel Strategy
## Client Focus Groups

| | |
|---|---|
| **Authors:** | Darcy Houston & Terri Archer |
| **Creation Date:** | 7 January 2013 |
| **Last Updated:** | 5 February 2013 |
| **Version Number:** | 1.3 |
| **Document ID:** | Regional Operations' file location:<br>file://J:\Implementation & Stakeholder Relations\PISRL\PROJECTS - PISRL\Channel Strategy\Client Engagement\Client Focus Groups |

# PROJECT CHARTER

| | |
|---|---|
| **Project Name:** | **Channel Strategy: Client Focus Groups** |
| **Expected Completion Date:** | **March 31, 2013** |
| **Executive Sponsor and Project Champion:** | **Janice Nakamura** |
| **Project Director:** | **Judy D'Gal** |
| **Project Manager:** | **Terri Archer** |

**Background:**

In May 2012, Regional Operations prepared a Stakeholder Engagement Plan as part of the Channel Strategy to enhance service delivery.

One component of the plan is to consult with BCEA clients on the ministry's service delivery channels, including the proposed online client portal.

Focus groups will be conducted in early 2013, to inform development of the online portal prototype and the enhancement of our other service channels.

Regional Operations has contracted focus group facilitation to Berlin Eaton, based on their proposal of 20 December 2012.

**Business Needs / Purpose:**

The business need / purpose of the client focus groups is to:

- Ensure development of the online self serve portal is informed by client input
- Identify opportunities for improvement to existing service delivery channels, including quick wins
- Enhance ongoing dialogue processes with clients and set the foundation for feedback loops

**Project Goal:**

Initiate a primary consultation process to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel.

**Project objectives:**

The objectives of the client focus groups are to:

- Introduce the online portal vision to clients
- Obtain feedback on the online portal prototype
- Understand the preferences, needs and decision-making criteria for clients in choosing a service channel
- Clarify opportunities for self serve channel, and barriers to access
- Identify support(s) required for self-serve channel
- Analyze and determine service delivery processes that are best suited, both for efficiency and effectiveness, to each type of channel
- Gain an understanding of what our clients' needs are for service channels

**Scope:**

***In scope:***

- Preparation for focus group sessions, including developing a Steering Committee and a final Project Charter
- Delivery of five focus group sessions, one in each region with completion of all sessions by mid-March 2013
- Preparation and delivery of final report by March 31, 2013

***Out of scope:***

- Staff focus group sessions
- Development of the online portal prototype
- Roll-out of "quick wins" based on early focus group results

## Project Plan Timetable:

### Channel Strategy Client Focus Groups

*Note: Steering Committee meetings are shaded.

| Phase | Step and description | Details | Dates and Locations |
|---|---|---|---|
| 1: Preparation | 1 – Steering Committee Meeting | Meet with Steering Committee to confirm the goals, deliverables and scope of the project, as well as timelines, focus group participants, locations and resourcing requirements. | Jan. 22, 2013 |
| | 2 – Finalize Plan, Agenda, Templates | Final draft of Project Charter | The week of Jan. 22, 2013 |
| | 3 – Meet with Steering Committee #2 | Present Project Charter to Steering Committee and finalize/approve | The week of Jan. 30, 2013 (1-1 ½ hour AM) |
| 2: Deliver Focus Groups | 4—Deliver Focus Group 1 | Deliver Region 2: Vancouver Client Focus Group | Feb. 13th Vancouver |
| | 5—Deliver Focus Group 2 | Deliver Region 3: Fraser Focus Group | Feb. 14th Surrey |
| | 6 – Steering Committee # 3 | Meet with Steering Committee to review progress and make any course corrections necessary | Feb. 18, 2013 (1 hour PM) |
| | 7—Deliver Focus Group 3 | Deliver Region 4: Interior Focus Group | February 26, 2013 Kelowna |
| | 8—Deliver Focus Group 4 | Deliver Region 5: North Focus Group | February 28, 2013 Prince George |
| | 9 – Steering Committee Meeting | Meet with Steering Committee to review progress and make any course corrections necessary | March 4, 2013 (1 hour PM) |
| | 9—Deliver Focus Group 5 | Deliver Region 1: Vancouver Island Focus Group | March 12, 2013 Nanaimo |
| 3: Prepare and Deliver Report | 10– Prepare Draft 1 report | Prepare Draft 1 report and submit to Steering Committee. | Week of March 12 |
| | 11 – Meet with Steering Committee | Meet with Steering Committee to obtain feedback on report | March 25, 2013 (1 hour PM) |
| | 12 – Complete Draft 2 report | Finalize report based on Steering Committee feedback and submit. | By end of March |

*Final times and dates are subject to availability of appropriate venue

**Timeline for MSD Project Documents:**

| Timeline | Deliverable | Lead |
|---|---|---|
| Jan 14-18 | Draft Information Note, PIA, STRA & start Project Charter | Terri / Darcy |
| Jan 21-25 | Finalize IN, PIA & STRA | Terri / Darcy |
| | Finalize contract with Berlin Eaton | Terri / Pardip & Business Supports |
| Jan 28 - Feb 1 | Approvals for IN, PIA & STRA | Terri / Darcy |
| | Secure venues, finalize details, finalize phone/invitation script & identify participants for Regions 2 & 3 focus group sessions | Regional leads and Regional Operations |
| Feb 4-8 | Contact focus group participants for Regions 2 & 3 | CRSQs or regional delegate |
| | Secure venues, finalize details & identify participants for Regions 4 & 5 focus group sessions | Regional leads and Regional Operations |
| Feb 12-15 | Contact focus group participants for Regions 4 & 5 | CRSQs or regional delegate |
| | Secure venues, finalize details & identify participants for Region 1 focus group sessions | Regional leads and Regional Operations |
| Mar 4-8 | Contact focus group participants for Region 1 | CRSQs or regional delegate |

**Steering Committee:**

| | |
|---|---|
| **Regional Operations:** | |
| **Janice Nakamura** | Executive Sponsor |
| **Judy D'Gal** | Project Director |
| **Jennifer Anholt** | Channel Strategy Manager |
| **Terri Archer** | Project Management Lead |
| **Darcy Houston** | Project Officer |
| **Pardip Bandechha** | Project Analyst |
| **Colleen Turner** | Information Management Branch lead *(Client Portal)* |
| **Berlin Eaton - contracted facilitation agency:** | |
| **Richard Eaton** | Facilitator |
| **Norma Glendinning** | Facilitator |
| **MSD Regional Reps (Community Relations Service Quality Managers - CRSQs):** | |
| **Jeannine Bousquet & Janis Ruel** | Region 1 |
| **Jean Lofthouse** | Region 2 |
| **Trent Brown** | Region 3 |
| **Harleen Price** | Region 4 |
| **Ian Harrower** | Region 5 |

**Committee Purpose:**

- To gain a common understanding of the project's scope, deliverables, timeline and responsibilities – (as documented in this detailed Project Charter)
- Assess learning from initial focus group(s) and make adjustments as needed
- To keep focus group sessions on track to meet project goals

**Stakeholders to be engaged during the Project:**

The stakeholder groups to be engaged during the project are:

- Clients – representing a broad cross section of clients, with consideration to the greatest proportion of client caseload who continually access services
- IMB - portal development team
- Ministry Directors of Service Delivery (DSDs)
- Service and Organizational Excellence Committee (SOEC)
- Research Branch (Rob Bruce – identify client samples)
- Regional leads (CRSQs or delegates)
- Ministry of Citizens' Services and Open Government – David Hume
  - BC Stats: Public Sector Research & Evaluation– Martin Monkman & Beth Collins

Other stakeholder information considered is the feedback from advocates (from focus group sessions, etc).

**Goals for the Project Team:**

The goals for the project team are to:

- Ensure all focus groups and final reporting are complete by March 31, 2013
- Ensure meaningful feedback is provided to client portal development team
- Ensure meaningful feedback is provided to others, including service delivery channel leads

**Deliverables:**

Major deliverables are:

- Focus groups – one in each of the five regions
- Standardized focus group session agenda **(see Appendix A)**, phone script, target questions and key messages
- Two Notes: Decision Note on funding, Info Note on focus group plan and participant selection
- Privacy Impact Assessment (PIA)
- Security Threat Risk Assessment (STRA)
- Communications Plan
- Final report on focus group sessions

**Project Governance and Roles, Responsibilities and Resources:**

- **Berlin Eaton**
  - Work with Steering Committee to prepare and finalize agenda, materials, etc. to course correct as required, and to finalize report
  - Work with regional leads to finalize venues, participant selection, etc. to ensure successful focus groups
  - Facilitate all focus groups and update Steering Committee on findings
- **Regional Operations** – Janice Nakamura – approve project
  - Judy D'Gal – project oversight for entire Stakeholder Engagement Plan and communications plan
  - Terri Archer – project manager – guide project phases through approvals; provincial rep for focus group sessions
  - Darcy Houston – project analyst/support – draft PIA, STRA, Project Charter and work plan
  - Pardip Bandechha – communications planning, contractor liaison, facilities / venue liaison, oversee catering
  - Jennifer Anholt – assist with formal communications plan and messaging
- **Regional leads (CRSQs)**
  - Identify and secure local venue options
  - Finalize participant selection/invitation
  - Local liaison for catering
  - Regional rep to introduce session to participants (or provide delegate)
- **GCPE** – Susan Mader – review and approve external communications

**Approval:**

I have reviewed this Project Charter and I approve it.

| Name: | Title: | Signature: | Date: |
|---|---|---|---|
| Janice Nakamura | Executive Director<br>Regional Operations | | |
| Judy D'Gal | Director<br>Regional Operations | | |
| Susan Mader | Communications Director<br>GCPE | | |
| Rob Bruce | Executive Director<br>Research Branch | | |
| Richard Eaton | Berlin Eaton | | |
| Norma Glendinning | Berlin Eaton | | |

**Service Channel Strategy - Client Focus Group Sessions**

***DRAFT* Agenda**

| Time | Agenda Item | Lead |
|---|---|---|
| 10:00am | Welcome and introductions | MSD Staff |
| 10:15am | Opening activities | Berlin Eaton |
| 10:30am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement | Berlin Eaton |
| 11:30am | Review online modules and obtain feedback | Berlin Eaton |
| 12:00pm | *Lunch* | All |
| 12:15pm | Review online modules (continue while people eat) | Berlin Eaton |
| 1:00pm | Design the future:<br>• Map redesigned of service channel processes<br>• Identify recommendations to MSD | Berlin Eaton |
| 2:15pm | Summary of actions and next steps | Berlin Eaton |
| by 2:30pm | Session Ends – Thank you | All |

**NOTE:** Agenda may be refined further after initial focus group, as needed.

**Rationale for Ministry Staff to Facilitate Channel Strategy - Client Consultation (Focus Group – Region 2):**

Conducting client focus groups is one deliverable of the approved Stakeholder Engagement Plan, developed by Regional Operations Branch as part of the Channel Strategy to enhance service delivery.

The specific objectives of the client focus groups are to:

- Introduce the online portal vision to clients;
- Obtain timely client feedback on the online portal prototype (self-serve channel), including feedback about potential barriers to be addressed and supports required to enhance client uptake for this new service channel;
- Assess client preferences, needs and decision-making criteria when choosing a service channel; and,
- Enhance our understanding of our clients' needs for service channels, including determining effectiveness of current channels and potential opportunities for service delivery improvements

Regional Operations secured ministry approval to contract Berlin Eaton, through the Corporate Supply Arrangement, to facilitate these client focus group consultation sessions timely and to provide an arms-length perspective in support of open, unbiased feedback from participants (Cliff #177990).

In addition to the 6 client sessions (by end of fiscal) that are being facilitated by Berlin Eaton within their contract, Regional Operations is proposing to host an additional session in Region 2 which would be facilitated by one internal ministry staff (Terri Archer, Manager Stakeholder Relations) with regional support from the CRSQ. The ministry has developed capacity to facilitate this session through involvement/co-facilitation with the focus groups to date. Hosting the additional internal facilitated session would allow the ministry to evaluate our success with an internal facilitator for client sessions versus use of external contracted facilitation services. This would also help inform the ministry in future focus group planning.

**Hosting additional client consultation in Region 2 by internal staff offers the following benefits:**

- Allows the ministry to collect additional feedback from clients in Region 2 (as initial consultation had low turn-out).
- Allows the ministry to compare client consultation feedback through contracted facilitators vs. internal facilitators.

**Proposed Budget:**

| | | |
|---|---|---|
| Venue Rental | s.13 | |
| Food | | |
| **Travel Cost** *(total for 1)* | | |
| Car Rental | | *(unless government car available)* |
| Ferry | | |
| Hotel | | |
| Meal Per Diem | | |
| **Total Cost Estimate** | **$1,261.00** | |

# FOCUS GROUP PARTICIPANT RECRUITMENT

**IMPORTANT – Prior to contacting clients:**

**Please note: We MUST be mindful that we are contacting these clients outside of ministry eligibility and we have a responsibility to protect their privacy. Do NOT leave a message or identify to anyone else who answers that there is involvement with the ministry.**

- **Please ensure you have all the following details prior to making the calls:**
  - **Time, date and location of the focus group in your region**
  - **Relevant details about the venue – e.g., what are the cross streets? What transit route is it on? and**
  - **Name and direct contact number of the ministry rep in case of follow-up questions**

  *(You may want to type this information directly into the scripts below)*

- **Look up each client in ICM:**
  - **Exclude any clients for whom participation is clearly inappropriate (e.g., third party administration, end stage of terminal illness, etc.) – clients with alerts should already be excluded from the list.**
  - **Check for any communication needs that will affect call, e.g., need for an interpreter, or for TDD service for hard of hearing clients.**

- **If client cannot attend the group, but is still very interested in giving their feedback:**
  - **Ask if the client would like you to pass on their name and contact number to the project lead, Terri Archer, for follow-up.**
  - **If yes, ask for a good time (a window, i.e. between 9-11am, morning, afternoon, even evening) to call them back, then send the information to (Terri.Archer@gov.bc.ca)**

- **If respondents have questions, comments or requests for service *not* related to the focus group:**
  - **Refer them to the 1-866 number, e.g. "I'm sorry, but I'm not able to process requests for service. This call is strictly for research purposes. You can call our general line at 1-866-866-0800, and a ministry worker will be happy to help you."**

**Script for invitation to participate:**

Hello, may I please speak to _____ [*client name*]?

Hi, my name is _____ and I am calling from the Ministry of Social Development. The Ministry is always looking for ways to deliver better, more efficient service. ~~Understanding the needs of our clients helps us to deliver programs and supports that best address these needs.~~

We are studying how clients access our services, and we are looking for some clients who can provide us feedback on our service delivery options by participating in a focus group session on [Date]. The group will take about half a day, so lunch will be provided.

# FOCUS GROUP PARTICIPANT RECRUITMENT

Participation is completely voluntary. Whether you choose to participate or not will *not* affect your eligibility for assistance in any way. If you do participate, your feedback will be kept strictly confidential. The opinions you provide will be combined with feedback from other clients so that no individual client can be identified.

Would you be interested in participating in the focus group?

[IF NO] Okay, thank you very much for your time. [END CALL]

[IF YES] That's great, thank you. Let me give you a few more details. The focus group will be held:

> [*Location details*]
>
> Do you know where that is? [*Give details, e.g., cross streets, bus route, etc.*]
>
> [*Date* and *Time*]
>
> Please be sure you are there by [*15 minutes prior to start time*] so the facilitators can start the session promptly at [*start time*].

[IF CLIENT CANNOT ATTEND DATE/TIME] Okay, thank you very much for your time. [END CALL]

Lunch will be provided. Do you have any special needs we should be aware of, such as allergies or diet restrictions?

The focus group will be led by a non-ministry facilitator. The ministry is looking for open and honest feedback about where our service delivery works well, and where it could be improved.

The ~~focus~~ group will look at how the ministry delivers services now, as well as how we might deliver services in the future. ~~We will be looking for your ideas for how we can improve our service delivery.~~

In addition to providing lunch, the ministry will be covering bus tickets for clients who participate. ~~Will you need a bus ticket, or do you already have a bus pass?~~ Bus tickets will be available at the session.

If you'd like, we are happy to give you a reminder call the day before the session. If you have any questions about the session, or if you are unable to attend, please call [Name] at [Direct Number] to let us know.

Thank you very much for helping us to improve our services. We look forward to your feedback. I hope you enjoy the session. [END CALL]

**Script for Reminder Calls:** [*Reminder calls to be made to confirmed attendees, the day before the focus group*]

Hello, may I please speak to _____ [*client name*]?

Hi, my name is _____ and I am calling from the Ministry of Social Development. I'm just calling to remind you about the focus group tomorrow at [*Location*] at [*Time*], and to remind you that lunch will be provided.

Thank you very much for helping us to improve our services. We appreciate your time to provide us feedback. [END CALL]

## Ministry of Social Development Channel Strategy
## Region 4 Client Focus Group

**Date and Timing:** 10:00am to 2:30pm, Tuesday, February 26, 2013

**Purpose:** To obtain feedback on existing service channels as well as a new on-line portal.

**Location:** John Howard Society, *Multi Purpose Room*, 1440 St. Paul Street, Kelowna

**Proximity to bus route:** Directly on bus route

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10.00am | Welcome and introductions<br>• Welcome on arrival<br>• Hand out name tags and record names. Note: Match names with certificates of appreciation<br>• Opening remarks: explain what this meeting is about and how it connects with the overall ministry project<br>• Introduce each other: What's your name and where are you from?<br>• Emphasize voluntary participation, confidentiality of the information captured, and the need to put everything on flipcharts and<br>• Are there any other questions before we begin? | Berlin Eaton |
| 10.30 am | Introduce Ministry's Channel Strategy<br>• PowerPoint presentation, questions afterwards | Terri Archer |
| 10.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement for:<br>• Phone<br>• Email<br>• Walk In/ Face to Face<br>• Online e.g., Self-Serve Assessment and Aapplication ~~forms~~<br>• Fax<br>• Other<br>Write these channel titles on top of a section of continuous flipchart map – each over a T-chart with 'Works Well' on one side and 'Needs Improvement' on the other. Leave a space at top and bottom of each for 'voting' with sticklers by participants. Walk the group through each channel and record what they find more or less valuable about each. At the end, hand out stickies and invite them to put a number out of 10 (highest score) that relates to how valuable they find each of these channels. Post sticky notes at the top of each space provided.<br>(See end of the agenda for a visual of this approach.) | Berlin Eaton |

| Time | Agenda Item | Lead |
|---|---|---|
| 11.30am | Presentation on online modules and obtain feedback<br><br>Terri will deliver the full presentation and explain each module. We will then ask the audience what they find ~~'more~~ most valuable' and what they find '~~less~~ least valuable' about this online product and record their answers, in the context of *their* use specifically. We will also record the questions that clients ask during this activity to get a sense of what they find most interesting or perplexing. | Terri Archer |
| 12.00pm | Lunch | |
| 12.15pm | Online modules cont'd | Terri and Berlin Eaton |
| 1.00pm | Designing the Future<br><br>Having had an opportunity to share their levels of satisfaction with current service channels, we will then ask clients (now that they have seen the presentation of the online portal) which service channels they would prefer to use (see themselves using) in the future and for what purpose. Using stickies, we will refer back to the large wall chart used in the morning and ask them to vote using a score out of 10 again, for the channel they would prefer to use. The stickies will be placed at the space reserved on the bottom of each channel.<br><br>Having done that, we will add up the scores and, for the service channel they would prefer to use in the future, confirm why they liked it and what we should pay attention to (specific to service delivery) in order to make it work well with this client group. | Berlin Eaton |
| 2.15pm | Summary of actions and next steps, hand out session survey, and invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Berlin Eaton |
| By 2.30pm | Closing remarks and adjourn | Terri Archer |

| (Space to put scores for current satisfaction...) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
| Phone | | Face to Face | | Email | | Online | | Fax | |
| Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: |
| (Space to put scores for what they will prefer to use in the future...) | | | | | | | | | |
| | | | | | | | | | |



berlin eaton

## Ministry of Social Development Channel Strategy
## Region 5 Client Focus Group

**Date and Timing:** 10:00am to 2:30pm - Thursday, February 28, 2013

**Purpose:** To obtain feedback on existing service channels as well as a new on-line portal.

**Location:** Prince George Native Friendship Centre, *Circle of Unity Room,* 1600 - 3rd Avenue

**Proximity to bus route:** Right on bus route with bus stop right in front. Venue is well known and central)

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10.00am | Welcome and Introductions<br>• Welcome on arrival<br>• Hand out name tags and record names. Note: Match names with certificates of appreciation<br>• Opening remarks: explain what this meeting is about and how it connects with the overall ministry project<br>• Introduce each other: What's your name and where are you from?<br>• Emphasize voluntary participation, confidentiality of the information captured, and the need to put everything on flipcharts<br>• Are there any other questions before we begin? | Berlin Eaton |
| 10.30 am | Introduce Ministry's Channel Strategy<br>• PowerPoint presentation, questions afterward | Terri Archer |
| 10.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement for:<br>• Phone<br>• Email<br>• Walk In/ Face to Face<br>• Online e.g., Self-Serve Assessment and Aapplication ~~forms~~<br>• Fax<br>• Other<br>Write these channel titles on top of a section of continuous flipchart map – each over a T-chart with 'Works Well' on one side and 'Needs Improvement' on the other. Leave a space at top and bottom of each for 'voting' with sticklers by participants. Walk the group through each channel and record what they find more or less valuable about each. At the end, hand out stickies and invite them to put a number out of 10 (highest score) that relates to how valuable they find each of these channels. Post sticky notes at the top of each space provided.<br>(See end of the agenda for a visual of this approach.) | Berlin Eaton |



berlin eaton

| Time | Agenda Item | Lead |
|---|---|---|
| 11.30am | Presentation on online modules and obtain feedback<br><br>Terri will deliver the full presentation and explain each module. We will then ask the audience what they find '~~more~~ most valuable' and what they find '~~less~~ least valuable' about this online product and record their answers, in the context of *their* use specifically. We will also record the questions that clients ask during this activity to get a sense of what they find most interesting or perplexing. | Terri Archer |
| 12.00pm | Lunch | |
| 12.15pm | Online modules cont'd | Terri and Berlin Eaton |
| 1.00pm | Designing the Future<br><br>Having had an opportunity to share their levels of satisfaction with current service channels, we will then ask clients (now that they have seen the presentation of the online portal) which service channels they would prefer to use (see themselves using) in the future and for what purpose. Using stickies, we will refer back to the large wall chart used in the morning and ask them to vote using a score out of 10 again, for the channel they would prefer to use. The stickies will be placed at the space reserved on the bottom of each channel.<br><br>Having done that, we will add up the scores and, for the service channel they would prefer to use in the future, confirm why they liked it and what we should pay attention to (specific to service delivery) in order to make it work well with this client group. | Berlin Eaton |
| 2.15pm | Summary of actions and next steps, hand out session survey, and invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Berlin Eaton |
| By 2.30pm | Closing remarks and adjourn | Terri Archer |

| (Space to put scores for current satisfaction...) | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | |
| Phone | | Face to Face | | Email | | Online | | Fax | |
| Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: | Works Well: | Needs Improve-ment: |
| (Space to put scores for what they will prefer to use in the future...) | | | | | | | | | |
| | | | | | | | | | |



berlin eaton

## Channel Strategy - Client Focus Groups Project

### Steering Committee Meeting

January 22, 2013

**Purpose:** The purpose of this meeting is to form our Steering Committee for this project, confirm the project charter and prepare for the client focus groups.

**Location:** MSD R 8th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 9:30am | Introductions, and restate the purpose of this project | Janice and Terri |
| 9:45am | Review the project charter: goals, objectives, scope, dates, locations, key messages, and roles and responsibilities | Facilitated |
| 10:10am | Review the draft agenda for the focus groups | Facilitated |
| 10:20am | Finalize administrative requirements | Facilitated |
| 10:40am | Summarize actions and next steps | Facilitated |
| by 11:00am | Adjourn | All |

**Key deliverables from this meeting:**

- Clear roles, responsibilities and timelines
- Identify dates and CRSQs securing of venues
- Client Focus Group session agenda
- Next Steps (documents for approval and preparations, etc.)



berlin eaton

## Channel Strategy - Client Focus Groups Project
### Steering Committee Meeting
**January 30, 2013**

**Purpose:** To check on progress to date with respect to logistics and finalize the focus group agenda and target questions.

**Location:** MSD R 6th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Members:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 11:00am | Debrief last meeting and confirm meeting expectations and agenda | Facilitated |
| 11:15am | Review progress on Summary of Actions and Next Steps from last meeting, including logistics and dates | Facilitated |
| 11:40am | Confirm target questions for the focus groups | Facilitated |
| 11:55pm | Confirm agenda for the focus groups | Facilitated |
| 12:05pm | Summarize actions and next steps | Facilitated |
| by 12:15pm | Adjourn | All |

## Channel Strategy - Client Focus Groups Project
## Steering Committee Meeting
**January 30, 2013**

**Purpose:** To check on progress to date with respect to logistics and finalize the focus group agenda and target questions.

**Location:** MSD R 6th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Members:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 11:00am | Debrief last meeting and confirm meeting expectations and agenda | Facilitated |
| 11:15am | Review progress on Summary of Actions and Next Steps from last meeting, including logistics and dates | Facilitated |
| 11:40am | Confirm target questions for the focus groups | Facilitated |
| 11:55pm | Confirm agenda for the focus groups | Facilitated |
| 12:05pm | Summarize actions and next steps | Facilitated |
| by 12:15pm | Adjourn | All |

## Channel Strategy - Client Focus Groups Project
### Steering Committee Meeting
**January 30, 2013**

**Purpose:** To check on progress to date with respect to logistics and finalize the focus group agenda and target questions.

**Location:** MSD R 6th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet and Janis
    2. Jean Lofthouse
    3. Trent Brown and Denise Cedar
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 11:00am | Debrief last meeting and confirm meeting expectations and agenda | Facilitated |
| 11.15am | Review progress on Summary of Actions and Next Steps from last meeting, including logistics and dates | Facilitated |
| 11.45am | Confirm target questions for the focus groups [and discuss script for invitation to clients] | Facilitated |
| 12.00pm | Confirm agenda for the focus groups | Facilitated |
| 12.15pm | Summarize actions and next steps | Facilitated |
| by 12.30pm | Adjourn | All |

## Debrief last meeting

- Kickoff meeting went fine/well.
- Just waiting for client list so can get going on contacting people.

## Preparation for Focus Groups

- Client List:
  - Working with Research Branch - should have the lists back for Regions 2&3 by end of day on Friday, Feb. 1st.
  - Using postal codes for proximity to venue. Won't have to worry about alerts (e.g., health and safety, etc.). There are about 8 alerts, and they will NOT be included in the list.
  - What about the clients that don't have a phone? We will stick with the list for Regions 2 and 3. Then assess after the first two sessions to reconsider engaging advocacy groups to ensure broader representation of the caseload.
- Script:
  - Draft in progress for invitation to clients.
  - Need direct ministry contact # in script. (e.g. Darlene Walker offered direct line for Region 2).
  - When calling client, if there are other issues raised by client, refer client to contact ministry separate from the invitation call.
  - Intended to have draft sent out to regional contacts by Wed. afternoon with comments back by end of day Thursday. ***Delayed***, send out late Thursday for feedback by mid-day Friday for those who can meet this timeline and will reassess as needed.
  - Participant list (password protected) and script will be sent out Friday (with separate contact for password info). Script to accompany Participant List.
- Child care: Not in scope for reimbursement of expenses. Will need to request client to manage/arrange.
- Transportation reimbursement will be limited to bus tickets. Pardip will follow-up with each CRSQ to determine best approach for purchase. Option available to reclaim expense through project budget.
- Regional travel for sessions deemed not an issue. Regions will manage (e.g. through business vehicle)

### Region Focus Groups

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 1. Vancouver Island | March 12th<br>10:00am to 2:30pm | City of Nanaimo<br>*Bowen Clubhouse*<br><br>500 Bowen Rd<br>Nanaimo BC V9R 1Z7 | Jeanine or Janis | Jeanine<br>250-739-6600 |
| 2. Vancouver Coastal | Feb. 13, 2013<br>10:30am to 3:00pm | Vancouver Library<br>*Morris J. Wosk Boardroom*<br><br>350 West Georgia St<br>Vancouver BC V6B 6B2 | Darlene Walker's direct line | Jean Lofthouse |



berlin eaton

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 3. Fraser | Feb. 14, 2013<br>10:00am to 2:30pm | Surrey Kwantlen Campus<br>*Cedar Room 2105*<br><br>12666 72nd Avenue<br>Surrey BC V3W 2M8 | Denise Sedar and Trent Brown | Denise |
| 4. Interior | Feb. 26th 2013<br>10:00am to 2:30pm | John Howard Society<br>*Multi Purpose Room*<br><br>1440 St. Paul Street<br>Kelowna BC V1Y 2E6 | Harleen Price | Harleen |
| 5. North | Feb. 28th 2013<br>10:00am to 2:30pm | Prince George Native Friendship Centre<br>*Circle of Unity Room*<br><br>1600 - 3rd Avenue<br>Prince George, BC V2L 3G6 | Ian Harrower | Ian |

*Note: Room should be booked for 1 hour before and after the session so that Richard and Norma can set up, clean up and debrief with Terri and CRSQ.

**Contact Info for Richard and Norma:**

- Richard's Cell: 250-889-1292
- Berlin Eaton Office: 250-472-3767
- Richard's Email: reaton@berlineaton.com
- Norma's email: nglendinning@berlineaton.com
- Berlin Eaton Website: www.berlineaton.com
- http://www.linkedin.com/profile/view?id=16398225&trk=hb_tab_pro_top
- http://www.linkedin.com/profile/view?id=65209796&locale=en_US&trk=tyah

**Key Target Questions**

Focus:

We want people to tell us about how they access service, why they choose a particular "service delivery channel", how that channel could be improved, how comfortable they are with using other options, and what would be needed to make newer service delivery channels as efficient and effective as possible.

- How do you prefer to access services and why?
- What challenges, if any, have you had with each service channel?
- What encourages you to get services thru a specific channel?
- Do you access our services electronically now? What would it make things easier for you?
  - Is 24/7 access important to you?
- Do you use community agencies' services to assist in accessing our services?
- How can we improve upon our service channels?

**Focus Group Agenda**

- Richard provided an overview of the proposed standard agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10:00am | Welcome and introductions | MSD Staff |
| 10:15am | Opening activities | Berlin Eaton |
| 10:30am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement | Berlin Eaton |
| 11:30am | Review online modules and obtain feedback | Berlin Eaton |
| 12:00pm | *Lunch* | All |
| 12:15pm | Review online modules (continue while people eat) | Berlin Eaton |
| 1:00pm | Design the future:<br>▪ Map redesigned of service channel processes<br>▪ Identify recommendations to MSD | Berlin Eaton |
| 2:15pm | Summary of actions and next steps | Berlin Eaton |
| by 2:30pm | Session Ends – Thank you | All |

- Online Portal Demo(s)/videos: *under development – requires IMB to record*
  - 5 or 6 clips with feedback? Is there enough time?
  - We will need to do a rehearsal of some kind before the first session to figure that out
- On arrival: we will have coffee and snacks available for participants. Note possible allergy issues with attendees.

## Summary of Actions and Next Steps

| # | Actions | Who | By When | Status |
|---|---|---|---|---|
| 1 | Follow-up with Ian to determine location for Region 5 | Terri | Done *(Prince George)* | Done *(Prince George)* |
| 2 | Finalize schedule and budget | Berlin Eaton and Terri | Jan. 25th | Near completion Need confirmation from Kelowna |
| 3 | Finalize focus group agenda | Berlin Eaton and Terri | Jan. 25th | Need to complete "plain language version" |
| 4 | Work with Rob Bruce to develop a list of focus group participants. *Note: keep alerts out & consider proximity/travel to venue | Terri Archer | Feb. 1 | Expect to be done by Feb. 1 |
| 5 | Select and book venues and catering | Pardip and CRSQs | Feb. 1 | Expect to be finalized by Feb. 6 |
| 6 | Create phone script for regional callers | Terri and Darcy | Feb. 1 | Draft will be sent out to regional contacts by end of day Thursday, Jan. 31 |
| 7 | Determine approach to client out of pocket expenses | Pardip and CRSQs | Feb. 1 | Expect to finalize by Feb. 6 |
| 8 | Finalize phone lists for all regions (will be password protected) | Terri/Darcy, Jean and Trent | Feb. 1 | In progress |
| 9 | Determine the extent of Colleen's and Terri's participation in focus groups | Terri and Colleen | Feb. 8 | In progress |
| 10 | Complete online portal presentation for focus groups | Colleen | Feb. 8 | In progress |
| 11 | Contact focus group participants | Region 2 and 3 CRSQs<br>Region 4 and 5 CRSQs<br>Region 1 CRSQ | Feb. 4-8<br>Feb. 12-15<br>Mar. 4 | Will start once list is finalized |
| | **New Items** | | | |

| # | Actions | Who | By When | Status |
|---|---|---|---|---|
| 12 | Schedule a phone call with regional rep and Terri for a week in advance of session to finalize arrangements | Norma | Feb. 8 | |
| 15 | Need to figure out how to manage clients who want to continue to be involved?<br>o Need a consent form at the session. | Terri | Feb. 8 | |
| 16 | Complete thank you certificates for participants:<br>o Printed names for most<br>o Some blanks at end of each session | Terri | Feb. 8 | |
| 17 | Schedule next Steering Committee Meeting for some time during week of Feb. 18. | Darcy | Feb. 4 | |
| 18 | Berlin Eaton and MSD staff to do a rehearsal (before the first session on Feb 13th) with the video clips we want to get feedback on. It may take too long, and we might need to cut them down to one or two of the most important items. | Terri, Berlin Eaton | No later than Feb 12 | |



berlin eaton

Wednesday, January 30, 2012 (11:00 AM - 12:30 PM)

# Client Engagement Focus Groups

## Welcome to the **Steering Committee** Meeting

**Dial in:** s.15,s.17 (Vancouver local)

**ID Code:** s.15,s.17 # (*6 to mute and unmute your phone – thank you)

## Steering Committee:

**Regional Operations:**

| | |
|---|---|
| **Janice Nakamura** | Executive Sponsor |
| **Judy D'Gal** | Project Director |
| **Terri Archer** | Project Management Lead |
| **Darcy Houston** | Project Officer |
| **Pardip Bandechha** | Project Analyst |
| **Jennifer Anholt** | Channel Strategy Communications Manager |
| **Colleen Turner** | Information Management Branch lead *(Client Portal)* |

**Berlin Eaton - contracted facilitation agency:**

| | |
|---|---|
| **Richard Eaton** | Facilitator |
| **Norma Glendinning** | Facilitator |

**MSD Regional Reps (Community Relations Service Quality Managers - CRSQs):**

| | |
|---|---|
| **Jeannine Bousquet & Janis Ruel** | Region 1 |
| **Jean Lofthouse** | Region 2 |
| **Trent Brown** | Region 3 |
| **Harleen Price** | Region 4 |
| **Ian Harrower** | Region 5 |

## Committee Purpose:

- **To develop a common understanding of the project's scope, deliverables, and timeline – *(Documented in a detailed Project Charter)***
- **Assess learning from initial focus group(s) and make adjustments as needed**

## Working Documents:

- **Draft Project Charter**
- **Client Focus Group Session Agenda**

Steering Comm Mtg Agenda (Jan ..

Project Charter - Client Focus...

Standard Focus Group Agenda (for dr

178300 DRAFT IN - Client Engag...

Wednesday, January 30, 2012 (11:00 AM - 12:30 PM)

## Other Documents Submitted for Approval:

- Decision Note for external facilitation (✓ Approved)
- Information Note outlining Focus Group Plan
- PIA – Privacy Impact Assessment
- STRA – Security Threat Risk Assessment

Tuesday, January 22, 2012 (9:00 AM - 10:30 AM)

# Client Engagement Focus Groups

## Welcome to the Steering Committee Kick-off Meeting

**Dial in:** s.15,s.17 (Vancouver local)

**ID Code:** s.15,s.17 (*6 to mute and unmute your phone – thank you)

## Steering Committee:

| Regional Operations: | |
|---|---|
| Janice Nakamura | Executive Sponsor |
| Judy D'Gal | Project Director |
| Terri Archer | Project Management Lead |
| Darcy Houston | Project Officer |
| Pardip Bandechha | Project Analyst |
| Jennifer Anholt | Channel Strategy Communications Manager |
| Colleen Turner | Information Management Branch lead *(Client Portal)* |

| Berlin Eaton - contracted facilitation agency: | |
|---|---|
| Richard Eaton | Facilitator |
| Norma Glendinning | Facilitator |

| MSD Regional Reps (Community Relations Service Quality Managers - CRSQs): | |
|---|---|
| Jeannine Bousquet & Janis Ruel | Region 1 |
| Jean Lofthouse | Region 2 |
| Trent Brown | Region 3 |
| Harleen Price | Region 4 |
| Ian Harrower | Region 5 |

## Committee Purpose:

- To develop a common understanding of the project's scope, deliverables, and timeline – *(Documented in a detailed Project Charter)*
- Assess learning from initial focus group(s) and make adjustments as needed

## Working Documents:

- Draft Project Charter
- Client Focus Group Session Agenda

## Other Documents Submitted for Approval:

- Decision Note for external facilitation (✓ Approved)
- Information Note outlining Focus Group Plan
- PIA – Privacy Impact Assessment
- STRA – Security Threat Risk Assessment

**Targeted questions for Stakeholder Engagement Sessions**
**(re: Channel Strategy / Service Delivery)**

---

**From:** Archer, Terri MSD:EX **Sent:** Tuesday, December 18, 2012 10:51 AM
**To:** Woodcock, Mike S MSD:EX; Turner, Colleen P MSD:EX; Gauthier, Jeff L MSD:EX; Smith, Bruce MSD:EX; Upton, Debi L MSD:EX; LaBoucane, Mary MSD:EX
**Cc:** Nakamura, Janice N. MSD:EX
**Subject:** Targeted questions for Stakeholder Engagement sessions (re: Channel Strategy / Service Delivery)

Good morning all, as the Channel Strategy Chairs I have been asked to connect with you to build a list of questions to which we are trying to get answers through direct engagement with stakeholders.

**Several Stakeholder Engagement initiatives are underway** including organizing Advocate focus group sessions (a F2F session will be conducted at the Learning Center in Vancouver January 8th with subsequent condensed live meeting sessions across the province), drafting of the **Staff Engagement Action Plan**, and drafting the Decision Note(s) for **Client Engagement** – focus groups. The latter is the main focus of this particular inquiry, though there is linkage to the other engagement initiatives.

While the top priority is obtaining feedback to support self serve functionality, we also want to ensure we use this opportunity to enhance the other service channels. As such, I'd appreciate your input and advice on **what questions you would like to see added to the stakeholder engagement initiatives**.

---

**From:** LaBoucane, Mary MSD:EX **Sent:** Monday, December 24, 2012 9:51 AM
**To:** Archer, Terri MSD:EX **Cc:** Upton, Debi L MSD:EX
**Subject:** Targeted questions for Stakeholder Engagement sessions (re: Channel Strategy / Service Delivery)

As requested here are the questions from the **telephony service channel.** Let me know if you need anything further.

1. Since the deployment of the new telephony hours of operations (9am -4pm), have you seen an improvement in reaching our service centres?
2. Did you get through our phone lines right away? Were you satisfied with the length of time it took to get through to us on the phone?
3. Do you find the messaging in the phone system useful? What type of messaging would you like to see upfront before reaching a worker?
4. How many attempts did you make to reach a worker?
5. Why did you make multiple attempts? (# prefer phones)
6. If you had the option to leave your number and receive a call back from a worker, how likely would you be to utilize this option? Why?
7. How was the service you received? Were you satisfied with the service you received?
8. Are phones your preferred approach to the Ministry? Why?
9. How can we improve our services over the phone to serve you better?

Mary La Boucane **250 508 2336**
Manager, Telephony Project, Provincial Services, Regional Services Division, Ministry of Social Development

---

Mike Woodcock -- **RE: Targeted questions you would like to see incorporated into the engagement initiatives**

*Info through the Hours of Contact documents really come down to two questions:*

- Type of request (which I interpret as, what brought you down to the office today?)
- Have you tried another service channel (e.g. telephone, web/internet, or SSAA)?

*Questions of access*

- Is it challenging to get to an office for F2F service? Is there a cost (transit, parking, etc ) to get to an office? Access to a telephone -- if so, cost factor of phone, cell time, access to computer (desk top, iphone, WIFI, etc.) Do you use the phone, internet access resources available through community agencies, Employment Service Centres?
- If you prefer F2F over other access channels, why?
- Do you use phones and internet for other business (banking, utilities, etc.) interactions?
- Like to know client's experience with our call centre (1-866). More specifically, their impressions if they have used it since August as the phones have performed better than F2F service during this period.
- How important is 24/7 access to services to you?
- In comparing going to an Employment and Assistance office or using the 1-866 phone service to meet your need, if you were consistently able to reach an agent on the phone with an under 2 minutes wait, would you go to the office or use the phone?

**Targeted questions for Stakeholder Engagement Sessions**
**(re: Channel Strategy / Service Delivery)**

---

**From:** Archer, Terri MSD:EX **Sent:** Tuesday, December 18, 2012 10:51 AM
**To:** Woodcock, Mike S MSD:EX; Turner, Colleen P MSD:EX; Gauthier, Jeff L MSD:EX; Smith, Bruce MSD:EX; Upton, Debi L MSD:EX; LaBoucane, Mary MSD:EX
**Cc:** Nakamura, Janice N. MSD:EX
**Subject:** Targeted questions for Stakeholder Engagement sessions (re: Channel Strategy / Service Delivery)

Good morning all, as the Channel Strategy Chairs I have been asked to connect with you to build a list of questions to which we are trying to get answers through direct engagement with stakeholders.

Several **Stakeholder Engagement initiatives are underway** including organizing Advocate focus group sessions (a F2F session will be conducted at the Learning Center in Vancouver January 8th with subsequent condensed live meeting sessions across the province), drafting of the **Staff Engagement Action Plan**, and drafting the Decision Note(s) for **Client Engagement** – focus groups. The latter is the main focus of this particular inquiry, though there is linkage to the other engagement initiatives.

While the top priority is obtaining feedback to support self serve functionality, we also want to ensure we use this opportunity to enhance the other service channels. As such, I'd appreciate your input and advice on **what questions you would like to see added to the stakeholder engagement initiatives.**

---

**From:** LaBoucane, Mary MSD:EX **Sent:** Monday, December 24, 2012 9:51 AM
**To:** Archer, Terri MSD:EX **Cc:** Upton, Debi L MSD:EX
**Subject:** Targeted questions for Stakeholder Engagement sessions (re: Channel Strategy / Service Delivery)

As requested here are the **questions from the telephony service channel**. Let me know if you need anything further.

1. Since the deployment of the new telephony hours of operations (9am -4pm), have you seen an improvement in reaching our service centres?
2. Did you get through our phone lines right away? Were you satisfied with the length of time it took to get through to us on the phone?
3. Do you find the messaging in the phone system useful? What type of messaging would you like to see upfront before reaching a worker?
4. How many attempts did you make to reach a worker?
5. Why did you make multiple attempts? (# prefer phones)
6. If you had the option to leave your number and receive a call back from a worker, how likely would you be to utilize this option? Why?
7. How was the service you received? Were you satisfied with the service you received?
8. Are phones your preferred approach to the Ministry? Why?
9. How can we improve our services over the phone to serve you better?

Mary La Boucane **250 508 2336**
Manager, Telephony Project, Provincial Services, Regional Services Division, Ministry of Social Development

Mike Woodcock – **RE: Targeted questions you would like to see incorporated into the engagement initiatives**

*Info through the Hours of Contact documents really came down to two questions:*

- Type of request (which I interpret as, what brought you down to the office today?)
- Have you tried another service channel (e.g. telephone, web/internet, or SSAA)?

*Questions of access*

- Is it challenging to get to an office for F2F service? Is there a cost (transit, parking, etc ) to get to an office? Access to a telephone – if so, cost factor of phone, cell time, access to computer (desk top, iphone, WIFI, etc.) Do you use the phone, internet access resources available through community agencies, Employment Service Centres?
- If you prefer F2F over other access channels, why?
- Do you use phones and internet for other business (banking, utilities, etc.) interactions?
- Like to know client's experience with our call centre (1-866). More specifically, their impressions if they have used it since August as the phones have performed better than F2F service during this period.
- How important is 24/7 access to services to you?
- In comparing going to an Employment and Assistance office or using the 1-866 phone service to meet your need, if you were consistently able to reach an agent on the phone with an under 2 minutes wait, would you go to the office or use the phone?

## CLIENT FOCUS GROUP TIMELINE

| Timeline | Deliverable | Lead |
|---|---|---|
| Jan 14-18 | Information Note, PIA, STRA & start Project Charter | Terri / Darcy |
| Jan 21-25 | Approvals for IN, PIA & STRA | Terri / Darcy |
| | Steering Committee kick off mtg & finalize Charter | Terri & Steering Committee |
| | Finalize contract with Berlin Eaton | Terri & Steering Committee |
| Jan 28 - Feb 1 | Secure venues, finalize details & identify participants for Regions 2 & 3 focus group sessions | Steering Committee & Regional leads |
| Feb 4-8 | Contact focus group participants for Regions 2 & 3 | TBD |
| | Secure venues, finalize details & identify participants for Regions 4 & 5 focus group sessions | Steering Committee & Regional leads |
| Feb 12-15 | Conduct Regions 2 & 3 focus group sessions | Berlin Eaton & MSD reps |
| | Contact focus group participants for Regions 4 & 5 | TBD |
| | Secure venues, finalize details & identify participants for Region 1 focus group sessions | Steering Committee & Regional leads |
| Feb 18-22 | Steering Committee mtg to review session & make adjustments | Terri & Steering Committee |
| Feb 25-Mar 1 | Conduct Regions 4 & 5 focus group sessions | Berlin Eaton & MSD reps |
| Mar 4-8 | Steering Committee mtg to review session & make adjustments | Steering Committee |
| | Contact focus group participants for Region 1 | TBD |
| Mar 11 - 15 | Conduct Region 1 focus group session(s) | Berlin Eaton & MSD reps |
| Mar 18-22 | Final report from Berlin Eaton | Berlin Eaton |
| Mar 25 - 28 | Steering Committee mtg to review final report | Terri & Steering Committee |

| Date | Focus Group | Venue | Pcode | | |
|---|---|---|---|---|---|
| | | | s.22 | | |
| 13-Feb-13 | Region 2 Focus Group - **Contact:** Darleen Walker | Library | | Sent list 5Feb2013 | **Complete** |
| 14-Feb-13 | Region 3 Focus Group - **Contact:** Denise Seder | Kwantlen University, 12666 72nd Avenue Surrey | V3W 2M8 | Sent list 5Feb2013 | **Complete** |
| 26-Feb-13 | Region 4 Focus Group - **Contact: Angie Fryer / Jeremy Cummings /** Harleen Price | John Howard Society, 1440 St. Paul Street, Kelowna | V1Y 2E6 | Sent list 14Feb2013 | **Complete** |
| 28-Feb-13 | Region 5 Focus Group - **Contact:** Ian Harrower - 250 565-4478 | Prince George Native Friendship Centre – 1600 3rd Avenue | V2L 3G6 | Sent list 14Feb2013 | |

| | | | | |
|---|---|---|---|---|
| 12-Mar-13 | Region 1 Focus Group - **Contact: Jeannine Bousquet** / Janis Ruel - Regional Office line @ 250 739-6600 | Clubhouse at Bowen Park complex in Nanaimo | V9R 1Z7 | Sent list 20Feb2013 |
| 13-Mar-13 | Region 1 Focus Group - **Contact: Pardip Bandechha** | Downtown Library in Victoria | V8W 3H2 | Sent list 27Feb2013 |

| | PRE PLAN | JUL 23-27 | JUL 30-AUG 3 | AUG 7-10 | AUG 13-17 | AUG 20-24 | AUG27-31 | SEP 4-7 | SEP 10-14 | SEP 17-21 | SEP 24-28 | OCT 1-5 | OCT 8-12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Client Engagement Plan Approved | | | | | | | | | | | | | |
| Develop Project Charter | | | | | | | | | | | | | |
| **Facilities** | | | | | | | | | | | | | |
| Confirm Meeting Location/Date | | | | | | | | | | | | | |
| Confirm AV Equipment | | | | | | | | | | | | | |
| Confirm Room Set up ie round tables | | | | | | | | | | | | | |
| Confirm breakout rooms | | | | | | | | | | | | | |
| Confirm when staff can get into the room for setup | | | | | | | | | | | | | |
| Confirm Meal Plan and Meal Times | | | | | | | | | | | | | |
| **Facilitators** | | | | | | | | | | | | | |
| Confirm # of Facilitators | | | | | | | | | | | | | |
| Confirm Main Facilitators (Lead Person) | | | | | | | | | | | | | |
| Meet with Facilitators to go over their role | | | | | | | | | | | | | |
| Meet with Facilitators to go over draft Agenda/Plan | | | | | | | | | | | | | |
| Confirm # of breakout rooms required with Failitators | | | | | | | | | | | | | |
| **Budget and Tracking** | | | | | | | | | | | | | |
| Get a Project Code | | | | | | | | | | | | | |
| Develop Budget for the Meals and Evening Event | | | | | | | | | | | | | |
| **Participants** | | | | | | | | | | | | | |
| Draft Expression Of Interest Invitation | | | | | | | | | | | | | |
| Send Invitations & details | | | | | | | | | | | | | |
| Confirm ministry representatives | | | | | | | | | | | | | |
| Send out note asking for any dietry restrictions | | | | | | | | | | | | | |
| **Session** | | | | | | | | | | | | | |
| Develop draft Agenda and focus questions | | | | | | | | | | | | | |
| Work with Citizen Services on Draft Focus Question | | | | | | | | | | | | | |
| Focus Group Concept and Agenda to SOEC for input | | | | | | | | | | | | | |
| Draft Agenda to SOEC | | | | | | | | | | | | | |
| Draft Agenda and Concept to Oversight | | | | | | | | | | | | | |
| Approval of focus questions and agenda | | | | | | | | | | | | | |
| Confirm facilitators for each break out session | | | | | | | | | | | | | |
| Develop background information for Session (i.e., presentation) | | | | | | | | | | | | | |
| **Communication - Internal** | | | | | | | | | | | | | |
| Develop ADM/DM Draft Message | | | | | | | | | | | | | |
| Send Out ADM/DM Message | | | | | | | | | | | | | |
| **ADM Chatline** | | | | | | | | | | | | | |
| Communications Materials development [external] | | | | | | | | | | | | | |
| Communications Plan approval | | | | | | | | | | | | | |
| **Administrative Task** | | | | | | | | | | | | | |
| Confirm Meeting Supplies with Facilitators | | | | | | | | | | | | | |
| Order Name Tags, flip chart, binders, pens etc | | | | | | | | | | | | | |
| Book Lap Top & Power Point Projector etc..... | | | | | | | | | | | | | |
| **Evaluation Form** | | | | | | | | | | | | | |
| Develop Evaluation Form for Conference | | | | | | | | | | | | | |
| Record of proceedings - Report? | | | | | | | | | | | | | |
| Have a debrief session with the facilitators | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| *Green = activity should begin* | | | | | | | | | | | | | |
| *Blue = activity should finish/have approval* | | | | | | | | | | | | | |
| *Red = critical milestone date - cannot be exceeded without risk to project* | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| **Resources:** | | | | | | | | | | | | | |
| Pardip Bandechha, ??? | | | | | | | | | | | | | |
| Judy D'Gal | | | | | | | | | | | | | |

| | |
|---|---|
| **From:** | Bandechha, Pardip MSD:EX |
| **Sent:** | Tuesday, January 8, 2013 8:59 AM |
| **To:** | D'Gal, Judy MSD:EX; Shenton, Kim MSD:EX; Shearer, Sandy MSD:EX; Archer, Terri MSD:EX; Anholt, Jennifer A MSD:EX |
| **Cc:** | Houston, Darcy L MSD:EX |
| **Subject:** | FW: Follow up Cliff: 177990 |

Please note that Wes has signed off and confirmed that the DM does not need approve the Client Engagement Funding DN (cliff 177990).

Thanks
Pardip

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

**This message is confidential and may not be disclosed to anyone without the express written consent of the sender**

---

**From:** Guidoriagao, Kimberley MSD:EX
**Sent:** Tuesday, January 8, 2013 8:52 AM
**To:** Bandechha, Pardip MSD:EX
**Subject:** RE: Follow up Cliff: 177990

Good morning Pardip,

I just spoke to Wes, and he confirmed that Mark does not need to approve the Client Engagement Funding.

Thank you
Kimberley

---

**From:** Bandechha, Pardip MSD:EX
**Sent:** Tuesday, January 8, 2013 8:49 AM
**To:** Guidoriagao, Kimberley MSD:EX
**Subject:** Follow up Cliff: 177990

Hi Kimberley

I am so sorry to keep bothering you with the status of this note, but our forecast has to be in today. I am wondering if Wes got back to you on if he was the final sign off for the note.

Thanks again for all your help.

Pardip

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

**This message is confidential and may not be disclosed to anyone without the express written consent of the sender**

## MINISTRY OF SOCIAL DEVELOPMENT
## INFORMATION NOTE

**DATE:** April 11, 2013

**PREPARED FOR:** Mark Sieben, Deputy Minister

**ISSUE:** Channel Strategy – External Engagement Feedback and Next Steps

**BACKGROUND:**

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and determine and monitor client satisfaction on an ongoing basis.

Regional Operations initiated a primary consultation process with external stakeholders to seek feedback on current service delivery channels and the Online Client Portal prototype.

Two streams of focus group sessions (advocacy organizations and clients) were completed concurrently between January and March 2013. Feedback from these sessions has been consolidated into two reports for each stakeholder group: a Full Report and an Executive Summary (see Appendix 1 through 4). Each Executive Summary provides a high level summary of the sessions and feedback. The executive summaries can be made available to staff via posting on the internal Channel Strategy webpage, as an update on the ministry's external engagement initiatives.

Regional Operations will now begin to develop a comprehensive workplan that incorporates all feedback and identifies the ministry's plans and priorities in the context of each issue. Regional Operations will work closely with the designated Executive Director Channel leads to identify and prioritize opportunities that will inform further service delivery enhancements and form the basis for providing future updates to external stakeholders.

**DISCUSSION:**

*Advocacy Organizations*

An initial focus group session was held face-to-face in Vancouver for advocacy organizations from Regions 2 and 3 that provide direct service to our clients. Advocates worked together to identify priority service delivery enhancements for the ministry's consideration.

Subsequent focus group sessions were held by five meeting with other advocacy organizations throughout each region of the province. A total of 58 advocates, representing approximately 45 advocacy organizations, attended the sessions.

*Clients*

Seven client focus group sessions were held face-to-face across the province in Victoria, Nanaimo, Surrey, Kelowna, Prince George and two in Vancouver. In total, 71 clients attended the sessions.

**CONCLUSION:**

The focus of these feedback sessions was to launch a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels. The priority was to engage in a broad and open dialogue with our external stakeholders to obtain feedback on our service channels, including the Online Client Portal prototype.

Reaching out to advocacy organizations and clients for their feedback on the current service delivery experience has been a very positive step forward. These external stakeholders were very pleased that the ministry asked them for feedback.

The consolidated feedback from these external stakeholders, combined also with feedback received from staff, will assist in determining our current service delivery effectiveness and inform future service delivery decisions.

As the ministry moves forward with the Channel Strategy, we plan to seek further feedback from these stakeholders through various engagement initiatives.

**Attachments:**
Appendix 1 – Channel Strategy – Advocate Focus Groups Executive Summary
Appendix 2 – Channel Strategy – Client Focus Groups Executive Summary
Appendix 3 – Channel Strategy – Advocate Focus Groups Full Report
Appendix 4 – Channel Strategy – Client Focus Groups Full Report

## MINISTRY OF SOCIAL DEVELOPMENT
## INFORMATION NOTE

| Prepared by: | Reviewed By: | Initial: | Date: |
|---|---|---|---|
| Terri Archer<br>Senior Manager, Stakeholder Relations<br>Regional Operations<br>(250) 356-6718 | Judy D'Gal<br>Director, Implementation and Stakeholder Relations<br>Regional Operations | _____ | _____ |
| | Janice Nakamura<br>Executive Director<br>Regional Operations | _____ | _____ |

**MINISTRY OF SOCIAL DEVELOPMENT**
**INFORMATION NOTE**

**DATE:** April 11, 2013

**PREPARED FOR:** Mark Sieben, Deputy Minister

**ISSUE:** Channel Strategy – External Engagement Feedback and Next Steps

## BACKGROUND:

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and determine and monitor client satisfaction on an ongoing basis.

Regional Operations initiated a primary consultation process with external stakeholders to seek feedback on current service delivery channels and the Online Client Portal prototype.

Two streams of focus group sessions (advocacy organizations and clients) were completed concurrently between January and March 2013. Feedback from these sessions has been consolidated into two reports for each stakeholder group: a Full Report and an Executive Summary (see Appendix 1 through 4). Each Executive Summary provides a high level summary of the sessions and feedback. The executive summaries can be made available to staff via posting on the internal Channel Strategy webpage, as an update on the ministry's external engagement initiatives.

Regional Operations will now begin to develop a comprehensive workplan that incorporates all feedback and identifies the ministry's plans and priorities in the context of each issue. Regional Operations will work closely with the designated Executive Director Channel leads to identify and prioritize opportunities that will inform further service delivery enhancements and form the basis for providing future updates to external stakeholders.

## DISCUSSION:

*Advocacy Organizations*

An initial focus group session was held face-to-face in Vancouver for advocacy organizations from Regions 2 and 3 that provide direct service to our clients. Advocates worked together to identify priority service delivery enhancements for the ministry's consideration.

Subsequent focus group sessions were held by live meeting with other advocacy organizations throughout each region of the province. A total of 58 advocates, representing approximately 45 advocacy organizations, attended the sessions.

*Clients*

Seven client focus group sessions were held face-to-face across the province in Victoria, Nanaimo, Surrey, Kelowna, Prince George and two in Vancouver. In total, 71 clients attended the sessions.

**CONCLUSION:**

The focus of these feedback sessions was to launch a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels. The priority was to engage in a broad and open dialogue with our external stakeholders to obtain feedback on our service channels, including the Online Client Portal prototype.

Reaching out to advocacy organizations and clients for their feedback on the current service delivery experience has been a very positive step forward. These external stakeholders were very pleased that the ministry asked them for feedback.

The consolidated feedback from these external stakeholders, combined also with feedback received from staff, will assist in determining our current service delivery effectiveness and inform future service delivery decisions.

As the ministry moves forward with the Channel Strategy, we plan to seek further feedback from these stakeholders through various engagement initiatives.

**Attachments:**
Appendix 1 – Channel Strategy – Advocate Focus Groups Executive Summary
Appendix 2 – Channel Strategy – Client Focus Groups Executive Summary
Appendix 3 – Channel Strategy – Advocate Focus Groups Full Report
Appendix 4 – Channel Strategy – Client Focus Groups Full Report

## MINISTRY OF SOCIAL DEVELOPMENT
## INFORMATION NOTE

| Prepared by: | Reviewed By: | Initial: | Date: |
|---|---|---|---|
| Terri Archer<br>Senior Manager, Stakeholder Relations<br>Regional Operations<br>(250) 356-6718 | Judy D'Gal<br>Director, Implementation and Stakeholder Relations<br>Regional Operations | _____ | _____ |
| | Janice Nakamura<br>Executive Director<br>Regional Operations | _____ | _____ |
| | Sharon Moysey<br>Assistant Deputy Minister<br>Regional Services Division | _____ | _____ |
| | Susan Mader<br>Communications Director<br>Government Communications and Public Engagement | _____ | _____ |

| Region | Name | Category | Follow Up Project | Contact Information |
|---|---|---|---|---|
| **Region 1** | s.22 | | [redacted] | |
| Victoria | | | No | |
| Victoria | | | No | |
| Victoria | | | [redacted] | |
| Victoria | | | No | |
| Victoria | | | No | |
| Victoria | | | No | |
| Victoria | | | No | |
| Victoria | | | No | |
| **Region 1** | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | [redacted] | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | [redacted] | |
| Nanaimo | | | No | |
| Nanaimo | | | No | |
| Nanaimo | | | [redacted] | |
| Nanaimo | | | No | |
| **Region 2** | | | No | |
| | | | No | |
| **Region 2** | | | No | |
| | | | No | |
| | | | [redacted] s.22 | |
| | | | [redacted] | |
| | | | No | |
| | | | [redacted] | |
| | | | No | |
| | | | [redacted] | |

| | |
|---|---|
| **Total Clients Consulted** | 71 |
| Total Employable | 19 |
| Total PPMB | 10 |
| Total PWD | 38 |
| [redacted] | 2 |
| Client Catergory Unknow | 2 |
| ***Total Follow Up Project*** | 20 |

| | |
|---|---|
| s.22 | s.22 |
| | |
| | |
| | |
| | |
| | |
| | No |
| Region 3 | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| Region 4 | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| Region 5 | No |
| | No |
| | No |
| | No |
| | No |
| | No |
| | No |

| | | |
|---|---|---|
| s.22 | No | |
| | | |
| | | |

Page 431 to/à Page 433

Withheld pursuant to/removed as

DUPLICATE

## Ministry of Social Development Channel Strategy
## Region 2 Client Focus Group: Vancouver

**Date and Timing:** 10:00am to 2:30pm – Monday, March 25, 2013

**Purpose:** To obtain feedback on existing service channels as well as a new online client portal.

**Location:** Library Square Conference Centre – Vancouver Public Library, 350 West Georgia (Peter Kaye room)

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10.00am | Welcome and introductions | Elaine Cross |
| 10.30 am | Introduce Ministry's Channel Strategy | Terri Archer |
| 10.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement:<br>• Face to Face<br>• Phone<br>• Online e.g., Self-Serve Assessment and Application<br>• Other:<br>o Mail<br>o Fax<br>o Email | Elaine Cross |
| 11.30am | Presentation of Ministry Website and Client Online Portal demos and obtain feedback | Terri Archer (*demos*)<br>Elaine Cross (*feedback*) |
| 12.00pm | Lunch | |
| 12.15pm | Online demos cont'd | Terri |
| 1.00pm | Predicting the Future *(Rate your desire to use this channel in the future)* | Elaine Cross |
| 2.15pm | Summary of actions and next steps<br>• hand out session survey<br>• invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Elaine Cross<br>Post Session Survey.docx |
| By 2.30pm | Closing remarks and adjourn | Terri Archer |

## Attendance

- [x] clients attended
    - [x] volunteered to stay involved with the project and be contacted in follow-up

## Feedback on the Service Channels

***Key Themes:***

•

### Phone

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

### Face to Face

***Key Theme:***

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Online**

***Key Theme*:**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

**Email**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average: [x]** | |
|---|---|
| Working Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating:** | |

**Mail**

| **Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?**<br><br>**Average:** | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| **On a scale between 1 and 10, please rate your desire to use this channel in the future:**<br><br>**Average Rating: [x]** | |

### Fax

| Where "1" is least satisfied and "10" is most satisfied, how satisfied are you currently with this service channel?<br><br>Average: | |
|---|---|
| Worked Well | Needs to Improve |
| • | • |
| On a scale between 1 and 10, please rate your desire to use this channel in the future:<br><br>Average Rating: [x] | |

### General Comments:

- Differentiating needs would be better; easy and quick access to temporary support would be great.
- How do I know if a decision is worker error or discretion?

### Summary of Ratings from Above

| | Current Satisfaction with Channel | Desire to Use Channel in the Future |
|---|---|---|
| Face-to-Face | | |
| On-line | | |
| Telephone | | |
| Email | | |
| Fax | | |
| Mail | | |

## Client Online Portal Presentation and Feedback

### General Feedback

- Don't lose information on current website.
- Consider surveying clients on use of computers
- Need ministry contact information somewhere on the portal
- Make it compatible for Smart phones
- Each page should have links to previous pages

**1. Launch Page**

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

**2. How to and FAQ's**

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

**3. Browse Resources?**

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

**4. Find a Form**

**Would You Use It?**

- [x/y]

**What do you like about it?**

-

**What would make it better?**

-

### 5. Find an office

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 6. Your Account

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 7. Message Board

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 8. Submit a document

**Would You Use It?**

- [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### 9. Ask a question online

**Would You Use It?**

• [x/y]

**What do you like about it?**

•

**What would make it better?**

•

### Output from Service Channel Exercise (Morning and Afternoon)

[attach any session photos]

### Post Session Survey Results

The Post Session Survey was administered to the participants at the end of the workshop. The purpose of this survey is to provide feedback and information to incorporate into planning activities for future sessions and meetings. Information gathered fall into the following categories:

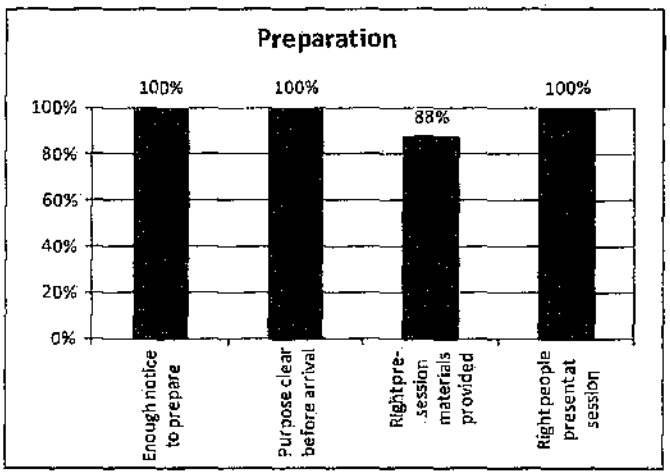
- Overall Score out of 10
- Preparation
- Agenda
- Delivery
- Results

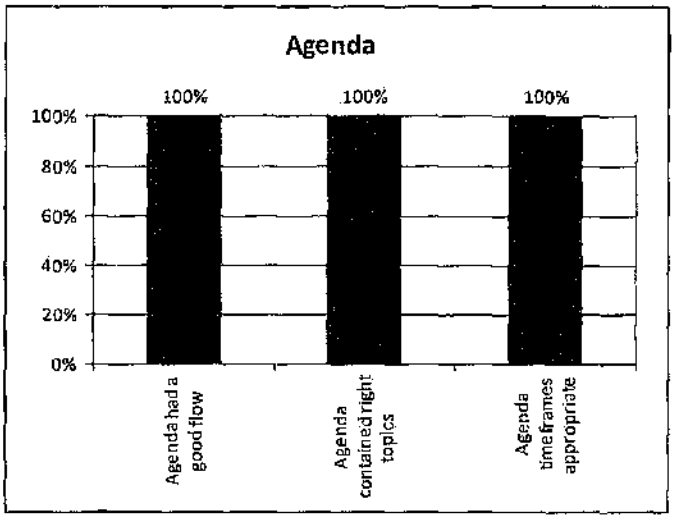
The graphed results report the percentage of respondents that agree (scoring either 4 or 5), to a series of statements related to their perception of how they viewed the session. Any scores where less than 80% agree are generally noted for future action.

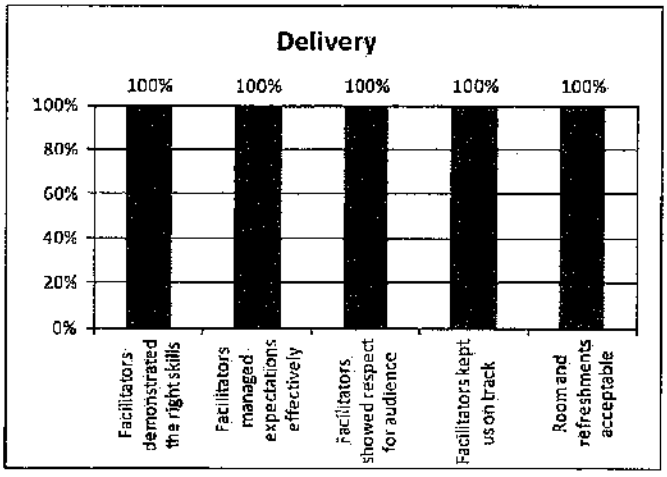
The total number of responses was 8.

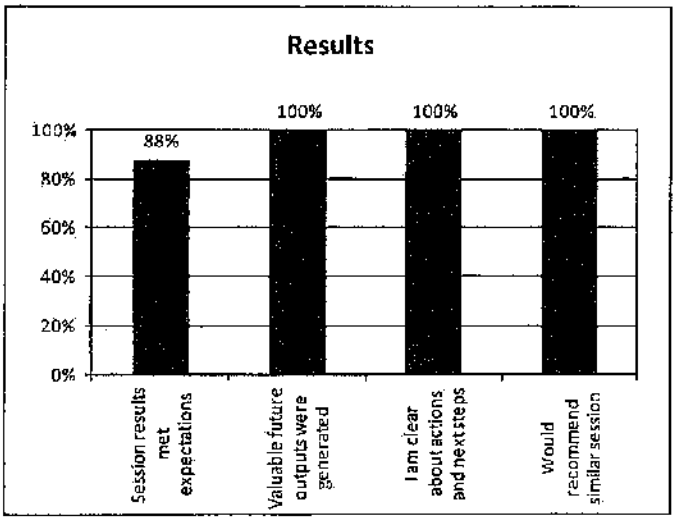
The overall score out of 10 was 9.3, or 93%.

**Survey Responses**






**Written Comments**

**My most significant learning from this workshop was:**

•

**Future workshops like this could be improved by:**

•

**Other comments:**

•

## Focus Group Session Notes

The following notes were copied and pasted from all of the regional notes, including the Vancouver session on March 25, 2013. Obvious duplication was removed and replaced with a bracket containing the number of times this comment was made. Some obvious, high level theming was done for the face to face and telephone channels to make it easier to get through them.

### Online

| Working Well | Needs Improvement |
|---|---|
| • If client is computer literate "enough," can get some helpful info - but still need to go to the office **(x2)**<br>• Nice to be able to go to main Social Development website for new bulletins (but they disappear)<br>• Links to cheque issue day<br>• Good, quick, fast, good list of what to bring in<br>• Prompts people to print something to hand in which is especially good for PWD/brain injuries<br>• Very informative IF you know where and how to look<br>• Don't have to go out especially if sick or physically unable<br>• Library has computers<br>• Some good use for information online **(x3)**<br>• Outreach, employees will help us use computers<br>• Computers available in MSD Offices, which is good, but they are unused<br>• POVNET is a good advocacy resource<br>• GT Hiring is good (Ministry liaison) – helps with finding jobs and clothes<br>• Employment programs<br>• Can lookup account online and email through account (with portal)<br>• Computer is easier<br>• Can go to the library if no computer at home<br>• For basic info, computer good<br>• Policy helps, but a lot depends on discretion of the worker and precedence from appeals<br>• Likes one line options – online is impersonal, but good options to have SSAA, was a good medium to give all the tools. | • Staff don't know what forms to use **(x2)**<br>  o E.g., Monthly nutritional supplement takes 3 trips to the office.<br>• Travel subsidy form: couldn't find it.<br>• Most people can't afford a computer; don't have one; not accessible **(x2)**<br>• Clients not computer literate **(x5)**<br>• Does not meet needs of some mental health clients<br>• Internet charges/costs<br>• If using computer at a library, not private enough<br>• 'Sample' printed across the form means we can't use it; privacy concerns **(x3)**<br>• Complex search – not user friendly engine that can only be utilized by experienced users; hard to navigate OLR website **(x6)**<br>• Not aware of online services<br>• Google: Social Services PG = lots of hits for PG Washington<br>• Didn't know it existed; unaware of what's available **(x5)**<br>• Impersonal<br>• Competition for library computers with kids, etc.<br>• No access to computers<br>• Have to wait to use a computer: access a challenge even with other Outreach facilities<br>• MSD staff should help orient us, worker help to use computers<br>• Office computers don't work/broken **(x2)**<br>• Mostly useful for initial application and job search, not other uses<br>• Eligibility for rate tables is hard to find.<br>• |

## Focus Group Session Notes

The following notes were copied and pasted from all of the regional notes, including the Vancouver session on March 25, 2013. Obvious duplication was removed and replaced with a bracket containing the number of times this comment was made. Some obvious, high level theming was done for the face to face and telephone channels to make it easier to get through them.

### Online

| Working Well | Needs Improvement |
|---|---|
| • If client is computer literate "enough," can get some helpful info - but still need to go to the office (x2)<br>• Nice to be able to go to main Social Development website for new bulletins (but they disappear)<br>• Links to cheque issue day<br>• Good, quick, fast, good list of what to bring in<br>• Prompts people to print something to hand in which is especially good for PWD/brain injuries<br>• Very informative IF you know where and how to look<br>• Don't have to go out especially if sick or physically unable<br>• Library has computers<br>• Some good use for information online (x3)<br>• Outreach, employees will help us use computers<br>• Computers available in MSD Offices, which is good, but they are unused<br>• POVNET is a good advocacy resource<br>• GT Hiring is good (Ministry liaison) – helps with finding jobs and clothes<br>• Employment programs<br>• Can lookup account online and email through account (with portal)<br>• Computer is easier<br>• Can go to the library if no computer at home<br>• For basic info, computer good<br>• Policy helps, but a lot depends on discretion of the worker and precedence from appeals<br>• Likes one line options – online is impersonal, but good options to have SSAA, was a good medium to give all the tools. | • Staff don't know what forms to use (x2)<br>o E.g., Monthly nutritional supplement takes 3 trips to the office.<br>• Travel subsidy form: couldn't find it.<br>• Most people can't afford a computer; don't have one; not accessible (x2)<br>• Clients not computer literate (x5)<br>• Does not meet needs of some mental health clients<br>• Internet charges/costs<br>• If using computer at a library, not private enough<br>• 'Sample' printed across the form means we can't use it; privacy concerns (x3)<br>• Complex search – not user friendly engine that can only be utilized by experienced users; hard to navigate OLR website (x6)<br>• Not aware of online services<br>• Google: Social Services PG = lots of hits for PG Washington<br>• Didn't know it existed; unaware of what's available (x5)<br>• Impersonal.<br>• Competition for library computers with kids, etc.<br>• No access to computers<br>• Have to wait to use a computer: access a challenge even with other Outreach facilities<br>• MSD staff should help orient us, worker help to use computers<br>• Office computers don't work/broken (x2)<br>• Mostly useful for initial application and job search, not other uses<br>• Eligibility for rate tables is hard to find.<br>• Keep is simple: pick lists, etc.<br>• Following the steps to get to "yes" results in "no" decision and not sure why.<br>• Amendments discontinued items still on website = frustrating. Take it off (or move it into an archive) vs. "dangle" like a carrot. Have/show what I can get now.<br>• Can't print frequently used forms (like request for medical equipment).<br>• Application online didn't fill out correctly and took |

| Working Well | Needs Improvement |
|---|---|
| | a long time to fix<br>▪ Took multiple attempts to apply (ministry couldn't find my application)<br>▪ No online option to communicate with Ministry<br>▪ Never used online before<br>▪ Online application was confusing – took three times- then needed an advocate to help<br>▪ Would like a quick link to resources available.<br>▪ Cafes don't feel secure<br>▪ Saying it's a computer problem feels like a cop out<br>▪ Fear of using computer; dehumanizing (x2)<br>▪ People with disability – difficult to use<br>▪ Online channel able to acknowledge (i.e. sent receipt)<br>▪ A year to be fit enough to get into office<br>▪ Better explanation of options (i.e. home visits for people too sick to come into office), true for all channels)<br>▪ Give information so clients can make informed decisions<br>▪ More information on process, rights and responsibilities online (i.e. leisure pass)<br>▪ Would be good to have customized and streamlined to clients circumstances (x2)<br>▪ Computer in Fairview office – good but would be better to have staff available to walk "lovingly" through process<br>▪ Cut backs on things like transit pass creates barriers to finding employment<br>▪ Not enough background info – video explaining process, step by step, would be good.<br>▪ Confidentiality of social assistance didn't work<br>▪ Very kind, patient, explained everything didn't needed to know. |



berlin eaton

**Face to Face**

| Works Well | Needs Improvement |
|---|---|
| • Any discussion or planning required—face to face<br>• Not as intimidating to go into an office as before, but some people still think so<br>• Sleep apnea—got a diagnosis—needed a form staff didn't know what form to use but consulted supervisor and 2nd time, got the form.<br>• Got good/excellent service (x3)<br>• Advocate with client works well (x3)<br>• Workers doing their best but massive knowledge gaps<br>• Drop off in drop box works well<br>• Mostly respectful and helpful<br>• Crucial service<br>• Articulate problems more clearly; better communication (x3)<br>• Get forms in faster (submitting)<br>• Learn more thru being engaged in conversation (x2)<br>• Update your file immediately<br>• Faster response(x2)<br>• Easier to gauge reaction<br>• Problem solving is easier<br>• Get forms you need filled in faster by doctors and others vs. mail.<br>• Get more respect than over the phone (x4)<br>• Personal relationship with the worker and get some feedback that makes me feel better about myself—sense that someone cares (x5)<br>• Listen to the opinions of others and helps to get perspective and find out about other resources<br>• Technology doesn't care about you, but people do<br>• 80-85% of workers in the ministry are fantastic.<br>• Outreach at Balmoral Hotel;<br>  o Helped out faster<br>  o Can get things done same day<br>• Pandora St. office in Victoria managing their office well<br>• The Outreach workers are knowledgeable and helpful.<br>• The Greater Victoria Coalition to end homelessness is working well<br>• Outreach: I get told to go to the MSD Office vs. getting help. MSD staff provided better service.<br>• John Mollta (MSD Outreach worker) goes to the mission and provides temporary office outreach: get the right answer quickly.<br>• When there are no big lineups, it generally goes well in the office (x2)<br>• CMHA approach is good. Able to access a worker | • Newton office: have to stand outside for over an hour—Port Coquitlam too (long wait at the office) (x2)<br>• Dismissed by staff. Difficult; staff not telling people what they are eligible for (x4)<br>• Waiting outside a problem: fill people, new babies, 30 people will needs. Need bigger facilities<br>• Safety issues at lineups (x2)<br>• Offices distant from where I live<br>• Taking kids into the office a challenge and makes us feel bad<br>• Unaware of all the services available e.g., drop-offs<br>• Some agencies will help people file for free—communicate this<br>• Some staff at offices not aware of how to manage some client issues (e.g., advocate card recognition) (x3)<br>• Inconsistent approach to advocates from office<br>• Delays for PWD clients can be serious re. Mental Health.<br>• Should have access to a booklet that tells us what is eligible (PWD).<br>• Front line triaging:<br>  o Multiple waiting areas<br>  o Get better @ triage and determine which worker needs to be involved especially PWD. Need a trained worker<br>• Some workers "assume" that you are there for fraudulent purposes<br>• Before (1986): connected with trained social worker for PWD<br>• No continuity of care<br>• Service varies depending on time of month re. cheque issue; The only time I get consistent service is when I have an advocate with me (x5)<br>• Must be stressful for staff<br>• I try to go in during a 'lull': e.g., 1 week into the month.<br>• Staff should try to clear 'flagged' issues earlier in the month:<br>  o Clients should get a warning/heads-up early<br>• Lack of info on what's available via PWD (e.g., didn't know dental was available")<br>• Staff sometimes tell us to 'contact Victoria' with no contact # or other info<br>• Wait times for PWD payments is 4 weeks with no income (x3)<br>• Lack of sensitivity, knowledge with frontline. |

| Works Well | Needs Improvement |
|---|---|
| quickly and get served immediately.<br>• Case load worker approach is best. More personal attention.<br>• Helped me get a bank account so I could do direct deposit and not wait in line.<br>• Westbank Office is much easier to deal with. (And they knew/recognized me)<br>• Understand what I'm asking<br>• Quick access to workers<br>• Single parent services upstairs is great, staff have been wonderful; downstairs service is less personal/not as nice or friendly<br>• Disability office was great<br>• Works well if client is prepared (Vancouver) and looks professional<br>• Gateway of face to face worked well<br>• Better for those with literacy challenges<br>• TAPS – advocacy group is very helpful<br>• Workers identify things clients are eligible for but not receiving<br>• Big different between offices, i.e. line ups, wait times, balance so more consistent service<br>• Dedicated workers (file updates once a year) who know what going on – would work better<br>• Outreach workers/liaison, 3rd party office is good (x2). | • Need more workers so not waiting in line for hours.<br>• Separate 'disability' from 'regular.<br>• Better trained security staff to help direct people to where they need to go and make a more personal connection as your standing in line? Build rapport. (x2)<br>• Limitations for those with literacy issues: both developmental and cognitive issues.<br>• No control. Feels punitive because have to go in to the "Principals" Office and sometimes don't know why. The result is anxiety, etc.<br>• Frontline staff need to be able to make a decision vs. having to defer to someone else e.g., PWD and children need help faster "emergencies" (*This comment is about speed of the decision*) (x2)<br>• Emergency service facility e.g., broken foot took 3 months to get paperwork/decision.<br>• Damage deposit can take 5 days means that we can lose the place in that time: cheque to landlord?<br>• Workers can be difficult sometimes e.g., "bit my head off"<br>  o burned out staff<br>  o no authority<br>  o not "people people" (x5)<br>• Case worker approach was better: ended years ago.<br>• Set up in Richards St. office has changed 4 times in 5 years.<br>  o Now have to set up an appointment to get privacy with a worker in a booth<br>  o Face to face access decreased by 50%<br>  o Privacy face to face decreased 100%<br>  o Lunch time decrease by 1 hour a day.<br>• Have to repeat our problem multiple times to different people<br>• A simple task like picking up a cheque takes several minutes to read the whole file; long-waits:<br>  o Affects privacy and dignity<br>  o Does every worker need to know my file/history? (x6)<br>• If outreach can give good service and get me off the street why can't office?<br>• ACT Team: People get access to allowances we (people not on disability) don't: seems unfair.<br>• We get lied to about what Wesley House was all about:<br>  o Told it was low income housing<br>  o Turned out to be a "jail"<br>• Unless we ask for the eligibility book, we don't get it.<br>• People not aware of availability of advocates |



berlin eaton

| Works Well | Needs Improvement |
|---|---|
| | • Crisis Grants: Ask for Crisis Grant, get a Thrifty's voucher; staff act like it's money out of their own pocket.<br>• No option to speak to supervisor/appeal to higher. This was a privacy issue because he didn't want to speak about his concern in front of others.<br>• Should have full disclosure for PWD and what is eligible/available. Don't have a clue; find out by accident.<br>• Focus on improving face to face vs. developing other channels, especially online because no computer and will never use it.<br>• Not a lot of information available on what's available inside: disconnects:<br>  o No info on what entitled to, lack of education<br>• Lack of privacy when discussing needs at front desk. No option for a private discussion. Front desk staff not qualified. It's a fight to get to the right worker.<br>• Provide a drop-off facility so we don't have to line up<br>• Not sure where to go in office: no direction<br>• Connecting with the wrong people at first PoC: secretary vs. social worker<br>• Ministry office understaffed<br>• Hide and seek: if you don't know the right question, you won't get the right answer (service?), or can be excluded from service<br>• Too confusing to get pain medication covered<br>• KISS (simple) websites for covering eligibility<br>• Continuous service vs lunch break<br>• Use a triage approach: simple vs. complex<br>• Inconsistent interpretation of legislation *(inexperience or ?)*<br>• Doctors have challenges navigating eligibility<br>• Non-medical person seems to be overruling medical decisions based on what can be covered<br>• Understaffed = long waits **(x6)**<br>• Can only talk to someone one-on-one between 9 and 12.00pm *(at a particular office in Region 4)*<br>• Single parents with kids should be priority in office.<br>• Dental: dentists' receptionist knew more about eligibility than MSD person<br>• People skills: stress management for MSD staff<br>• Make a place for kids to play in the office. Keep them occupied. Reduce stress for everyone. Like the food bank has.<br>• Make more forms available in the office. *(On brochure rack or similar)* **(x2)** |

| Works Well | Needs Improvement |
|---|---|
| | • Caseload approach is best.<br>• Downstairs services are less personable<br>• Downstairs not as nice (walked away crying)<br>• Only go in if I have to (last resort) – try to avoid it.<br>• First experience was awful – inappropriate comments – got denied incorrectly and felt offended. Second appointment was great – more professional (different worker).<br>• Eliminate phone call completely and make appointment at the office (for application process)<br>• More triaging would help<br>• Didn't know about the benefits entitled to<br>• Wish they informed us more about what's available<br>• Preferred when had regional offices – transportation is expensive; don't have bus pass (x2)<br>• Worker didn't explain needed more documents and got letter later that scared client; communication (x2)<br>• Hard to disclose literacy issues in person – need to know about advocates like T.A.P.S.<br>• Not sure how much discretion workers have – would like to know (x3)<br>• Want an internal ombudsperson<br>• B.A. turned down because too old; not sure why, worker error or discretion? Power discrepancy makes it hard/sensitive<br>• Rude, unacceptable behaviour from staff<br>• Some issues, the word of clients against the word of worker. Power imbalance<br>• Don't know what to ask or expect<br>• Itemized breakdown of what's on cheque, don't ask don't tell<br>• Counters don't work for people in a wheel chair – even at the lowest level not see over; disability awareness (x3)<br>• Wickets are sending the wrong message<br>• Impatient service on one day but patient service the next day.<br>• Seeing different people, have to tell story multiple times,<br>• Trusting the caregivers coming in with the client – something on the file. |



berlin eaton

**Telephone**

| Works Well | Needs Improvement |
|---|---|
| • Some workers are good at working with advocates; they keep notes. (x2)<br>• I phoned once and got help right away; good service (x5)<br>• More polite workers, no queue pressures, positive experience. (x3)<br>• Being able to call Monday before cheque issue to find out if I need to go in on Wednesday<br>• Phone PID Card# is good, all automated<br>• Easy for the dentist to access approvals for dental work via phone.<br>• There's a call back option; saves time (x3)<br>• 1-800 gives me an option to connect with a local office.<br>• I prefer to phone vs. going into the office.<br>• Medical processes. Jumping thru hours to get orthotics, took months. In general, the medial process is very complex and difficult to navigate.<br>• When you get a direct line, it's good; things get solved<br>• Extremely professional and expedited care- (Dedicated case worker and disability claim) (x2)<br>• Dedicated Case worker was great<br>• I find it easy. Entered info, got a call within ½ hour. Went in to meet worker and managed the disability eligibility process with them<br>• Most convenient and essential when not able to in person. | • Hard to get through, no/call backs if you don't have a phone it's a problems<br>• Phone: hard to reach to a worker; get the run around sometimes, lack of info (x2)<br>• Been on a list with BC Housing since 2004. No calls<br>• Being disconnected after waiting: 1.5 hours and have to call back. (x8)<br>• Need faster service<br>• Pay and talk: wait = waste of $ because of cell phone charges (x6)<br>• Assume everyone has a phone and it's a landline<br>• Landline or cell? Cell is usually preferred.<br>• Don't get my local office sometimes, Kelowna vs PG, cell phone gets rerouted.<br>• Haven't been able to get direct deposit; Should send reminders via mail annually that direct deposit is an option (x2)<br>• Limitations for those with literacy issues: both developmental and cognitive issues.<br>• Bus pass is cheaper than airtime so prefer face to face. (x2)<br>• Staff do not have enough knowledge to manage processes.<br>• Multiple phone calls and inconsistent messages from different people re: eligibility for orthotics.<br>• No replies from staff; inconsistent service (x3)<br>• No feedback from staff on particular issues (x2)<br>• After a discussion and waiting, still have to go to the office<br>• Could redirect funds, for phone to computer access<br>• They don't call back when you use the call back option.<br>• Message tree is long and confusing. Needs to be simpler (x7)<br>• It's obsolete<br>• I call locally from my cell phone and get the US. High phone bills. 1-866-866-0800 (x2)<br>• I cannot reach my office directly, only a 1-866#. I get info. too late about surgery, couldn't even call back directly for more info. should be local vs. out of town people handling calls.<br>• Not available on weekends or after 4pm.<br>• Waiting for a phone call is the biggest problem (could take up to three weeks; missed the call; next call is two weeks later)<br>• Don't have a phone – the first thing to go when having financial challenges<br>• Silly to get a call to arrange for a call |

| Works Well | Needs Improvement |
|---|---|
| | • Would like an option to make/get an appointment for a call<br>• Don't answer phone calls if they don't recognize the number (no caller ID given)<br>• Would be good to have a nice voice on the other end **(x2)**<br>• Don't use the phone often<br>• Would like an option to be able to call collect<br>• Missed a month of cheques because of missed calls<br>• Lottery system – roll of the dice in terms of who is on the end – good or bad client service; Professionalism **(x3)**<br>• Some clients are afraid to call workers<br>• No options for non-verbal clients<br>• Need training on client service with clients who are "Wal-Mart" – compassion is the most important thing<br>• Bad reception – hard to hear, if person has "hard of hearing – can be nightmare over phone<br>• Need skills w/ disability awareness and key questions to identify so clients aren't struggling * family/ friend / advocate/ caregiver phoning on behalf – be understanding<br>• On file re: should record someone phoning on clients behalf<br>• No ability to talk to a person – only fax and email<br>• Frustration – by 3rd person, you aren't at your best either<br>• Leaves a message to call ministry – so long to get through **(x2)**<br>• Distance, mobility can be an issue.**(x2)** |



berlin eaton

Email

| Works Well | Needs Improvement |
|---|---|
| • Good for asking for information where it's not appropriate to call a worker: e.g., those that have power of attorney can get information<br>• Timely and very useful when needed (requires computer skills)<br>• With John Howard, I get instant response (e.g., same day). | • No idea this was available<br>• Not secure or confidential (x3)<br>• Depends on personal computer set ups and Firewall, etc.<br>• Can be used to side step other channels<br>• Impersonal<br>• Limitations for those with literacy issues: both developmental and cognitive issues.<br>• No timeline or certainty of response<br>• Would like to be able to use it – would be more efficient (x2)<br>• Why can't we mail (email information? E-signature?)<br>• Email clerical error at MSD caused me to lose money and have to go into the office. |

Fax

| Works Well | Needs Improvement |
|---|---|
| • Works well when forms need to be sent in eliminates line-ups and energy especially for PWD<br>• Sent in BC Housing application and worked OK<br>  o Doctor's supplement<br>  o PWD application worked OK<br>• Get quick response when faxed (x2)<br>• Can access advocacy centers and GT Hiring<br>• Like email, fax because it is concrete and can re-read it. | • Need access to a fax personally or via agency (x2)<br>• Costs money (x2)<br>• Worry about things getting lost; mixed up (x6)<br>• Running around with confidential papers = risky (x2)<br>• Limitations for those with literacy issues: both developmental and cognitive issues.<br>• Not timely; in a pile until they get to it (x3)<br>• Need a faxed acknowledgement (x2)<br>• Not so handy for clients; Not convenient if can't acknowledge receipt, etc. Still have to use phone, etc. to confirm (x2)<br>• Never used. |

Mail

| Works Well | Needs Improvement |
|---|---|
| • Get a physical document<br>• Helps keep files<br>• Useful, can be informative (x2)<br>• Paper trail good and bad.<br>• Can communicate via bulletins on cheque stubs<br>• Use for the bus pass<br>• Cheque stub comes monthly (on-time letters too) (x3) | • If stubs aren't stamped by workers, they aren't accepted. Sometimes get lost<br>• Not effective, things get lost and costs money (x3)<br>• Always go back to fax or drop off<br>• Should use mail for regular reminders about various items, e.g., Provincial ID Cards<br>• Should mail out transition information before milestones<br>• Can communicate via bulletins on cheque stubs but not timely (x2)<br>• Limitations for those with literacy issues: both developmental and cognitive issues.<br>• Late, not timely (x2)<br>• Needs more transparency on direct deposit – payment fluctuates and don't know why - get monthly stub but no explanation why cheque differs monthly<br>• Told nothing else needed but then got a letter saying documents were outstanding (letter was incorrect, no outstanding docs but increased anxiety when already feeling vulnerable)<br>• Send info with cheque (e.g., tax information)<br>• Stub drop off: something more effective/mail in etc. (x2)<br>• Envelopes, that come in the mail – no confidentiality and results in judgement, shame, etc – example, like bank statements, box #. |

# Client Focus Groups Online Portal Feedback

## General Comments

Nanaimo:

| Benefits | Challenges |
|---|---|
| • Good information about what is available in the community<br>• More personable than the government page.<br>• Ability to fill out forms, online, message board<br>• Avoids conflict that happens with face to face<br>• Good for people who can't get to office | • Promote people not going out the community physically<br>• Some people will need help to use it and won't tend to use it on their own<br>• Some people you never use a computer<br>• Need to make sure it is suitable for old computers that are slow<br>• More computers available |

Surrey:

- What happens if clients can't/don't know how to use a computer? Literacy issues?
- Concerns about privacy and trust will dissuade people from using computers
- Make people aware of where they can access computers for free: e.g., library, recovery houses, etc.
- Have a dedicated computer not subject to the time limits. (library has 1 hour limit)
- Smart phone friendly.
- found online portal to be empowering
    - clients can see their account/payment info (more transparent)
    - can be updated on their case info through their message board and can reply/ask reconnect with ministry worker conveniently as needed
    - can access info (forms, How Tos etc.) without help
- could use portal to post community special events notices
- recommend including crisis and D&A counselling resources under Browse Resources
- difficult to find out what is available for children with special needs or where to go for help/info
- How much of the eligibility review process could be done online?
- Would be great to be able to complete the monthly stub online
- All 12 participants (100%) said they would use the Client Online Portal; some features, only 8/12 said they would use)

Vancouver:

- Recommend scrolling info messages in offices to provide important updates and client messages/updates
- Would be great to be able to complete the monthly stub online

Victoria:

- Don't lose information on current website.
- Consider surveying clients on use of computers
- Need ministry contact information somewhere on the portal
- Make it compatible for Smart phones
- Each page should have links to previous pages

Prince George:
- Likes that all links accessible from any page.
- Caters to "technically" capable people with resources.
- Mental illness prohibits learning/use of computers and computers are cost prohibitive
- Search engine is not good – not user friendly

Kelowna:
- To maintain confidentiality, use a case # *(or similar alternative)*
- Website search gets all BC Govt. There is an alternative option where you can find MSD through online resources
- We should have a system like CRA for requesting PIN # and managing account.
- All Outreach/Advocate centres should be trained to use and pass on skills.

## 1. Launch Page

**Would You Use It?**

- 5/9
- 8 out of 12
- 1/2
- 7/7
- 3/9
- 9/10

**What do you like about it?**

Nanaimo:
- No comments.

Surrey:
- Easy
- No sign in required
- Access from anywhere.

Vancouver:
- Large format screen for various vision needs.
- Calendar scrolling too.

Victoria:
- Information easy to find – big buttons (like the picture)
- Uncluttered
- Visually friendly
- Easier/more comfortable access to a worker
- Nice, neat pack.

PG:
- Layout simple and straight forward
- I would help a client use it (advocate)

Kelowna:
- No waiting in line.
- Convenience
- Confirmation immediately

- Accountability
- Talks to us

**What would make it better?**

Nanaimo:
- Tutorial

Surrey:
- Newsletters: subscribe to a monthly email newsletter.
- Submit stubs online
- Need something about housing
- Link to statutes, policies and procedures (OLR)
- Link to treatment centres

Vancouver:
- Make sure it's legible and use simple language.

Victoria:
- Too many graphics may take long time to load on slower computers
- Functionality more important
- More quick links to resources, especially to resources page; job sources.

PG:
- Does calendar link with Google calendar?
- Voice instructions.
- Can we add a texting capability for mental health clients?
- Can we change font size for those with visual challenges?
- Check colors and contrast for visual impaired.
- Hover text to voice.

Kelowna:
- The ability for people with vision issues to us
- Improve search
- Verbal interface
- Spell check
- Hover cursor with answer
- "You Tube" clip on how to use this portal—orientation for non-computer user

## 2. How to and FAQ's

**Would You Use It?**

- 5/9
- 8 out of 12
- 1/2
- 7/7
- 4/9
- 9/10

**What do you like about it?**

Nanaimo:
- Don't have to wait in line.

- Get infor I need fast
- Both video and audio to overcome reading/hearing issues.

Vancouver:

- Include a specific tutorial for each form. Most people will go to the site for a specific problem
- Include audio tutorial.

Victoria:

- Like the image
- Keep important information upfront
- Simple, uncluttered, user-friendly
- 3/7 would use videos

PG:

- Avoids duplication and likely addresses common questions.

Kelowna:

- It talks to you (audio plus video)
- It's specific to the question you have

**What would make it better?**

Nanaimo:

- Needs voice recognition for those who have a hard time with spelling/reading
- Spell check

Surrey:

- Multi-lingual
- If video, presenter shouldn't have a beard or moustache because of need to be able to read lips.
- Connect with deaf/hard of hearing advisors
- Subtitles for multiple languages.
- Audio and video presenter.

Victoria:

- Videos shouldn't be the only option for key information
- Bigger font

PG:

- Be able to ask a question/let MSD know about a question for FAQ inclusion
- Link FAQ answers to clients' Message Boards.
- Sort as well as search filter: PWD vs. standard services.

Kelowna:

- Fully interactive, such as responding to verbal questions.
- Voice capability

### 3. Browse Resources?

**Would You Use It?**

- 6/9
- 1/2
- 7/7
- 3/9
- 10/10

**What do you like about it?**

Nanaimo
- Good information about resources you might need (e.g., food, work, etc.)

Vancouver:
- Locations for food handouts, clothing and other important info for clients: shelter, women in crisis, etc.
- After hours number.
- Community specific resources such as Coast Foundation.
- Community specific event notices.
- Day to day updates.
- Find out what is available for children with special needs (e.g., Autism, etc.).

Victoria:
- Ability to search based on your current location
- Simple, not cluttered, user-friendly.

PG:
- Geographically sorted.
- Make us aware of services available.

Kelowna:
- Good information to solve our own problems so don't have to ask anyone.

**What would make it better?**

Nanaimo:
- People to help coach through how to use it.
- Tells you your entitlement.
- Hyperlinks to other resources.
- Tailor to specific communities.
- Direction on how to get access to paper resources.
- Connect to other resources and not just social services.

Surrey:
- Issue with postal code defined resource area.
- Enter postal code and get list of services available within the area.
- Include explanations as to how the employment counsellor process works in each area = choice/understanding.

Vancouver:
- Prominent display of emergency numbers.
- Links to other social service resources 211.
- Link to forms with other ministries: e.g., the Residential Tenancy Act.

Victoria:
- Online job resources
- Children resources centers
- Food banks
- Advocate organizations.

PG:
- Must keep it up to date.
- Sorted and filtered info.
- How broadly can you link: doctors, dentists?

- Make sure that resources are localized. Pages should prompt for location.

Kelowna:

- Ensure it remains up to date
- No obsolete information
- Community resources
- Resources available:
  - Food bank
  - Variety Club
  - Low income housing
  - Medical, dental
  - Outreach services

### 4. Find a Form and print it

**Would You Use It?**

- 5/7
- 10/12
- 1/2
- 7/7
- 4/9
- 10/10

**What do you like about it?**

Nanaimo:

- Ability to fill in online.
- Convenient.

Surrey:

- Efficient

Victoria:

- Don't have to go to the office or wait for mail
- Simple to find as compared to current Ministry website
- Free option is good- as opposed to trans. To F2F or using phone.

PG:

- Form number is there.
- Don't have to drill down thru multiple pages.

Kelowna:

- Can submit instantly
- Confirmation
- Keeping track not using multiple forms of paper.

**What would make it better?**

Nanaimo:

- A way to get a hard copy of the form.
- Filling in and submitting online.

Surrey:

- Narration: How to complete a form.

- Visual: pop up form fields.
- Access and submit forms via passworded account vs. fill and print and mail. No signature required and as e.g., Student loans online, Revenue Canada.

Vancouver:

- Pay attention to privacy information.
- How much of the eligibility review can be automated?
- Links to forms with other ministries e.g., Residential Tenancy.

Victoria:

- Printing option challenging – want to save on computer

PG:

- Filters: 1) PWD; 2) Available to work
- Searches or filter system for forms to take in what you are looking for.
- All forms available, even if only to view.
- Tell us this form is not printable and go into office.

Kelowna:

- Spell check capability for filling in
- Good instructions on how to complete

### 5. Find an office

**Would You Use It?**

- 7/7
- 12/12
- 1/2
- 7/7
- 4/9
- If info for local #s (directly to an office) then 8/10. If not, then 1/10

**What do you like about it?**

Nanaimo:

- Easy to locate an office.
- Time savings.

Surrey:

- Accessibility
- Graphics (picture of the office)

PG:

- Saves a trip to the office.
- Keeps us informed.
- Allows personalization.
- Convenient, all info at hand.
- Allow disambiguation of office visits.

Kelowna:

- Know actual locations and contact info.
- Helpful for first time users who don't know locations.

**What would make it better?**

Nanaimo:
- Map for how to get there (like a smart phone)

Surrey:
- Best office not necessarily closest one within the 'postal code' area.

Victoria:
- Integration with Google maps
- Good if you are new or move

PG:
- Be able to provide services from any office in the Province.
- Knowing which is local office in larger regions.

Kelowna:
- Find the local office "closest" to me: need the right (specific) contact info.
- Phone number with actual local office and not the 1-866#
- Won't use it if it doesn't have this info.

### 6. Your Account

**Would You Use It?**

- 7/7
- 12/12
- 1/2
- 7/7
- 4/9
- 8/10

**What do you like about it?**

Nanaimo:
- Personal
- Ease of use
- Time saving

Surrey:
- Can see the history
- Click of a button.
- I am included in the process.
- More empowered and informed and more in control. Reduce anxiety and fear.
- Trust infor more as I am entering it.
- 24/7 access.

Vancouver:
- Links with Family Maintenance.
- Cheque balance/history.

Victoria:
- Has got your information
- Critical to the value of the portal
- Easy to navigate
- Calendar option is good

- Like layout – quick links on bottom.

PG:

- Saves a trip to the office.
- Keeps us informed.
- Allows personalization.
- Convenient, all info at hand.
- Allow disambiguation of office visits.

Kelowna:

- Full disclosure of all information
- Easy to change personal info if required
- Secure info.

**What would make it better?**

Nanaimo:

- Being able to divide your cheque
- Link from MSD to your cheques

Surrey:

- Include reminders to submit items. Lots of advanced note.
- We should have an app for this.
- Security? How good will it be? Feelings of vulnerability.
- Who has access to my account? How much will be available to whom? Access can be limited based on job functions.

Vancouver:

- Could email be used for general notices?
- Combination alerts one email to check message board.

PG:

- Make sure there are calendar reminders about entering account information (e.g., connect to a calendar.)

Kelowna:

- Continue to update security approvals
- Update automatically based on my file

### 7. Message Board

**Would You Use It?**

- 7/7
- 12/12
- 1/2
- 7/7
- 3/9
- 8/10

**What do you like about it?**

Nanaimo:

- Online chat
- Messages in private

- Can be sent to phone
- Auto – notification text/phone Yahoo

Surrey:

- Readability
- Self-explanatory
- Links to reschedule appointment on my own—available time slots.
- Takes away the delays around "Please leave a message."

Vancouver:

- Yes, particularly alerts for messages.

Victoria:

- Easy, straight-forward
- Something you can manage yourself
- Useful
- Good to know if there's a message – the alert.

PG:

- Simple block design without clutter
- Allows secure communication via government server

Kelowna:

- Keeps me informed
- Two-way communications

**What would make it better?**

Nanaimo:

- No suggestions offered.

Surrey:

- Will it help save $ to apply to more benefits? Or will it cost money and hurt our benefits?
- Don't have it windows based, make sure windows aren't open elsewhere when doing work – auto-log out/close.
- Timer and shuts page after a specific time.

Victoria:

- Can I ask a question through this page? Is there a link?
- Worried about accidental "X" hitting – have a "are you sure?" pop up
- Want to know how fast the response will be.

PG:

- Can we reply?
- A reply feature, especially if an error has been made.
- Tie in to calendar.
- Connect to cell phone/Google calendar.

Kelowna:

- Link to your email or phone so we know when to check it.

### 8. Submit a document

**Would You Use It?**

- 5/7

- 6/12
- 1/2
- 7/7
- 3/9
- 9/10

**What do you like about it?**

Nanaimo:
- Much simpler
- Time savings

Surrey:
- I would fill out the document online but have some concerns about submitting it online.
- I would use it as long as I am certain of how long it will take for me to get an answer.

Victoria:
- Potential to save time/cost
- Convenient – accessible anytime.

PG:
- Good to be able to bypass office for simple tasks.
- Browse document history.
- Use for annualized income reporting.

Kelowna:
- Get confirmation that you submitted it.
- Faster, easier than lining up.
- Wouldn't be able to lose document *(like paper copies currently get 'lost')*.

**What would make it better?**

Nanaimo:
- Might need to scan documents and this can be difficult for us.
- If it could be filled out on PDF and instantly submitted
- Use a PIN vs. signature for document submitting on line.

Surrey:
- What happens if it is not filled in correctly? How will people know they have done it right?
- Provide a summary at the end to show everything is OK before submitting or correct it.
- Have a copy of form printed when I submit.
- External kiosk.
- If there is a delay, let me know why. Is there something I can do? Office delay? We want a clear service commitment after "send."

Vancouver:
- Cheque stub submission.

Victoria:
- Make it (Form Page) writeable and put in save feature.

PG:
- Need a good computer—potential financial constraint.
- It will help me with my monthly reporting
- Look at EI reporting requirements for example
- Need higher levels of computer skills

- File Formats? PDF, Images?

Kelowna:

- When document is received by MSD, auto-notify message board to let me know.

### 9. Ask a question online

**Would You Use It?**

- 4/7
- 1/2
- 7/7
- 5/9
- 10/10

**What do you like about it?**

Nanaimo:

- Don't have to go in or use a phone.
- Clear answers.
- Ask other questions for clarifications

Victoria:

- Important to have

PG:

- Saves time, having to go into office
- Faster response

Kelowna:

- The ability to ask anytime
- A single answer
- More specific questions can be asked

**What would make it better?**

Nanaimo:

- A fast response
- Need to be notified that the question has been received and will be responded to by "X" date.

Vancouver:

- Computers available in office waiting rooms to access online portal.

Victoria:

- Make sure its secure coming and going
- Find a way to differentiate between sensitive questions and general ones
- Want to know how quick we can expect a response
- Ensure response times comparable to in person and phone
- Might be confusing between this page and message board – make difference clear

PG:

- Ask for someone to call me—incoming call minutes are free.
- Should be tied to every page so we can ask at any point.
- Live chat? Live help?

Kelowna:

- Need to attach a service standard to a response *(5 days is noted as standard and acceptable)*

- Avoid losing questions
- No delays in response
- Be able to pre-categorize questions to identify urgency of response – right person.

| | Number of clients attempted to contact | Total | Number of clients actually connected with | Total |
|---|---|---|---|---|
| **Region 1 (Victoria)** | • 161 - Total Phone numbers called (i.e., wrong number, voicemail, no answer, not home, number not in service, answering services)<br>o 14 Confirmed<br>o 19 – Spoke too and client not interested or not available (i.e., not available on the day, has doctor or other conflicting appointments, not comfortable in group setting or just not interested) | 161 | • 33 clients (includes the 14 confirmed clients and the 19 not interested)<br>• Did not leave any voice messages | 33 |
| **Region 1 (Nanaimo)** | I contacted approx 20. An EAW assisting contacted about the same. I also contacted at least 5 advocate agencies | 20 | I connected with maybe 8-10. EAW connected with them all | 9 |
| **Region 2 (Vanc #1)** | 94 calls made, which took 3 days to do so , to get 15 to volunteer to attend | 94 | All 94 less the few where phones were no longer in service. | 94 |
| **Region 2 (Vanc #2)** | • 187- Total Phone numbers called (i.e., wrong number, voicemail, no answer, , not home, number not in service, answering services)<br>• 16 'confirmed' (of which 6 showed - 3 from contact centre but all no shows, 10 from advocates of which 7 showed)<br>• 26 – Spoke too and client not interested or not available (i.e., not available on the day, has doctor or other conflicting appointments, not comfortable in group setting or just not interested) | 187 | • 40 clients (includes the 16 confirmed clients and the 26 not interested)<br>• Did not leave any voice messages | 40 |

| | | | | |
|---|---|---|---|---|
| **Region 3 (Surrey)** | Estimated 170 | 170 | Estimated 75 | 75 |
| **Region 4 (Kelowna)** | No data | | No data | |
| **Region 5 (Prince George)** | Approximately 50 | 50 | Spoke to 25, left 3 messages that were not returned | 25 |
| | | **Total number of clients attempted to contact 682** | | **Total number of clients actually connected with 276** |

| Main challenges in connecting | Number of clients 'confirmed' | Total | Number actually attended the session | Key learning and observations from process |
|---|---|---|---|---|
| • Wrong numbers<br>• A lot of the phone number, I think were pay as you go cell numbers<br>• Ability to leave voice mail<br>• Numbers has disconnected<br>• Got voicemail | 14 confirmed | 14 | 9 | • I think in the future, we should have the folks on phone with clients, have an option to do a survey over the phone or offer to mail client survey that they could fill out if they aren't available to come to the session<br>• For the folks who do have computers, it would of been nice to be able to direct them online so they can learn more about the channel strategy and provide feedback online |
| Phone numbers on file not in service or incorrect number | 17 confirmed | 17 | 14 | For me the main obstacle was using telephone numbers listed on file as so many were not correct. |
| Getting clt's at home, left lots of messages of which the majority of people rtned my call, but declined to attend | 16 confirmed | 16 | 2 | Clt's were very hesitant and didn't want anything to do with MSD, others thought it was a good idea but not interested in coming due to various reasons ( medical appt conflicting , liked things just the way they are, daycare, several seniors turning 65 very soon, and come MH issues. Several phone no longer in service |
| See comments in region 1 | • 16 confirmed<br>• 27 were confirmed, then got 3 calls to cancel | 16 | 14 | See comments in region 1 |

| | | | | | |
|---|---|---|---|---|---|
| Clients not available during the day | 20 confirmed | 20 | 12 | Most clients were really hesitant about the process, and whether or not it would affect their IA eligibility, trying to assure them was difficult. Going forward, if we were to try again, I think approaching clients directly at the office would be more effective, it is very easy to say no over the phone, **in person you could explain the process,** and face to face contact is always better. | |
| No data | No data | | 11 | No data | |
| Cell phone numbers on file not in service | 18 confirmed | 18 | 9 | At Prince George our group tended to be older, and all had PWD status. We did not have any employable category clients make it to the session. So next time, **random lists could be refined more,** separating categories, to ensure a better balance is received. For example, lists for the postal code area could be separated into PWDs, and employables which may assist future groups in being more representative of the area's population. | |
| | | **Total number of clients 'confirmed'** | **Total number actually attended the session** | **Note general themes as identified in bold font** | |
| | | **101** | **71** | | |

## Channel Strategy - Client Focus Groups Project

### Steering Committee Meeting

**January 22, 2013**

**Purpose:** The purpose of this meeting is to form our Steering Committee for this project, confirm the project charter and prepare for the client focus groups.

**Location:** MSD R 8th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet/ Janis
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 9:30am | Introductions, and restate the purpose of this project | Janice and Terri |
| 9:45am | Review the project charter: goals, objectives, scope, dates, locations, key messages, and roles and responsibilities | Facilitated |
| 10:10am | Review the draft agenda for the focus groups | Facilitated |
| 10:20am | Finalize administrative requirements | Facilitated |
| 10:40am | Summarize actions and next steps | Facilitated |
| by 11:00am | Adjourn | All |

**Key deliverables from this meeting:**

- Clear roles, responsibilities and timelines
- Identify dates and CRSQs securing of venues
- Client Focus Group session agenda
- Next Steps (documents for approval and preparations, etc.)



berlin eaton

## Summary of Actions and Next Steps

| # | Actions | Who | By When |
|---|---|---|---|
| 1 | Follow-up with Ian to determine location for Region 5 | Terri | Done *(Prince George)* |
| 2 | Finalize schedule and budget | Berlin Eaton and Terri | Jan. 25th |
| 3 | Finalize focus group agenda | Berlin Eaton and Terri | Jan. 25th |
| 4 | Work with Rob Bruce to develop a list of focus group participants. *Note: keep health and safety alerts out & consider proximity/travel to venue | Terri Archer | Feb. 1 |
| 5 | Select and book venues and catering | Pardip and CRSQs | Feb. 1 |
| 6 | Create phone script for regional callers | Terri and Darcy | Feb. 1 |
| 7 | Determine approach to client out of pocket expenses | Pardip and CRSQs | Feb. 1 |
| 8 | Finalize phone lists for Regions 2 & 3 sessions | Terri, Jean and Trent | Feb. 1 |
| 9 | Determine the extent of Colleen's and Terri's participation in focus groups | Terri and Colleen | Feb. 8 |
| 10 | Complete online portal presentation for focus groups | Colleen | Feb. 8 |
| 11 | Contact focus group participants | Region 2 and 3 CRSQs<br>Region 4 and 5 CRSQs<br>Region 1 CRSQ | Feb. 4-8<br>Feb. 12-15<br>Mar. 4 |

## Needs from today's meeting

- #'s, demographics, by community. *(target 15 participant confirmations with range of client demographics with consideration to proximity to venue and/or ease of getting to location)*
- How do we get people there? *(reimburse travel, provide food, consider accessibility and child care opportunities, reminder phone call)*
- Who will contact clients and how will they be identified? *(CRSQs or their regional delegate will contact the client/participant using a script. Client list will be provided through HQ, generated through Research Branch)*

## The Focus Groups Sessions

- Add an ice breaker to help participants feel comfortable.
- Explain privacy expectations

- Sessions will be 3 to 3.5 hours to allow time for engagement *(Target timeframe is approx. 10am-2pm)*
- Suggestion: Give participants some sort of formal "thank you" after the session. *(Letter from ADM and/or certificate of participation)*
- 12 participants per focus group is the goal
- Food and beverages will be included
- Out of pocket expenses will be covered.
    - Region can cover transit tickets.
    - Child care expenses need to be considered.
    - Interpretation services could be made available if necessary. *(Requires approx. 5 days notice)*

**Who are we choosing for the focus groups and how will we choose them?**

- Demographics:
    - Broad demographics overall
    - Clustered to allow for demographic specific feedback *(Where high population identified in specific region, otherwise combined and accommodated within group session)*
    - Both long-term and new clients
- Combination of groups: e.g., (PWD and telephony), single males, ESL.
    - Try to marry channel with demographics.
- Plan call-backs to follow up with participants. *(Voluntary process for participants)*

**Cautions:**

- Use plain language
- Be aware of privacy issues
- We need to manage expectations:
    - Be clear about the purpose of the workshops, what is already built and what isn't.

**Recruitment:**

- Rob Bruce's client/participant lists
- Ask advocacy agents for participants.
- Will contact people by phone ahead of time and make sure they understand what they're agreeing to.
- Follow-up the day before to recruit.
- Don't do mail outs – contact participants by phone (or face-to-face in office if necessary)
- Recruit 15, looking for 12.
- CRSQs to contact participants and help manage supports.
    - CRSQs may delegate contacting of clients.
    - CRSQs (or non-frontline delegate) to attend session
- Terri to work with Rob Bruce to develop the list of participants.
- Venue and food costs are being organized and paid for here in Victoria (through HQ)/Pardip.
- Look at reimbursement for out of pocket expenses: Pardip.
- Provincial language services – fine up support required.
    - Need to know approximately a week in advance what the needs are.
    - Note that the individual contacting the participant might need an interpreter.

- If participants want to talk to us over the phone rather than in a focus group, Berlin Eaton would be happy to call them.

### Locations and Facilities

- Richard recommends a 1,200 sq. ft. room, not in the ministry but wheelchair accessible and near transit.
  - CRSQs to work with Pardip to make the arrangements and payments.
- Area/Community for client sessions:
  - Region 1: Nanaimo as the location but willing to pay transport from other cities.
  - Region 2: Library Square area
  - Region 3: Surrey/Mt. Newton: rec centre and libraries maybe.
  - Region 4: Kelowna
  - Region 5: Prince George

### Questions

- Attendees from the ministry:
  - Terri Archer
  - CSRQ (or non-frontline delegate if CRSQ unavailable)
- Online portal demo
  - Introduce the portal
  - Show video in segments (approx. 5 min. each) and get feedback after each segment
  - Choose 4 or 5 clips
  - Collect questions
  - What appeals?
  - Barriers to use?
  - Other ideas?

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Friday, March 22, 2013 3:46 PM |
| **To:** | Lofthouse, Jean C MSD:EX; Walker, Darleen MSD:EX; Soder, Denise MSD:EX; Brown, Trent D MSD:EX; Ruel, Janis M MSD:EX; Harrower, Ian MSD:EX; Bousquet, Jeannine M MSD:EX; Bandechha, Pardip MSD:EX; Hare, Kashmir K MSD:EX |
| **Cc:** | D'Gal, Judy MSD:EX; Houston, Darcy L MSD:EX |
| **Subject:** | Client Focus Group Reporting Info |

Hello all, as the client sessions wrap up (the last planned session is on Monday which will complete the run of 7 sessions total), I am just trying to collect all the data for the final reports.

I want to start off by applauding all of you for your time, effort and commitment to the Channel Strategy project. Consulting with clients directly has its challenges to say the least but we were able to connect directly with approximately 60 clients so far with one more session to go. In addition, we informed what's likely to equate to a few hundred clients that we are interested in feedback on our service channels. That's where I'm hoping you can provide me some further information based on your direct experience in rallying clients for your regional focus group.

For those of you directly involved in contacting clients, including consulting advocacy or equivalent organizations for focus group participants, I would appreciate responses to the following questions so I can include the information in my reporting as part of our Lessons Learned. Thank you. Also, if I have missed anyone directly involved, please let me know.

Please note that in the interest of not consuming more time than necessary to get this information, your best guess/close is sufficient. I will preface my reporting on this as anecdotal and 'approximately...'

- How many clients did you attempt to contact?
- How many clients did you actually connect with? (Please separate if direct contact was made or message left)
- Main challenge in being able to connect with clients
- How many clients 'confirmed'. (We already know how many actually attended)
- Any other key learning or observations made during this process?

Thank you all once again for your time and dedication. The client sessions and direct feedback obtained through them would not have been possible without the engagement of great colleagues like you! I look forward to reporting out to you in the near future.

Finally, in the interest of protection of privacy re: client info, please remember to delete any/all client-specific info with regard to this project, particularly emails (includes all folders, Inbox, Sent, Deleted, etc.). I have retained anything needed for the project.

Cheers,

Terri Archer
Senior Project Manager, Stakeholder Relations Regional Operations, MSD
Ph: (250) 356-6718

"It won't be the ability to fiercely compete but the ability to lovingly cooperate that will determine success" (Kouzes and Posner, 2002)

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Nakamura, Janice N. MSD:EX |
| **Sent:** | Monday, February 4, 2013 5:52 PM |
| **To:** | Archer, Terri MSD:EX; D'Gal, Judy MSD:EX; Anholt, Jennifer A MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Harrower, Ian MSD:EX; Lauzon, Michele MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX; Houston, Darcy L MSD:EX |
| **Cc:** | Turner, Colleen P MSD:EX; Hare, Kashmir K MSD:EX; Seder, Denise MSD:EX; Walker, Darleen MSD:EX |
| **Subject:** | RE: Steering Committee Mtg Summary |

Wow – thanks for the summary, Terri. That's great! Thanks to you and the whole team, for your contributions to date (and tons coming in the future!) This is really exciting!!!

Janice

Janice Nakamura
Executive Director
Regional Operations Branch
Ministry of Social Development
Ph: (250) 356-2220

---

**From:** Archer, Terri MSD:EX
**Sent:** Monday, February 4, 2013 5:11 PM
**To:** D'Gal, Judy MSD:EX; Anholt, Jennifer A MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Harrower, Ian MSD:EX; Lauzon, Michele MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX; Nakamura, Janice N. MSD:EX; Houston, Darcy L MSD:EX
**Cc:** Turner, Colleen P MSD:EX; Hare, Kashmir K MSD:EX; Seder, Denise MSD:EX; Walker, Darleen MSD:EX
**Subject:** Steering Committee Mtg Summary

Hello all, attached is the detailed meeting summary from our last Steering Committee meeting.

<< File: Steering Comm Mtg Notes (Jan 30 2013).docx >>

As an additional status update on the project:

- *(Thanks to Pardip...)* **Venues** are all booked and catering is in progress.
- The **Project Charter** has been updated and sent to Judy and Janice for their approval. Then onward to the other signoffs (GCPE, Rob Bruce, and the contractors).
- The first two **Participant Lists** have been run by the Research Branch and are in Darcy's possession for distribution with the Script
- The **Script** was submitted for review/feedback due by end of day today for distribution with the lists tomorrow morning

- *(Thanks to Darcy...)* PIA complete and Judy signed off, now onto the STRA (more technical/systems assessment completed mostly by Diane Bessey)

First client sessions are just around the corner (next week)!

We are in good shape and have come a long way in a short amount of time. Great work everyone!

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Monday, February 4, 2013 5:11 PM |
| **To:** | D'Gal, Judy MSD:EX; Anholt, Jennifer A MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Harrower, Ian MSD:EX; Lauzon, Michele MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX; Nakamura, Janice N. MSD:EX; Houston, Darcy L MSD:EX |
| **Cc:** | Turner, Colleen P MSD:EX; Hare, Kashmir K MSD:EX; Seder, Denise MSD:EX; Walker, Darleen MSD:EX |
| **Subject:** | Steering Committee Mtg Summary |

Hello all, attached is the detailed meeting summary from our last Steering Committee meeting.

As an additional status update on the project:

- *(Thanks to Pardip...)* **Venues** are all booked and catering is in progress.
- The **Project Charter** has been updated and sent to Judy and Janice for their approval. Then onward to the other signoffs (GCPE, Rob Bruce, and the contractors).
- The first two **Participant Lists** have been run by the Research Branch and are in Darcy's possession for distribution with the Script
- The **Script** was submitted for review/feedback due by end of day today for distribution with the lists **tomorrow morning**
- *(Thanks to Darcy...)* **PIA** complete and Judy signed off, now onto the **STRA** (more technical/systems assessment completed mostly by Diane Bessey)

First client sessions are just around the corner (next week)!

We are in good shape and have come a long way in a short amount of time. Great work everyone!

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

## Channel Strategy - Client Focus Groups Project
### Steering Committee Meeting
**January 30, 2013**

**Purpose:** To check on progress to date with respect to logistics and finalize the focus group agenda and target questions.

**Location:** MSD R 6th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet and Janis
    2. Jean Lofthouse
    3. Trent Brown and Denise Cedar
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 11:00am | Debrief last meeting and confirm meeting expectations and agenda | Facilitated |
| 11.15am | Review progress on Summary of Actions and Next Steps from last meeting, including logistics and dates | Facilitated |
| 11.45am | Confirm target questions for the focus groups [and discuss script for invitation to clients] | Facilitated |
| 12.00pm | Confirm agenda for the focus groups | Facilitated |
| 12.15pm | Summarize actions and next steps | Facilitated |
| by 12.30pm | Adjourn | All |

## Debrief last meeting

- Kickoff meeting went fine/well.
- Just waiting for client list so can get going on contacting people.

## Preparation for Focus Groups

- Client List:
  - Working with Research Branch - should have the lists back for Regions 2&3 by end of day on Friday, Feb. 1st.
  - Using postal codes for proximity to venue. Won't have to worry about alerts (e.g., health and safety, etc.). There are about 8 alerts, and they will NOT be included in the list.
  - What about the clients that don't have a phone? We will stick with the list for Regions 2 and 3. Then assess after the first two sessions to reconsider engaging advocacy groups to ensure broader representation of the caseload.
- Script:
  - Draft in progress for invitation to clients.
  - Need direct ministry contact # in script. (e.g. Darlene Walker offered direct line for Region 2).
  - When calling client, if there are other issues raised by client, refer client to contact ministry separate from the invitation call.
  - Intended to have draft sent out to regional contacts by Wed. afternoon with comments back by end of day Thursday. ***Delayed***, send out late Thursday for feedback by mid-day Friday for those who can meet this timeline and will reassess as needed.
  - Participant list (password protected) and script will be sent out Friday (with separate contact for password info). Script to accompany Participant List.
- Child care: Not in scope for reimbursement of expenses. Will need to request client to manage/arrange.
- Transportation reimbursement will be limited to bus tickets. Pardip will follow-up with each CRSQ to determine best approach for purchase. Option available to reclaim expense through project budget.
- Regional travel for sessions deemed not an issue. Regions will manage (e.g. through business vehicle)

### Region Focus Groups

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 1. Vancouver Island | March 12th<br>10:00am to 2:30pm | City of Nanaimo<br>*Bowen Clubhouse*<br><br>500 Bowen Rd<br>Nanaimo BC V9R 1Z7 | Jeanine or Janis | Jeanine<br>250-739-6600 |
| 2. Vancouver Coastal | Feb. 13, 2013<br>10:30am to 3:00pm | Vancouver Library<br>*Morris J. Wosk Boardroom*<br><br>350 West Georgia St<br>Vancouver BC V6B 6B2 | Darlene Walker's direct line | Jean Lofthouse |



berlin eaton

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 3. Fraser | Feb. 14, 2013<br>10:00am to 2:30pm | Surrey Kwantlen Campus<br>*Cedar Room 2105*<br><br>12666 72nd Avenue<br>Surrey BC V3W 2M8 | Denise Sedar and Trent Brown | Denise |
| 4. Interior | Feb. 26th 2013<br>10:00am to 2:30pm | John Howard Society<br>*Multi Purpose Room*<br><br>1440 St. Paul Street<br>Kelowna BC V1Y 2E6 | Harleen Price | Harleen |
| 5. North | Feb. 28th 2013<br>10:00am to 2:30pm | Prince George Native Friendship Centre<br>*Circle of Unity Room*<br><br>1600 - 3rd Avenue<br>Prince George, BC V2L 3G6 | Ian Harrower | Ian |

*Note: Room should be booked for 1 hour before and after the session so that Richard and Norma can set up, clean up and debrief with Terri and CRSQ.

**Contact Info for Richard and Norma:**

- Richard's Cell: 250-889-1292
- Berlin Eaton Office: 250-472-3767
- Richard's Email: reaton@berlineaton.com
- Norma's email: nglendinning@berlineaton.com
- Berlin Eaton Website: www.berlineaton.com
- http://www.linkedin.com/profile/view?id=16398225&trk=hb_tab_pro_top
- http://www.linkedin.com/profile/view?id=65209796&locale=en_US&trk=tyah

**Key Target Questions**

**Focus:**

We want people to tell us about how they access service, why they choose a particular "service delivery channel", how that channel could be improved, how comfortable they are with using other options, and what would be needed to make newer service delivery channels as efficient and effective as possible.

- How do you prefer to access services and why?
- What challenges, if any, have you had with each service channel?
- What encourages you to get services thru a specific channel?
- Do you access our services electronically now? What would it make things easier for you?
    - Is 24/7 access important to you?
- Do you use community agencies' services to assist in accessing our services?
- How can we improve upon our service channels?

**Focus Group Agenda**

- Richard provided an overview of the proposed standard agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 10:00am | Welcome and introductions | MSD Staff |
| 10:15am | Opening activities | Berlin Eaton |
| 10:30am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement | Berlin Eaton |
| 11:30am | Review online modules and obtain feedback | Berlin Eaton |
| 12:00pm | *Lunch* | All |
| 12:15pm | Review online modules (continue while people eat) | Berlin Eaton |
| 1:00pm | Design the future:<br>• Map redesigned of service channel processes<br>• Identify recommendations to MSD | Berlin Eaton |
| 2:15pm | Summary of actions and next steps | Berlin Eaton |
| by 2:30pm | Session Ends – Thank you | All |

- Online Portal Demo(s)/videos: *under development – requires IMB to record*
  - 5 or 6 clips with feedback? Is there enough time?
  - We will need to do a rehearsal of some kind before the first session to figure that out
- On arrival: we will have coffee and snacks available for participants. Note possible allergy issues with attendees.



berlin eaton

## Summary of Actions and Next Steps

| | Actions | Who | By When | Status |
|---|---|---|---|---|
| 1 | Follow-up with Ian to determine location for Region 5 | Terri | Done *(Prince George)* | Done *(Prince George)* |
| 2 | Finalize schedule and budget | Berlin Eaton and Terri | Jan. 25th | Near completion Need confirmation from Kelowna |
| 3 | Finalize focus group agenda | Berlin Eaton and Terri | Jan. 25th | Need to complete "plain language version" |
| 4 | Work with Rob Bruce to develop a list of focus group participants. *Note: keep alerts out & consider proximity/travel to venue | Terri Archer | Feb. 1 | Expect to be done by Feb. 1 |
| 5 | Select and book venues and catering | Pardip and CRSQs | Feb. 1 | Expect to be finalized by Feb. 6 |
| 6 | Create phone script for regional callers | Terri and Darcy | Feb. 1 | Draft will be sent out to regional contacts by end of day Thursday, Jan. 31 |
| 7 | Determine approach to client out of pocket expenses | Pardip and CRSQs | Feb. 1 | Expect to finalize by Feb. 6 |
| 8 | Finalize phone lists for all regions (will be password protected) | Terri/Darcy, Jean and Trent | Feb. 1 | In progress |
| 9 | Determine the extent of Colleen's and Terri's participation in focus groups | Terri and Colleen | Feb. 8 | In progress |
| 10 | Complete online portal presentation for focus groups | Colleen | Feb. 8 | In progress |
| 11 | Contact focus group participants | Region 2 and 3 CRSQs<br>Region 4 and 5 CRSQs<br>Region 1 CRSQ | Feb. 4-8<br>Feb. 12-15<br>Mar. 4 | Will start once list is finalized |
| | New Items | | | |



berlin eaton

| # | Actions | Who | By When | Status |
|---|---|---|---|---|
| 12 | Schedule a phone call with regional rep and Terri for a week in advance of session to finalize arrangements | Norma | Feb. 8 | |
| 15 | Need to figure out how to manage clients who want to continue to be involved?<br>o Need a consent form at the session. | Terri | Feb. 8 | |
| 16 | Complete thank you certificates for participants:<br>o Printed names for most<br>o Some blanks at end of each session | Terri | Feb. 8 | |
| 17 | Schedule next Steering Committee Meeting for some time during week of Feb. 18. | Darcy | Feb. 4 | |
| 18 | Berlin Eaton and MSD staff to do a rehearsal (before the first session on Feb 13th) with the video clips we want to get feedback on. It may take too long, and we might need to cut them down to one or two of the most important items. | Terri, Berlin Eaton | No later than Feb 12 | |

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Monday, February 4, 2013 11:35 AM |
| **To:** | Bandechha, Pardip MSD:EX; Houston, Darcy L MSD:EX; D'Gal, Judy MSD:EX; 'Norma Glendinning'; 'Richard Eaton' |
| **Subject:** | FYI: Client Focus Group Status Update |

Just to keep you all in the loop,

- *(Thanks to Sandy S...)* the **contract** has been finalized and has been submitted to Richard Eaton for signoff, and then to Judy.
- *(Thanks to Pardip...)* **Venues** are all booked and catering is in progress.
- The **Project Charter** has been updated and I just sent it to Judy and Janice for their approval. Then onward to the other signoffs (GCPE, Rob Bruce, and the contractors).
- The **Script** has been submitted for review/feedback due by end of day. (All responses are positive with no changes so far).
- The first two **Participant Lists** have been run by Sri (Research Branch) and are in Darcy's possession for distribution with the Script by tomorrow morning.
- *(Thanks to Darcy...)* **PIA** complete and Judy signed off, now onto the **STRA** (more technical/systems assessment completed mostly by Diane Bessey)
- GCPE has been provided a **status update** on all three Engagement streams (client, advocate, and staff)
- **Steering Committee Meeting summary** complete and will be distributed to the group shortly

We're in good shape. Thank you all!

I can't believe the first sessions are next week!

Cheers,

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Norma Glendinning <NGlendinning@berlineaton.com> |
| **Sent:** | Thursday, January 31, 2013 10:53 AM |
| **To:** | Archer, Terri MSD:EX |
| **Cc:** | Bandechha, Pardip MSD:EX; Houston, Darcy L MSD:EX; Richard Eaton |
| **Subject:** | Notes from yesterday |
| **Attachments:** | Steering Comm Mtg Notes (Jan 30 2013).docx |

Hi Terri,

I've attached the notes from yesterday's Steering Committee meeting. As usual, we'd be happy to make any changes you'd like to see.

Best regards,
Norma

**Norma Glendinning** | Management Consultant

berlin eaton

Suite 401 | 848 Courtney St. | Victoria, BC | V8W 1C4
T 250.472.3767 | F 250.472.3766

LEGAL NOTICE: This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.

## Channel Strategy - Client Focus Groups Project
### Steering Committee Meeting
### January 30, 2013

**Purpose:** To check on progress to date with respect to logistics and finalize the focus group agenda and target questions.

**Location:** MSD R 6th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet and Janis
    2. Jean Lofthouse
    3. Trent Brown and Denise Cedar
    4. Harleen Price
    5. Ian Harrower

## Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 11:00am | Debrief last meeting and confirm meeting expectations and agenda | Facilitated |
| 11.15am | Review progress on Summary of Actions and Next Steps from last meeting, including logistics and dates | Facilitated |
| 11.45am | Confirm target questions for the focus groups | Facilitated |
| 12.00pm | Confirm agenda for the focus groups | Facilitated |
| 12.15pm | Summarize actions and next steps | Facilitated |
| by 12.30pm | Adjourn | All |

## Debrief last meeting

- Meeting went fine.
- Just waiting for client list so can get going on contacting people.

## Preparation for Focus Groups

- Client List:
  - Working with Research Branch. Should have the list back by end of day on Friday, Feb. 1st.
  - Using postal codes. Won't have to worry about alerts (e.g., health and safety, etc.). There are about 8 alerts, and they will be not be included in the list.
  - What about the clients that don't have a phone? We will stick with the list for regions 2 and 3 and then assess and reconsider engaging advocacy groups after that we may have missed.
- Script:
  - Drafting now for clients.
  - Need client contact # in script.
  - Darlene's direct line for Region 2.
  - When calling client, if there are other issues, refer to ministry office.
  - Draft sent out to regional contacts by this afternoon, comments back by end of day Thursday if possible.
  - Participant list (password protected) and script will be sent out Friday.
- Child care: We can't cover it.
- Transportation will be limited to bus tickets. Pardip will follow-up with each CRSQ to determine best approach.
- Regional travel for sessions:
  - No problem.

### Region Focus Groups

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 1. Vancouver Island | March 12th 10.00am to 2.30pm | Nanaimo Bowen Park Clubhouse | Jeanine or Janis | Jeanine 250-739-6600 |
| 2. Vancouver Coastal | Feb. 13, 2013 11.00am to 3.00pm | Vancouver Library | Darlene Walker's direct line | Jean Lofthouse |
| 3. Fraser | Feb. 14, 2013 10.00am to 2.30pm | Surrey Kwantlen Campus | Denise Cedar and Trent Brown | Denise |
| 4. Interior | Feb. 26th 10.00am to 3.30pm | Kelowna Meeting space will be either: John Howard Society or Library | Harleen Price | Harleen |

| Region | Date and Time | Location | Client Contact | Richard and Norma's Contact |
|---|---|---|---|---|
| 5. North | Feb. 26<br>10.00am to 2.30pm | PG Native Friendship Centre (3rd avenue) | Ian Harrower | Ian |

*Note: Room should be booked for 1 hour before and after the session so that Richard and Norma can set up, clean up and debrief with Terri and CRSQ.

**Contact Info for Richard and Norma:**

- Richard's Cell: 250-889-1292
- Berlin Eaton Office: 250-472-3767
- Richard's Email: reaton@berlineaton.com
- Norma's email: nglendinning@berlineaton.com
- Berlin Eaton Website: www.berlineaton.com
- http://www.linkedin.com/profile/view?id=16398225&trk=hb_tab_pro_top
- http://www.linkedin.com/profile/view?id=65209796&locale=en_US&trk=tyah

**Key Target Questions**

- How do you prefer to access services and why?
- What challenges, if any, have you had each channel?
- What encourages you to get services thru a specific channel?
- Do you access our services electronically now? Would it make things easier for you?
- How access now? Online?
- Do you use community agencies' services?
- ~~"How important is 24/7 access...": Need to specify which services. Maybe ask:~~
  - ~~Which channels most important~~ 24/7?: Does it emerge, and if so, how?
- How can we improve our service to you?

**Focus Group Agenda**

- Richard provided an overview of the proposed standard agenda
- Videos:
  - 5 or 6 clips with feedback?
  - Is there enough time?
  - We will need to do a rehearsal of some kind before the first session to figure that out
- On arrival: will have coffee and snacks available. Note possible allergy issues with attendees.

## Summary of Actions and Next Steps

| # | Actions | Who | By When | Status |
|---|---|---|---|---|
| 1 | Follow-up with Ian to determine location for Region 5 | Terri | Done *(Prince George)* | Done *(Prince George)* |
| 2 | Finalize schedule and budget | Berlin Eaton and Terri | Jan. 25th | Near completion<br>Need confirmation from Kelowna |
| 3 | Finalize focus group agenda | Berlin Eaton and Terri | Jan. 25th | Need to complete "plain language version" |
| 4 | Work with Rob Bruce to develop a list of focus group participants.<br>*Note: keep alerts out & consider proximity/travel to venue | Terri Archer | Feb. 1 | Expect to be done by Feb. 1 |
| 5 | Select and book venues and catering | Pardip and CRSQs | Feb. 1 | Expect to be finalized by Feb. 6 |
| 6 | Create phone script for regional callers | Terri and Darcy | Feb. 1 | Draft will be sent out to regional contacts by end of day Thursday, Jan. 31 |
| 7 | Determine approach to client out of pocket expenses | Pardip and CRSQs | Feb. 1 | Expect to finalize by Feb. 6 |
| 8 | Finalize phone lists for all regions (will be password protected) | Terri/Darcy, Jean and Trent | Feb. 1 | In progress |
| 9 | Determine the extent of Colleen's and Terri's participation in focus groups | Terri and Colleen | Feb. 8 | In progress |
| 10 | Complete online portal presentation for focus groups | Colleen | Feb. 8 | In progress |
| 11 | Contact focus group participants | Region 2 and 3 CRSQs<br>Region 4 and 5 CRSQs<br>Region 1 CRSQ | Feb. 4-8<br>Feb. 12-15<br>Mar. 4 | Will start once list is finalized |
| | New Items | | | |



berlin eaton

| # | Actions | Who | By When | Status |
|---|---|---|---|---|
| 12 | Schedule a phone call with regional rep and Terri for a week in advance of session to finalize arrangements. | Norma | Feb. 8 | |
| 15 | Need to figure out how to manage clients who want to continue to be involved?<br>o Need a consent form at the session. | Terri | Feb. 8 | |
| 16 | Complete thank you certificates for participants:<br>o Printed names for most<br>o Some blanks at end of each session | Terri | Feb. 8 | |
| 17 | Schedule next Steering Committee Meeting for some time during week of Feb. 18. | Darcy | Feb. 4 | |
| 18 | Berlin Eaton and MSD staff to do a rehearsal (before the first session on Feb 13th) with the video clips we want to get feedback on. It may take too long, and we might need to cut them down to one or two of the most important items. | Terri, Berlin Eaton | No later than Feb 12 | |

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Wednesday, January 23, 2013 10:02 AM |
| **To:** | D'Gal, Judy MSD:EX; Nakamura, Janice N. MSD:EX; Anholt, Jennifer A MSD:EX; Houston, Darcy L MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Turner, Colleen P MSD:EX; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Harrower, Ian MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX |
| **Subject:** | Client Focus Groups - Kickoff Mtg Summary & Action Items |

Hello all, attached is a summary from yesterday's Steering Committee kickoff meeting (the summary and action items follow the Agenda page).

Pardip has already started connecting with the CRSQs to secure the venues and I am connecting with Rob Bruce (Research Branch) to identify potential participants in Regions 2 & 3.

Please don't hesitate to contact me if you have any questions, concerns or otherwise. Thank you.

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

---

**From:** Archer, Terri MSD:EX
**Sent:** Monday, January 21, 2013 5:24 PM
**To:** D'Gal, Judy MSD:EX; Nakamura, Janice N. MSD:EX; Anholt, Jennifer A MSD:EX; Houston, Darcy L MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Turner, Colleen P MSD:EX; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Hare, Kashmir K MSD:EX; Harrower, Ian MSD:EX; Lauzon, Michele MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX
**Subject:** Client Focus Groups - DRAFT Project Charter & Mtg Agenda

Hi all, here are the documents that we will reference at tomorrow's meeting (so no pre-reading required). These are draft and for your reference for context.

See you tomorrow.

<< File: Steering Comm Mtg Agenda (Jan 22 2013).docx >>

<< File: Project Charter - Client Focus Groups - 17Jan2013.docx >>

## Channel Strategy - Client Focus Groups Project
### Steering Committee Meeting
### January 22, 2013

**Purpose:** The purpose of this meeting is to form our Steering Committee for this project, confirm the project charter and prepare for the client focus groups.

**Location:** MSD R 8th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet/ Janis
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 9:30am | Introductions, and restate the purpose of this project | Janice and Terri |
| 9:45am | Review the project charter: goals, objectives, scope, dates, locations, key messages, and **roles and responsibilities** | Facilitated |
| 10:10am | Review the draft agenda for the focus groups | Facilitated |
| 10:20am | Finalize administrative requirements | Facilitated |
| 10:40am | Summarize actions and next steps | Facilitated |
| by 11:00am | Adjourn | All |

**Key deliverables from this meeting:**

- Clear roles, responsibilities and timelines
- Identify dates and CRSQs securing of venues
- Client Focus Group session agenda
- Next Steps (documents for approval and preparations, etc.)



berlin eaton

## Summary of Actions and Next Steps

| # | Actions | Who | By When |
|---|---|---|---|
| 1 | Follow-up with Ian to determine location for Region 5 | Terri | Done *(Prince George)* |
| 2 | Finalize schedule and budget | Berlin Eaton and Terri | Jan. 25th |
| 3 | Finalize focus group agenda | Berlin Eaton and Terri | Jan. 25th |
| 4 | Work with Rob Bruce to develop a list of focus group participants. *Note: keep health and safety alerts out & consider proximity/travel to venue | Terri Archer | Feb. 1 |
| 5 | Select and book venues and catering | Pardip and CRSQs | Feb. 1 |
| 6 | Create phone script for regional callers | Terri and Darcy | Feb. 1 |
| 7 | Determine approach to client out of pocket expenses | Pardip and CRSQs | Feb. 1 |
| 8 | Finalize phone lists for Regions 2 & 3 sessions | Terri/Darcy, Jean and Trent | Feb. 1 |
| 9 | Determine the extent of Colleen's and Terri's participation in focus groups | Terri and Colleen | Feb. 8 |
| 10 | Complete online portal presentation for focus groups | Colleen | Feb. 8 |
| 11 | Contact focus group participants | Region 2 and 3 CRSQs<br>Region 4 and 5 CRSQs<br>Region 1 CRSQ | Feb. 4-8<br>Feb. 12-15<br>Mar. 4 |

## Needs from today's meeting

- #'s, demographics, by community. *(target 15 participant confirmations with range of client demographics with consideration to proximity to venue and/or ease of getting to location)*
- How do we get people there? *(reimburse travel, provide food, consider accessibility and child care opportunities, reminder phone call)*
- Who will contact clients and how will they be identified? *(CRSQs or their regional delegate will contact the client/participant using a script. Client list will be provided through HQ, generated through Research Branch)*

## The Focus Groups Sessions

- Add an ice breaker to help participants feel comfortable.
- Explain privacy expectations

- Sessions will be 3 to 3.5 hours to allow time for engagement *(Target timeframe is approx. 10am-2pm)*
- Suggestion: Give participants some sort of formal "thank you" after the session. *(Letter from ADM and/or certificate of participation)*
- 12 participants per focus group is the goal
- Food and beverages will be included
- Out of pocket expenses will be covered.
    - Region can cover transit tickets.
    - Child care expenses need to be considered.
    - Interpretation services could be made available if necessary. *(Requires approx. 5 days notice)*

**Who are we choosing for the focus groups and how will we choose them?**

- Demographics:
    - Broad demographics overall
    - Clustered to allow for demographic specific feedback *(Where high population identified in specific region, otherwise combined and accommodated within group session)*
    - Both long-term and new clients
- Combination of groups: e.g., (PWD and telephony), single males, ESL.
    - Try to marry channel with demographics.
- Plan call-backs to follow up with participants. *(Voluntary process for participants)*

**Cautions:**

- Use plain language
- Be aware of privacy issues
- We need to manage expectations:
    - Be clear about the purpose of the workshops, what is already built and what isn't.

**Recruitment:**

- Rob Bruce's client/participant lists
- Ask advocacy agents for participants.
- Will contact people by phone ahead of time and make sure they understand what they're agreeing to.
- Follow-up the day before to recruit.
- Don't do mail outs – contact participants by phone (or face-to-face in office if necessary)
- Recruit 15, looking for 12.
- CRSQs to contact participants and help manage supports.
    - CRSQs may delegate contacting of clients.
    - CRSQs (or non-frontline delegate) to attend session
- Terri to work with Rob Bruce to develop the list of participants.
- Venue and food costs are being organized and paid for here in Victoria (through HQ)/Pardip.
- Look at reimbursement for out of pocket expenses: Pardip.
- Provincial language services – line up support required.
    - Need to know approximately a week in advance what the needs are.
    - Note that the individual contacting the participant might need an interpreter.

- If participants want to talk to us over the phone rather than in a focus group, Berlin Eaton would be happy to call them.

**Locations and Facilities**

- Richard recommends a 1,200 sq. ft. room, not in the ministry but wheelchair accessible and near transit.
  - CRSQs to work with Pardip to make the arrangements and payments.
- Area/Community for client sessions:
  - Region 1: Nanaimo as the location but willing to pay transport from other cities.
  - Region 2: Library Square area
  - Region 3: Surrey/Mt. Newton: rec centre and libraries maybe.
  - Region 4: Kelowna
  - Region 5: Prince George

**Questions**

- Attendees from the ministry:
  - Terri Archer
  - CSRQ (or non-frontline delegate if CRSQ unavailable)
- Online portal demo
  - Introduce the portal
  - Show video in segments (approx. 5 min. each) and get feedback after each segment
  - Choose 4 or 5 clips
  - Collect questions
  - What appeals?
  - Barriers to use?
  - Other ideas?

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Archer, Terri MSD:EX |
| **Sent:** | Monday, January 21, 2013 5:24 PM |
| **To:** | D'Gal, Judy MSD:EX; Nakamura, Janice N. MSD:EX; Anholt, Jennifer A MSD:EX; Houston, Darcy L MSD:EX; Bandechha, Pardip MSD:EX; 'NGlendinning@berlineaton.com'; 'REaton@berlineaton.com'; Turner, Colleen P MSD:EX; Bousquet, Jeannine M MSD:EX; Brown, Trent D MSD:EX; Hare, Kashmir K MSD:EX; Harrower, Ian MSD:EX; Lauzon, Michele MSD:EX; Lofthouse, Jean C MSD:EX; Price, Harleen MSD:EX; Ruel, Janis M MSD:EX |
| **Subject:** | Client Focus Groups - DRAFT Project Charter & Mtg Agenda |

Hi all, here are the documents that we will reference at tomorrow's meeting (so no pre-reading required). These are draft and for your reference for context.

See you tomorrow.

## Channel Strategy - Client Focus Groups Project

### Steering Committee Meeting

**January 22, 2013**

**Purpose:** The purpose of this meeting is to form our Steering Committee for this project, confirm the project charter and prepare for the client focus groups.

**Location:** MSD R 8th Floor 614 Humboldt (plus Live Meeting/Conference call for CRSQs)

**Attendees:**

- Janice Nakamura, Executive Director
- Judy D'Gal, Director
- Terri Archer, Senior Project Manager
- Pardip Bandechha, Policy and Project Analyst
- Darcy Houston, Senior Project Management Officer
- Jennifer Anholt, Channel Strategy Manager
- Colleen Turner, IMB Business Analyst
- Richard Eaton and Norma Glendinning, Berlin Eaton
- Community Relations Service Quality (CRSQ) Managers for each region
    1. Jeannine Bousquet
    2. Jean Lofthouse
    3. Trent Brown
    4. Harleen Price
    5. Ian Harrower

### Agenda

| Time | Agenda Item | Lead |
|---|---|---|
| 9:30am | Introductions, and restate the purpose of this project | Janice and Terri |
| 9:45am | Review the project charter: goals, objectives, scope, dates, locations, key messages, and **roles and responsibilities** | Facilitated |
| 10:10am | Review the draft agenda for the focus groups | Facilitated |
| 10:20am | Finalize administrative requirements | Facilitated |
| 10:40am | Summarize actions and next steps | Facilitated |
| by 11:00am | Adjourn | All |



berlin eaton

BRITISH COLUMBIA

Ministry of Social Development

# Project Charter

Channel Strategy
Client Focus Groups

| | |
|---|---|
| **Authors:** | Darcy Houston & Terri Archer |
| **Creation Date:** | 7 January 2013 |
| **Last Updated:** | 17 January 2013 |
| **Version Number:** | 1.1 |
| **Document ID:** | file://J:\Implementation & Stakeholder Relations\PISRL\PROJECTS - PISRL\Channel Strategy\Client Engagement\Client Focus Groups\Project Charter - Client Focus Groups - 17Jan2013.docx |

# PROJECT CHARTER

| | |
|---|---|
| **Project Name:** | **Channel Strategy: Client Focus Groups** |
| **Expected Completion Date:** | **March 31, 2013** |
| **Executive Sponsor and Project Champion:** | **Janice Nakamura** |
| **Project Director:** | **Judy D'Gal** |
| **Project Manager:** | **Terri Archer** |

**Background:**

In May 2012, Regional Operations prepared a Stakeholder Engagement Plan as part of the Channel Strategy to enhance service delivery.

One component of the plan is to consult with BCEA clients through externally facilitated focus groups on the ministry's service delivery channels, including the proposed online client portal.

Regional Operations has contracted focus group facilitation to Berlin Eaton, based on their proposal of 20 December 2012.

Focus groups will be conducted in early 2013, to inform development of the online portal prototype and the enhancement of our other service channels.

**Business Needs / Purpose:**

The business need / purpose of the client focus groups is to:

- Ensure development of the online self serve portal is informed by client input
- Identify opportunities for improvement to existing service delivery channels, including quick wins
- Enhance ongoing dialogue processes with stakeholders and feedback loops

**Project Goal:**

Initiate a primary consultation process to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel.

**Project objectives:**

The objectives of the client focus groups are to:

- Introduce the online portal vision to clients
- Obtain feedback on the online portal prototype
- Understand the preferences, needs and decision-making criteria for clients in choosing a service channel
- Clarify opportunities for self serve channel, and barriers to access
- Identify support(s) required for self-serve channel
- Analyze and determine service delivery processes that are best suited, both for efficiency and effectiveness, to each type of channel
- Gain an understanding of what our clients' needs are for service channels

**Scope:**

***In scope:***

- Preparation for focus group sessions, including developing a Steering Committee and a final Project Charter, by mid- to late-January
- Delivery of five focus group sessions, one in each region, including Steering Committee meeting to correct course as required after second session, with completion of all sessions by end February 2013
- Preparation and delivery of final report by March 31, 2013

***Out of scope:***

- Staff focus group sessions
- Development of the online portal prototype
- Roll-out of "quick wins" based on focus group results

**Timeline (for Focus Groups):**

| Timeline | Deliverable | Lead |
|---|---|---|
| Jan 14-18 | Information Note, PIA, STRA & start Project Charter | Terri / Darcy |
| Jan 21-25 | Approvals for IN, PIA & STRA | Terri / Darcy |
| | Steering Committee kick off mtg & finalize Charter | Terri & Steering Committee |
| | Finalize contract with Berlin Eaton | Terri & Steering Committee |
| Jan 28 - Feb 1 | Secure venues, finalize details & identify participants for Regions 2 & 3 focus group sessions | Steering Committee & Regional leads |
| Feb 4-8 | Contact focus group participants for Regions 2 & 3 | TBD |
| | Secure venues, finalize details & identify participants for Regions 4 & 5 focus group sessions | Steering Committee & Regional leads |
| Feb 12-15 | **Conduct Regions 2 & 3 focus group sessions (separately)** | Berlin Eaton & MSD reps |
| | Contact focus group participants for Regions 4 & 5 | TBD |
| | Secure venues, finalize details & identify participants for Region 1 focus group sessions | Steering Committee & Regional leads |
| Feb 18-22 | Steering Committee mtg to review session & make adjustments | Terri & Steering Committee |
| **Feb 25-Mar 1** | **Conduct Regions 4 & 5 focus group sessions (separately)** | Berlin Eaton & MSD reps |
| Mar 4-8 | Steering Committee mtg to review session & make adjustments | Steering Committee |
| | Contact focus group participants for Region 1 | TBD |
| **Mar 11 - 15** | **Conduct Region 1 focus group session(s)** | Berlin Eaton & MSD reps |
| Mar 18-22 | Final report from Berlin Eaton | Berlin Eaton |
| Mar 25 - 28 | Steering Committee mtg to review final report | Terri & Steering Committee |

## Steering Committee:

| | |
|---|---|
| **Regional Operations:** | |
| **Janice Nakamura** | Executive Sponsor |
| **Judy D'Gal** | Project Director |
| **Terri Archer** | Project Management Lead |
| **Darcy Houston** | Project Officer |
| **Pardip Bandechha** | Project Analyst |
| **Jennifer Anholt** | Channel Strategy Communications Manager |
| **Colleen Turner** | Information Management Branch lead *(Client Portal)* |
| **Berlin Eaton - contracted facilitation agency:** | |
| **Richard Eaton** | Facilitator |
| **Norma Glendinning** | Facilitator |
| **MSD Regional Reps (Community Relations Service Quality Managers – CRSQs):** | |
| **Jeannine Bousquet** | Region 1 |
| **Jean Lofthouse** | Region 2 |
| **Trent Brown** | Region 3 |
| **Harleen Price** | Region 4 |
| **Ian Harrower** | Region 5 |

## Committee Purpose:

- To gain a common understanding of the project's scope, deliverables, timeline and responsibilities – (as documented in this detailed Project Charter)
- Assess learning from initial focus group(s) and make adjustments as needed
- To keep focus group sessions on track to meet project goals

**Stakeholders to be engaged during the Project:**

The stakeholder groups to be engaged during the project are:

- Clients – representing a broad cross section of clients, with consideration to the greatest proportion of client caseload who continually access services
- SSISD / portal development team
- Ministry Directors of Service Delivery (DSDs)
- Service and Organizational Excellence Committee (SOEC)
- Research Branch (Rob Bruce – identify client samples)
- Regional leads (CRSQs or delegates)
- Ministry of Citizens' Services and Open Government – David Hume
  - BC Stats: Public Sector Research & Evaluation– Martin Monkman & Beth Collins

Other stakeholder information considered is the feedback from advocates (from focus group sessions, etc).

**Goals for the Project Team:**

The goals for the project team are to:

- Ensure all focus groups and final reporting are complete by March 31, 2013
- Ensure meaningful feedback is provided to client portal development team
- Ensure meaningful feedback is provided to other service delivery channel leads

**Deliverables:**

Major deliverables are:

- Focus groups – one in each of the five regions
- Standardized focus group session agenda **(see Appendix A)**
- Two Notes: Decision Note on funding, Info Note on focus group plan and participant selection
- Privacy Impact Assessment (PIA)
- Security Threat Risk Assessment (STRA)
- Communications Plan
- Final report on focus group sessions

**Project Governance and Roles, Responsibilities and Resources:**

- **Berlin Eaton**
  - Work with Steering Committee to prepare and finalize agenda, materials, etc. to course correct as required, and to finalize report
  - Work with regional leads to finalize venues, participant selection, etc. to ensure successful focus groups
  - Facilitate all focus groups and update Steering Committee on findings
- **Regional Operations** – Janice Nakamura – approve project
  - Judy D'Gal – project oversight for entire Stakeholder Engagement Plan and communications plan
  - Terri Archer – project manager – guide project phases through approvals
  - Darcy Houston – project analyst/support – draft PIA, STRA, Project Charter and work plan
  - Pardip Bandechha – communications planning, contractor liaison, facilities / venue liaison, oversee catering
  - Jennifer Anholt – assist with formal communications plan and messaging
- **Regional leads (CRSQs)**
  - assist in identifying and securing local venue options
  - potentially assist with participant selection/invitation
  - local liaison for catering
  - regional rep to introduce session to participants (or provide delegate)
- **GCPE** – Susan Mader – review and approve external communications

**Project Budget:** *[to be expanded in detail by Berlin Eaton]*

**CONTRACTOR**

All project costs, including preparing for, conducting, and writing up a final report on the focus groups are covered by unexpended contract dollars, estimated as follows:

| | |
|---|---|
| • Berlin Eaton contract | s.13 |
| • Travel costs for contractor | |
| • Food and beverages | |
| • Supplies | |
| • Room/venue rental (as needed) | |
| • Client out of pocket expenses | |
| **TOTAL** | **$41,577** |

**MINISTRY**

- Administrative costs to develop and oversee the focus group project are covered by the ministry
- Administrative costs to develop and oversee communications are covered by GCPE / Regional Operations

Regional Operations assumes cost of headquarters rep to attend focus group sessions.

**Key Messages about this Project:**

The **key messages for the client focus groups** are:

- The ministry is committed to looking for new and innovative ways to deliver better and more efficient service to our mutual clients.
- Understanding the needs of our clients will help us to deliver programs and supports that best address those needs.
- We want people to tell us about the changes that they think would help our overall service delivery, including feedback about the income assistance application process.
- The ministry will continue to work with our external stakeholders/advocates to ensure they know about the channel strategy and understand the purpose of the project.
- The focus of launching a primary consultation process is to receive feedback about our current service delivery channels and to support channel development, with supports by an ongoing and successively more extensive process to monitor client satisfaction by specific channel.
- The ministry will be launching focus groups that will be used to obtain feedback on client consultation, as well as perceptions around client needs and supports.

**Channel Strategy**

- The Ministry of Social Development is planning on launching a new online self serve portal in 2013. This new online portal will provide our clients with more choices in how they receive services from the ministry, and offers the flexibility of 24/7 access from a place and time of their choosing.
- The introduction of a new online service delivery option expands on the current internet/online, face-to-face and telephone service options to offer an additional service channel for clients.
- The ministry will begin piloting the first phase of the online portal by introducing some ministry service offerings that clients can choose to access online. With each phase, the ministry plans to introduce additional online service offerings, and will closely monitor the effectiveness and make appropriate adjustments based on feedback. *[Series of releases through to 2015]*
- This new tool offers an opportunity to streamline processes for both clients and workers, reducing time and effort, while at the same time offering more choice for clients in how, when and where they access Ministry services.

**Feedback for Consideration:**

David Hume – Citizen's Services and Open Government

- People can tell you something, but then act another way (e.g. great interest and support for the use of tablets but once implemented, not well used); Difference between I'm *curious* about (if I'd use it) versus, I *know* I'd use.
- Three perspectives to consider; what people *say*, what they *do*, and what they *make* - how would you design the process? (e.g. telephone service, client online portal)
- Ministry should consider what it already knows (what has been done in the past) and how that can inform what we do now.

Inderjit Randhawa – DSD Region 3

- Supports doing focus groups separately in each region due to significant variation in client demographics and to ensure a fulsome range of feedback; also appeals to advocates to consult across the province. Demographics, even just within Regions 2 & 3, include Immigration population, DTES, and area-specific mentalities and issues.

Matt Treger - Director, Performance and Risk Assessment – Region 4

- Recommends keeping the required number of Ministry reps in each session at a minimum in an effort to ensure that there is no bias or influence to the feedback given by clients.

Lynn Boule - Director, Performance & Risk Management – Region 3

- Agrees with Indy – Regions 2 and 3 are a bit of a microcosm and we need feedback from more rural and/or smaller areas as well to get a balance
- Agrees with Matt – cautions about the power imbalance between clients and Ministry through over-participation by the ministry

Community Relations Service Quality (CRSQ) Regional Managers

- Ian Harrower, Region 5 – will be difficult for clients from outside of PG to attend session due to geography

**Approval:**

| I have reviewed this Project Charter and I approve it. | | | |
|---|---|---|---|
| **Name:** | **Title:** | **Signature:** | **Date:** |
| Janice Nakamura | Executive Director<br>Regional Operations | | |
| Judy D'Gal | Director<br>Regional Operations | | |
| Susan Mader | Communications Director<br>GCPE | | |
| Rob Bruce | Executive Director<br>Research Branch | | |
| Richard Eaton | Berlin Eaton | | |
| Norma Glendinning | Berlin Eaton | | |
| | | | |

## Service Channel Strategy - Client Focus Group Sessions

### *DRAFT* Agenda

1. **Opening Remarks..... 5 minutes**
   - *Welcome and opening remarks*
   - *Ground rules*
   - *Review of agenda and brief context of session*
2. **Current Service Delivery Channels ..... 5 minutes**
   - *Clients currently contact the ministry through several channels: telephone, online application tool, face-to-face, mail, fax and some email).*
3. **Possible Future Channel Enhancements..... 20 minutes**
   - *Overview of possible self-serve channel option*
   - *Demo of self serve portal*
4. **Participant Feedback..... 25 minutes**
   - *What they think will work*
   - *What they think won't work*
   - *Any supports they might need to use the portal*
   - *Other functionality they'd like to see*
   - *Other opportunities for service delivery efficiencies to enhance client satisfaction*
5. **Next Steps..... 5 minutes**
   - *What the Ministry will do with the feedback*
   - *Future input - voluntary consent to be contacted for follow-up*
   - *Thank participants*

**NOTE:** Agenda may be refined further after initial focus group, as needed.

APPENDIX B

## Sample Targeted Questions for Client Focus Groups

- What methods have you used to get service from MSD in the past? (e.g., in person, by telephone, over the internet, using the SSAA, by another method?)
- How do you prefer to access services? Why? [*Get numbers / % by channel*]
- What challenges, if any, do you face in accessing services based on each service channel? (online/internet, telephone, face-to-face)
- What encourages you to get services through a specific service method?
- Do you have access to a computer? [*Get numbers / % yes/no*]
- Are you comfortable using a computer? [*Get numbers / % yes/no*]
- Do you need any supports to use a computer? (e.g., speech reader, other accessibility aids or devices, etc.) [*Get numbers / % yes/no*]
- Do you use phones and internet for other business (banking, utilities, etc.) interactions?
- Do you use the phone or internet access resources available through community agencies, Employment Service Centres, etc.?
- How important is 24/7 access to services to you?

### Telephony Specific Questions: *(provided by Mary LaBoucane)*

- Since the deployment of the new telephony hours of operations (9am -4pm), have you seen an improvement in reaching our service centres?
- Did you get through our phone lines right away? Were you satisfied with the length of time it took to get through to us on the phone?
- Do you find the messaging in the phone system useful? What type of messaging would you like to see upfront before reaching a worker?
- How many attempts did you make to reach a worker?
  (If more than one attempt) Why did you make multiple attempts?
- If you had the option to leave your number and receive a call back from a worker, how likely would you be to utilize this option? Why?
- How was the service you received? Were you satisfied with the service you received?
- Are phones your preferred approach to the Ministry? Why?
- How can we improve our phone services to serve you better?

### Face-to-Face Specific Questions: *(provided by Mike Woodcock)*

- Is it challenging to get to an office for F2F service? Is there a cost (transit, parking, etc) to get to an office? Access to a telephone – if so, cost factor of phone, cell time, access to computer (desk top, iphone, WIFI, etc.)
- If you prefer F2F over other access channels, why?
- What is your experience with our call centre (1-866)? More specifically, have you used it since August? (As the phones have performed better than F2F service during this period).
- In comparing going to an Employment and Assistance office or using the 1-866 phone service to meet your need, if you were consistently able to reach a worker on the phone within 2 minutes, would you use the phone or go to the office?

**Evans Locker, Ann SDSI:EX**

**From:** Bousquet, Jeannine M MSD:EX
**Sent:** Monday, March 11, 2013 11:26 AM
**To:** Bandechha, Pardip MSD:EX
**Subject:** Client Group
**Attachments:** Client Group.docx

Hey Pardip. Just making sure you have the most up to date list for Nanaimo.

Jeannine

Page 514

Withheld pursuant to/removed as

s.22

**Evans Locker, Ann SDSI:EX**

**From:** Houston, Darcy L MSD:EX
**Sent:** Wednesday, February 27, 2013 11:34 AM
**To:** Bandechha, Pardip MSD:EX
**Subject:** FW: ats 02950 - focus

Hi Pardip, here is the list. In case you don't already have the script, etc., I've attached them below as well. I will Communicator you with the password for the Excel file.

*Darcy Houston*

---

**From:** Ganti, Sridevi MSD:EX
**Sent:** Wednesday, February 27, 2013 11:10 AM
**To:** Houston, Darcy L MSD:EX
**Cc:** Hayes, Sean P MSD:EX
**Subject:** ats 02950 - focus

Hello Darcy,

Please find data for the Victoria region.

Thank you,
~Sri

[redacted]

---

**sri** ganti | Information Analyst | Ministry of Social Development | ☎250.387.3759| 🖷250.387.2364 |
sridevi.ganti@gov.bc.ca

Studies show that trees last longer when not cut down...please do not print this email unless you have to.
This message is confidential and may not be copied or used without the express written consent of the sender. Thank you.

**From:** Houston, Darcy L MSD:EX
**Subject:** FW: Approved Script for Participant Invites & Reminder Call

Hi Angie,

I've attached two emails below:

- The first contains the approved script, and some information around its use
- The second contains a template letter you can use if you need to send out bus tickets to clients to get to the session

If you need anything further, please let me know. Thanks so much,

(Ian, cc: ing you to ensure you also have all the info at hand.)

*Darcy Houston*
Senior Project Management Officer
Regional Services Division
6th Floor, Belmont Building
Phone: (250) 356-6080 (New!)
Email: Darcy.Houston@gov.bc.ca (New!)
Please don't print this e-mail unless you really need to.

---

**From:** Archer, Terri MSD:EX
**Sent:** Tuesday, February 5, 2013 9:52 AM
**To:** Houston, Darcy L MSD:EX
**Subject:** Approved Script for Participant Invites & Reminder Call

Hi Darcy, attached is the approved script for the invitation to participate in the client focus group session and the reminder calls.

We recognize the script will mainly serve as a guide given that there will be a more natural flow that the conversation will take. Just please keep in mind the following:

- we must keep client confidentiality/privacy practices top of mind
- ministry is looking for feedback from client perspective on our service channels
- participation in no way relates to their IA file or eligibility (it is entirely voluntary)
- lunch is provided and bus tickets available to cover travel to and from the session if needed to participate

Should circumstances arise where a client would like to participate but needs special accommodation (e.g. interpreter, hearing device, etc), or even where the participant would be in a financial bind around childcare, these should be raised to us, through the CRSQ, as one offs to see what accommodation we can provide.

Thank you.

*Terri Archer*
Senior Project Manager
Regional Operations, MSD
Ph: (250) 356-6718
***Though no one can go back and make a brand new start, anyone can start now and make a brand new ending.***

---

**From:** Archer, Terri MSD:EX
**Sent:** Tuesday, February 5, 2013 4:56 PM

**To:** Seder, Denise MSD:EX
**Cc:** Houston, Darcy L MSD:EX; Walker, Darleen MSD:EX
**Subject:** RE: Approved Script for Participant Invites & Reminder Call

Hi Denise, as indicated, we can manage the follow-up (bus ticket requests and more info by mail) similar to a client letter to be included with the bus ticket as needed.

Attached is a template letter (approved through GCPE) for this purpose. I have incorporated the information from your drafted letter into this version. It is important that we note participation is voluntary and has no implications to their IA eligibility.

Thank you for keeping us in the loop.

We will need a participant list once ready so we can pre-complete our thank you certificates for participants. I intend to have them signed off by the ADM and will bring them to the session in anticipation.

Thanks Denise!

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

# FOCUS GROUP PARTICIPANT RECRUITMENT

**IMPORTANT - Prior to contacting clients:**

**Please note: We MUST be mindful that we are contacting these clients outside of ministry eligibility and we have a responsibility to protect their privacy. Do NOT leave a message or identify to anyone else who answers that there is involvement with the ministry.**

- **Please ensure you have all the following details prior to making the calls:**
  - **Time, date and location of the focus group in your region**
  - **Relevant details about the venue – e.g., what are the cross streets? What transit route is it on? and**
  - **Name and direct contact number of the ministry rep in case of follow-up questions**

  *(You may want to type this information directly into the scripts below)*

- **Look up each client in ICM:**
  - **Exclude any clients for whom participation is clearly inappropriate (e.g., third party administration, end stage of terminal illness, etc.) – clients with alerts should already be excluded from the list.**
  - **Check for any communication needs that will affect call, e.g., need for an interpreter, or for TDD service for hard of hearing clients.**

- **If client cannot attend the group, but is still very interested in giving their feedback:**
  - **Ask if the client would like you to pass on their name and contact number to the project lead, Terri Archer, for follow-up.**
  - **If yes, ask for a good time (a window, i.e. between 9-11am, morning, afternoon, even evening) to call them back, then send the information to (Terri.Archer@gov.bc.ca)**

- **If respondents have questions, comments or requests for service *not* related to the focus group:**
  - **Refer them to the 1-866 number, e.g. "I'm sorry, but I'm not able to process requests for service. This call is strictly for research purposes. You can call our general line at 1-866-866-0800, and a ministry worker will be happy to help you."**

**Script for invitation to participate:**

Hello, may I please speak to _____ [*client name*]?

Hi, my name is _____ and I am calling from the Ministry of Social Development. The Ministry is always looking for ways to deliver better, more efficient service.

We are studying how clients access our services, and we are looking for some clients who can provide us feedback on our service delivery options by participating in a focus group session on [Date]. The group will take about half a day, so lunch will be provided.

Participation is completely voluntary. Whether you choose to participate or not will *not* affect your eligibility for assistance in any way. If you do participate, your feedback will be kept

## FOCUS GROUP PARTICIPANT RECRUITMENT

strictly confidential. The opinions you provide will be combined with feedback from other clients so that no individual client can be identified.

Would you be interested in participating in the focus group?

[IF NO] Okay, thank you very much for your time. [END CALL]

[IF YES] That's great, thank you. Let me give you a few more details. The focus group will be held:

> [*Location details*]
>
> Do you know where that is? [*Give details, e.g., cross streets, bus route, etc.*]
>
> [*Date* and *Time*]
>
> Please be sure you are there by [*15 minutes prior to start time*] so the facilitators can start the session promptly at [*start time*].

[IF CLIENT CANNOT ATTEND DATE/TIME] Okay, thank you very much for your time. [END CALL]

Lunch will be provided. Do you have any special needs we should be aware of, such as allergies or diet restrictions?

The focus group will be led by a non-ministry facilitator. The ministry is looking for open and honest feedback about where our service delivery works well, and where it could be improved.

The group will look at how the ministry delivers services now, as well as how we might deliver services in the future.

In addition to providing lunch, the ministry will provide a bus ticket for clients if needed to participate in the session. Bus tickets will be available at the session.

If you'd like, we are happy to give you a reminder call the day before the session. If you have any questions about the session, or if you are unable to attend, please call [Name] at [Direct Number] to let us know.

Thank you very much for helping us to improve our services. We look forward to your feedback. I hope you enjoy the session. [END CALL]

**Script for Reminder Calls:** [*If reminder call requested for the day before the focus group*]

Hello, may I please speak to _____ [*client name*]?

Hi, my name is _____ and I am calling from the Ministry of Social Development. I'm just calling to remind you about the focus group tomorrow at [*Location*] at [*Time*], and to remind you that lunch will be provided.

Thank you very much for helping us to improve our services. We appreciate your time to provide us feedback. [END CALL]

February 5, 2013

***Name***
***Address Line 1***
***Address Line 2***
***City BC Postal Code***

Dear ***Name***:

Thank you for agreeing to participate in the **[Surrey]** focus group to provide feedback on the ministry's service delivery channels. The ministry is always looking for ways to deliver better, more efficient service.

Participation is completely voluntary. Whether you choose to participate or not will not affect your eligibility for assistance in any way. If you do participate, your feedback will be kept strictly confidential.

As you requested, here is the session information. The session will be held at:

***[Location]***
***[Day, Date]*** at ***[Time]***

Please be sure you are there by ***[15 minutes prior to start time]*** so the facilitators can start the session promptly at ***[start time]***. The session will take about half a day, so lunch will be provided.

Enclosed is a bus ticket for your transportation to the session. A return bus ticket will be available at the session.

If you have any questions about the session, or if you are unable to attend, please call ***[Name]*** at ***[Direct Number]*** to let us know.

Thank you very much for helping us to improve our services. We look forward to your feedback, and hope you enjoy the session.

***[Local contact]***

Ministry of
Social Development

[Office Name here]

Mailing Address:
[address here]

Telephone: ### ###-####
Facsimile: ### ###-####

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | D'Gal, Judy MSD:EX |
| **Sent:** | Thursday, February 14, 2013 1:35 PM |
| **To:** | Bandechha, Pardip MSD:EX |
| **Subject:** | FW: Good news re: Client Session today -- Got a dozen! |

fyi

Judy D'Gal
Director, Implementation and Stakeholder Relations Regional Operations, Regional Services Division Ministry of Social Development
Telephone: (250) 387-9271; Facsimile: (250) 952-6450
E-mail: judy.dgal@gov.bc.ca

-----Original Message-----
From: D'Gal, Judy MSD:EX
Sent: Thursday, February 14, 2013 12:59 PM
To: Moysey, Sharon J MSD:EX; Nakamura, Janice N. MSD:EX
Subject: FYI: Good news re: Client Session today -- Got a dozen!

Hi Sharon,

Further to our earlier discussion, today's client focus group session in Region 3 is going really well. 12 attendees! And, most of which are indicating they'd use the portal!

Can't wait to get the feedback from all sessions so we can roll up - there are some great messages here.

(see below for more detail from Terri about the day, including that the certificates are a huge hit with clients)

Judy D'Gal
Director, Implementation and Stakeholder Relations Regional Operations, Regional Services Division Ministry of Social Development
Telephone: (250) 387-9271; Facsimile: (250) 952-6450
E-mail: judy.dgal@gov.bc.ca

-----Original Message-----
From: Archer, Terri MSD:EX
Sent: Thursday, February 14, 2013 11:55 AM
To: D'Gal, Judy MSD:EX; Bandechha, Pardip MSD:EX
Subject: Re: Got a dozen!

Thanks, I appreciate that. I was feeling a bit like I failed on that one.

Today there are 12 well engaged participants, of which, 8 feel they would use the online portal. The videos are a huge hit!

It is challenging to keep the discussion focussed on service delivery and not all the gaps through government services and such but we're managing well. It is absolutely clear to me that me and the local rep are critical to these sessions to drill into specifics and address more local practices etc. That is going very well.

I'd better get back. Today is already a success, the rest is gravy :)

I will be going to the office after to chat with staff but for how long will depend on this session. I'd love to catch the 5pm ferry s.22

Have a great day and please let Sharon know the certificates are a good touch, yesterday's participants sincerely appreciated them.

Terri

---- Original Message ----
From: D'Gal, Judy MSD:EX
Sent: Thursday, February 14, 2013 10:44 AM Pacific Standard Time
To: Archer, Terri MSD:EX
Subject: RE: Already have 4 here

Quick update for you too, I had a chat with Sharon Moysey this am to update her on the client session yesterday. All good, no worries at all about lack of attendees, this is a learning process we all agree, and first time we've ever done this.

Let's debrief further when you are back, but sure appreciate these quick updates through the day :)

Judy D'Gal
Director, Implementation and Stakeholder Relations Regional Operations, Regional Services Division Ministry of Social Development
Telephone: (250) 387-9271; Facsimile: (250) 952-6450
E-mail: judy.dgal@gov.bc.ca

----Original Message----
From: Archer, Terri MSD:EX
Sent: Thursday, February 14, 2013 9:56 AM
To: Bandechha, Pardip MSD:EX; D'Gal, Judy MSD:EX; Houston, Darcy L MSD:EX; Anholt, Jennifer A MSD:EX
Subject: Re: Already have 4 here

Then there were 6....

---- Original Message ----
From: Archer, Terri MSD:EX
Sent: Thursday, February 14, 2013 09:43 AM Pacific Standard Time
To: Bandechha, Pardip MSD:EX; D'Gal, Judy MSD:EX; Houston, Darcy L MSD:EX; Anholt, Jennifer A MSD:EX
Subject: Already have 4 here

Good start today. This is a great venue. Easy to get to. It's the first campus building in front of the bus stop so that couldn't get better.

We have four clients already and the session doesn't start until 10am.

More update after we get started.

**Evans Locker, Ann SDSI:EX**

**From:** Lofthouse, Jean C MSD:EX
**Sent:** Tuesday, February 5, 2013 1:16 PM
**To:** Bandechha, Pardip MSD:EX; Archer, Terri MSD:EX
**Subject:** RE: February 13.

The supervisors are

| | | |
|---|---|---|
| Christina Jagpal | 604 660-2959 | Dockside, 251 |
| Rita Karajaoja | 604 660-0053 | Kiwassa, 254 |

Jean Lofthouse, Manager
Community Relations and Service Quality
Ministry of Social Development
Phone: 604-660-2212
Cell: 604 417-2646
Fax: 604 660-2503

**From:** Bandechha, Pardip MSD:EX
**Sent:** Tuesday, February 5, 2013 1:08 PM
**To:** Archer, Terri MSD:EX; Lofthouse, Jean C MSD:EX
**Subject:** RE: February 13.

Thanks again Jean. Can you tell us who the supervisor is in that office?

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

This message is confidential and may not be disclosed to anyone without the express written consent of the sender

**From:** Archer, Terri MSD:EX
**Sent:** Tuesday, February 5, 2013 12:30 PM
**To:** Lofthouse, Jean C MSD:EX
**Cc:** Bandechha, Pardip MSD:EX
**Subject:** RE: February 13.

Thanks Jean. I certainly don't want to impose or create work for anyone. That is not my intention.

It's just nice to be able to connect with staff face-to-face when the opportunity arises (which are fewer and farther between now-a-days). I also thought it fit well with the staff engagement plan to connect with staff on the Channel Strategy project.

Thanks for your help in arranging this.

Cheers,

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

*"It won't be the ability to fiercely compete but the ability to lovingly cooperate that will determine success" (Kouzes and Posner, 2002)*

---

**From:** Lofthouse, Jean C MSD:EX
**Sent:** Tuesday, February 5, 2013 12:24 PM
**To:** Bandechha, Pardip MSD:EX
**Cc:** Archer, Terri MSD:EX
**Subject:** February 13.

Hi there,

Sorry for the confusion this morning.
I have booked the Kiwassa and Dockside teams on February 13 at 4 pm for a get together at their offices at Main and Powell. It's about a 10 minute walk from the Library. They are looking forward to seeing you. Bring an umbrella! ☺

Jean Lofthouse, Manager
Community Relations and Service Quality
Ministry of Social Development
Phone: 604-660-2212
Cell: 604 417-2646
Fax: 604 660-2503

**Evans Locker, Ann SDSI:EX**

**From:** Lofthouse, Jean C MSD:EX
**Sent:** Tuesday, February 5, 2013 1:28 PM
**To:** Bandechha, Pardip MSD:EX
**Subject:** RE: February 13.

Yes, they are co located. The upstairs/downstairs thing.

Jean Lofthouse, Manager
Community Relations and Service Quality
Ministry of Social Development
Phone: 604-660-2212
Cell: 604 417-2646
Fax: 604 660-2503

**From:** Bandechha, Pardip MSD:EX
**Sent:** Tuesday, February 5, 2013 1:20 PM
**To:** Lofthouse, Jean C MSD:EX
**Subject:** RE: February 13.

Hi Jean

one last question. Will both office staff be at one location?

**From:** Lofthouse, Jean C MSD:EX
**Sent:** Tuesday, February 5, 2013 1:16 PM
**To:** Bandechha, Pardip MSD:EX; Archer, Terri MSD:EX
**Subject:** RE: February 13.

The supervisors are

| | | |
|---|---|---|
| Christina Jagpal | 604 660-2959 | Dockside, 251 |
| Rita Karajaoja | 604 660-0053 | Kiwassa, 254 |

Jean Lofthouse, Manager
Community Relations and Service Quality
Ministry of Social Development
Phone: 604-660-2212
Cell: 604 417-2646

Fax: 604 660-2503

---

**From:** Bandechha, Pardip MSD:EX
**Sent:** Tuesday, February 5, 2013 1:08 PM
**To:** Archer, Terri MSD:EX; Lofthouse, Jean C MSD:EX
**Subject:** RE: February 13.

Thanks again Jean. Can you tell us who the supervisor is in that office?

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

**This message is confidential and may not be disclosed to anyone without the express written consent of the sender**

---

**From:** Archer, Terri MSD:EX
**Sent:** Tuesday, February 5, 2013 12:30 PM
**To:** Lofthouse, Jean C MSD:EX
**Cc:** Bandechha, Pardip MSD:EX
**Subject:** RE: February 13.

Thanks Jean. I certainly don't want to impose or create work for anyone. That is not my intention.

It's just nice to be able to connect with staff face-to-face when the opportunity arises (which are fewer and farther between now-a-days). I also thought it fit well with the staff engagement plan to connect with staff on the Channel Strategy project.

Thanks for your help in arranging this.

Cheers,

*Terri Archer*
Senior Project Manager, Stakeholder Relations
Regional Operations, MSD
Ph: (250) 356-6718

*"It won't be the ability to fiercely compete but the ability to lovingly cooperate that will determine success" (Kouzes and Posner, 2002)*

**Evans Locker, Ann SDSI:EX**

| | |
|---|---|
| **From:** | Walker, Darleen MSD:EX |
| **Sent:** | Friday, March 22, 2013 4:06 PM |
| **To:** | Archer, Terri MSD:EX; Lofthouse, Jean C MSD:EX; Seder, Denise MSD:EX; Brown, Trent D MSD:EX; Ruel, Janis M MSD:EX; Harrower, Ian MSD:EX; Bousquet, Jeannine M MSD:EX; Bandechha, Pardip MSD:EX; Hare, Kashmir K MSD:EX |
| **Cc:** | D'Gal, Judy MSD:EX; Houston, Darcy L MSD:EX |
| **Subject:** | RE: Client Focus Group Reporting Info |

Region 2's response written beside the questions.

Darleen Walker
Supervisor @ 270 - North Shore
Ministry of Social Development
1050 Churchill Crescent
North Vancouver, BC
Tel: 604 981 0098
Fax: 604 987 5481

-----Original Message-----
From: Archer, Terri MSD:EX
Sent: Friday, March 22, 2013 3:46 PM
To: Lofthouse, Jean C MSD:EX; Walker, Darleen MSD:EX; Seder, Denise MSD:EX; Brown, Trent D MSD:EX; Ruel, Janis M MSD:EX; Harrower, Ian MSD:EX; Bousquet, Jeannine M MSD:EX; Bandechha, Pardip MSD:EX; Hare, Kashmir K MSD:EX
Cc: D'Gal, Judy MSD:EX; Houston, Darcy L MSD:EX
Subject: Client Focus Group Reporting Info

Hello all, as the client sessions wrap up (the last planned session is on Monday which will complete the run of 7 sessions total), I am just trying to collect all the data for the final reports.

I want to start off by applauding all of you for your time, effort and commitment to the Channel Strategy project. Consulting with clients directly has its challenges to say the least but we were able to connect directly with approximately 60 clients so far with one more session to go. In addition, we informed what's likely to equate to a few hundred clients that we are interested in feedback on our service channels. That's where I'm hoping you can provide me some further information based on your direct experience in rallying clients for your regional focus group.

For those of you directly involved in contacting clients, including consulting advocacy or equivalent organizations for focus group participants, I would appreciate responses to the following questions so I can include the information in my reporting as part of our Lessons Learned. Thank you. Also, if I have missed anyone directly involved, please let me know.

Please note that in the interest of not consuming more time than necessary to get this information, your best guess/close is sufficient. I will preface my reporting on this as anecdotal and 'approximately...'

- How many clients did you attempt to contact? 94 calls made, which took 3 days to do so , to get 15 to volunteer to attend
- How many clients did you actually connect with? (Please separate if direct contact was made or message left) all 94 less the few where phones were no longer in service.

- Main challenge in being able to connect with clients getting clt's at home, left lots of messages of which the majority of people rined my call, but declined to attend.
- How many clients 'confirmed'. (We already know how many actually attended) 16
- Any other key learning or observations made during this process? clt's were very hesitant and didn't want anything to do with MSD, others thought it was a good idea but not interested in coming due to various reasons ( medical appt conflicting , liked things just the way they are, daycare, several seniors turning 65 very soon, and come MH issues. Several phone no longer in service

Thank you all once again for your time and dedication. The client sessions and direct feedback obtained through them would not have been possible without the engagement of great colleagues like you! I look forward to reporting out to you in the near future.

Finally, in the interest of protection of privacy re: client info, please remember to delete any/all client-specific info with regard to this project, particularly emails (includes all folders, Inbox, Sent, Deleted, etc.). I have retained anything needed for the project.

Cheers,

Terri Archer
Senior Project Manager, Stakeholder Relations Regional Operations, MSD
Ph: (250) 356-6718

"It won't be the ability to fiercely compete but the ability to lovingly cooperate that will determine success" (Kouzes and Posner, 2002)

Pardip Bandechha
Policy and Project Analyst
Ministry of Social Development
Tel: 250 387-2889
Email: Pardip.Bandechha@gov.bc.ca

**This message is confidential and may not be disclosed to anyone without the express written consent of the sender**

**Evans Locker, Ann SDSI:EX**

**From:** Archer, Terri MSD:EX
**Sent:** Tuesday, March 26, 2013 7:46 AM
**To:** Bandechha, Pardip MSD:EX
**Subject:** Re: Client Focus Group Reporting Info

This is great, thanks! That is a LOT of calls you made! Holy smokes. Good lesson to report out on as experiences were similar in the challenges to actually connect with client. Thanks again.

Terri

---

**From:** Bandechha, Pardip MSD:EX
**Sent:** Monday, March 25, 2013 08:13 PM Pacific Standard Time
**To:** Archer, Terri MSD:EX
**Subject:** RE: Client Focus Group Reporting Info

Hi Terri

**Here is my roll-up for Region 1 & 2:**

**Region 1 – Victoria:**

*How many clients did you attempt to contact?*

- 14 Confirmed
- 19 – Spoke too and client not interested or not available (i.e., not available on the day, has doctor or other conflicting appointments, not comfortable in group setting or just not interested)
- 161 - Total Phone numbers called (i.e., wrong number, voicemail, no answer, , not home, number not in service, answering services)

*How many clients did you actually connect with? (Please separate if direct contact was made or message left)*

- 33 clients (includes the 14 confirmed clients and the 19 not interested)
- Did not leave any voice messages

*Main challenge in being able to connect with clients*

- Wrong numbers
- A lot of the phone number, I think were pay as you go cell numbers

- Ability to leave voice mail
- Numbers has disconnected
- Got voicemail

*How many clients 'confirmed'. (We already know how many actually attended)*

- 14 Confirmed

*Any other key learning or observations made during this process?*

- I think in the future, we should have the folks on phone with clients, have an option to do a survey over the phone or offer to mail client survey that they could fill out if they aren't available to come to the session
- For the folks who do have computers, it would of been nice to be able to direct them online so they can learn more about the channel strategy and provide feedback online

**Region 2 – Vancouver:**

*How many clients did you attempt to contact?*

- 16 Confirmed
- 26 – Spoke too and client not interested or not available (i.e., not available on the day, has doctor or other conflicting appointments, not comfortable in group setting or just not interested)
- 187- Total Phone numbers called (i.e., wrong number, voicemail, no answer, , not home, number not in service, answering services)

*How many clients did you actually connect with? (Please separate if direct contact was made or message left)*

- 40 clients (includes the 16 confirmed clients and the 26 not interested)
- Did not leave any voice messages

*Main challenge in being able to connect with clients*

- See above (Comments in Region 1)

*How many clients 'confirmed'. (We already know how many actually attended)*

- 16 Confirmed

*Any other key learning or observations made during this process?*

- See above (Comments in Region 1)

# Ministry of Social Development
## Channel Strategy
## Advocate Focus Groups - Executive Summary
**March 31, 2013**

## Introduction

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and, determine and monitor client satisfaction on an ongoing basis. One deliverable of the Plan is to hold focus group sessions with external stakeholders, with the target audiences identified to be advocacy organizations and clients.

On January 8, 2013 the Ministry of Social Development hosted an initial focus group session with advocacy organizations that provide direct service to our clients. Approximately 20 advocacy organizations from Regions 2 and 3 attended a face-to-face session and provided feedback on current and proposed ministry service delivery channels. Participants had the opportunity to share feedback as well as participate in a Courtyard Café to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email, etc). Advocates worked together to identify priority service delivery enhancements for the ministry's consideration.

The ministry had the following primary goals for the session:

- Develop awareness of the Channel Strategy Project.
- Provide a demo of the online self-serve portal and seek feedback.
- Seek feedback on the effectiveness of the ministry's current service delivery channels (including Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email, etc.)
- Seek consolidated advocate feedback to identify priority service delivery enhancements for consideration.

Subsequent focus group sessions were held via live meeting (and conference call) with advocacy organizations in Region 1 (March 6), Region 4 (March 14) and Region 5 (March 21). Participants reviewed the summary of feedback from the Region 2 & 3 consultation session and were provided an opportunity to add any other feedback and priority suggestions.

A total of 58 advocates, representing approximately 45 advocacy organizations, attended the sessions and provided feedback on the ministry's service channels, including the client online portal currently under development by the ministry with a phased launch anticipated to begin fall of 2013.

## Channel Strategy – General Feedback

A reoccurring theme was the support for service delivery enhancements that result in better integration of channels rather than taking a reactionary approach to resolving individual service delivery pressures (holistic vs. band-aid approach for future enhancements).

Advocates expressed that the ministry should carefully consider which services best align with which channels and then promote those services through those channels.

Advocates also cautioned that if the ministry cannot hire more staff to meet demands, it should better utilize existing resources by triaging and developing more subject matter experts in specific policy/program areas. If the ministry is not returning to a caseload model of service delivery, advocates suggested introducing more centralized/specialized services (i.e., CPPD in Provincial Services and Medical Transportation Specialized team in Region 5 were positive examples noted).

By making improvements to other service delivery channels and enhancing integration of existing channels through a Channel Strategy, advocates agreed that face-to-face services would be more available to clients that have needs that require access to that channel.

## Online Client Portal

During the sessions, a demonstration of the online self-serve portal was provided.

Discussion was lively and interactive with numerous questions about functionality and support for the tool (i.e., will there be multiple languages, can offices be searched by postal code, need to ensure plain language and that the labels and graphics make sense to clients, how is the site secured, how will support for the portal be resourced).

Advocates also provided some cautions: don't assume that users have any computer knowledge and we'll need to protect our clients from fraudulent behaviour. Further, the ministry will need to ensure appropriate supports are available in the offices for clients using online self serve services (i.e., some computer monitors are currently in plain view of line ups, no barriers or tables for paper work, have staff available and willing to help).

There was strong support for a pilot and phased in approach, though advocates cautioned that the ministry really needs to understand who will use this tool and project volumes.

Advocates felt strongly that this should be introduced as an additional channel, and not replace current channels. Advocates also cautioned that the portal is not suitable for all clients, and that ministry staff – and not advocates – will need to be available to assist clients to use the portal.

## Service Delivery Feedback – by Channel

***TELEPHONE***

Advocates identified the following three priority service delivery enhancements for the telephone service delivery channel:

- **1 800/1 866 or direct phone line for advocates (or liaison worker)******
- **Ability to send faxes directly to phone line (1 866 or other line)**
- **Technology needs improvement (designated SSAA contact when no call back)**

*stars represent repeated support

Advocates expressed the following as some of the existing issues with the current telephone channel:

- Not fully accessible (e.g. requires phone access and cost prohibitive for many)
- Lack of coordination for call backs (e.g. no call back or advised to call back later)
- Dropped calls, busy signal, long wait times, many call backs
- Clients including those with ESL, mental health issues or hearing impaired, are asked to contact by phone where these clients' needs can not be effectively met through this channel

Many advocacy organizations suggested that improved access to the ministry to facilitate advocacy needs when working with our clients and the ability for advocates to fax documents (i.e., the ROI/Consent) to a designated phone line for expedited profiling would alleviate some of the pressures on this channel. Advocate feedback also included a suggestion to provide a dedicated phone line specific to SSAA queries (when no call back received). Advocates note that telephone service eliminates travel and waiting in a line at an office, which is an effective channel for many clients.

Advocates believe if we could implement some of these ideas, it would help with the current issues and improve the service delivery experience on the telephone.

Advocates also expressed that they are provided effective service via telephone when needing to access a supervisor and/or Community Relations and Service Quality manager

***FACE-TO-FACE CHANNEL***

***Advocates*** identified the following three priority service delivery enhancements for the face-to-face service delivery channel:

- **Increase accessibility (and physical space) for those in need of this channel (i.e., all language, literacy and disability needs)****
- **Do not turn away clients – need better coordination of services across all channels***
- **Staff it – adequate level of resources, skill set, self care and self-awareness as a priority focus**

*stars represent repeated support

Advocates expressed the following as some of the existing issues with the current face-to-face channel:

- Not enough face-to-face services available to those clients that really need to receive their service from the ministry through this channel
- Being turned away to another service channel and lack of coordination of service channels (need to work together); staff need to use their discretion and apply accommodation techniques
- Resourcing – need to resource it, both staffing and training

Advocates expressed that focusing on resolving these priorities would improve the face-to-face service delivery experience.

Advocates expressed their appreciation for continuing to have a face-to-face service channel available.

***INTERNET / ONLINE CHANNEL***

Advocates identified the following three priority service delivery enhancements for the internet/online service delivery channel:

- **Improve the Self Serve Assessment and Application tool**
  - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool and some messaging so they know if they are done too quickly (i.e., finished in 5 minutes) that their application is probably incomplete**
  - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand***
  - **Fewer words – more simple words – and online help**
  - **Improve the Immediate Needs Assessment (i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them and better mechanism to identify and respond faster*****
  - **More signs you are done; i.e., if applicants are given a checklist upfront**
- **Appointment booking****
  - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet****
- **Improve the Online Resource search function and make clients more aware of this resource**

*stars represent repeated support

Advocates expressed the following as some of the existing issues with the current Internet/Online channel:

- Self-Serve Assessment and Application tool needs improvement:
  - Improve the online application tool (estimator, clarity, technical support for applicants, feedback loop if not working, plain language, length, contact info, etc.)
  - Clients need to know how to follow up on their application, particularly if they don't have a phone (suggest having application set appointment at the end)
  - Further clarification needed to tell a client they are "not done" (application has not yet been submitted)
  - Allow applicants to flag questions for follow-up discussion on the online application (allows ministry to track/prioritize questions that need improvement)
- Online Resource (OLR) needs enhancements:
  - Index is helpful but layout/design is confusing and hard to navigate (needs technical/design improvement)

Advocates indicated the OLR is good for professionals and a good resource for finding forms, current legislation and policy updates/recent changes. And, they commented that the online application works well for some applicants and provides a private/anonymous and convenient way to apply.

***OTHER CHANNELS (OUTREACH, MAIL, FAX, EMAIL, ETC.)***

Advocates identified the following three priority service delivery enhancements for the other service delivery channels:

- **Increase the number of liaisons (Employment and Assistance Workers, mental health and homeless outreach services)**
- **Ability to email supervisors to fast track urgent requests and those not requiring face to face, i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
- **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

*stars represent repeated support

Advocates expressed the following as some of the existing issues with the current "Other" channel:

- Delays in addressing Immediate Needs Assessment service requests
- Not common knowledge about availability of outreach/ministry workers (i.e. not clear who to call)
- Processing delays for faxes – triaging and more effective follow-up needed
- Need improved processes for mailing, setting deadlines and follow-up

Advocates also provided feedback that homeless outreach services (when available), mental health and other designated workers, are very effective. And, advocates appreciate when they are able to email supervisors to fast track requests.

## Summary and Next Steps

The ministry values its ongoing dialogue with the advocacy community, at the local and regional level, and provincially, including through the Moving Forward Steering Committee.

Leveraging these existing relationships to receive service delivery feedback from advocacy organizations across the province that provide direct service to our clients is a positive step forward. Through delivery of these sessions, the priority was to engage in a broad and open dialogue with advocacy organizations.

Advocates expressed their genuine appreciation for being provided an opportunity to learn about the ministry's Channel Strategy Project, and provide feedback on:

- a demo of the ministry's online self-serve portal;
- the effectiveness of the ministry's current service delivery channels (including Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email, etc.)
- priority service delivery enhancements for consideration.

The consolidated feedback from these external stakeholders will assist in determining our current service delivery effectiveness and inform future service delivery decisions.

Regional Operations Branch will continue to provide regular updates on our progress with the Channel Strategy initiative, including engagement initiatives. The Branch will also keep advocacy organizations informed, to provide updates on future service delivery enhancements, including those that relate to the feedback we received.

BRITISH COLUMBIA | Ministry of Social Development

# Channel Strategy

# Advocate Focus Groups

***(January – March 2013)***

# Full Report – *What We Heard*

March 31, 2013

## Introduction

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and, determine and monitor client satisfaction on an ongoing basis. One deliverable of the Plan is to hold focus group sessions with external stakeholders, with the target audiences identified to be advocacy organizations and clients.

On January 8, 2013 the Ministry of Social Development hosted an initial focus group session with advocacy organizations that provide direct service to our clients. Approximately 20 advocacy organizations from Regions 2 and 3 attended a face-to-face session and provided feedback on current and proposed ministry service delivery channels. Participants had the opportunity to share feedback as well as participate in a Courtyard Café to discuss each channel option (Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email, etc). Advocates worked together to identify priority service delivery enhancements for the ministry's consideration.

The ministry had the following primary goals for the session:

- Develop awareness of the Channel Strategy Project.
- Provide a demo of the online self-serve portal and seek feedback.
- Seek feedback on the effectiveness of the ministry's current service delivery channels (including Internet/Online, Face-to-Face, Telephone, other including outreach, mail, fax, email, etc.)
- Seek consolidated advocate feedback to identify priority service delivery enhancements for consideration.

Subsequent focus group sessions were held via live meeting (and conference call) with advocacy organizations in Region 1 (March 6), Region 4 (March 14) and Region 5 (March 21). Participants reviewed the summary of feedback from the Region 2 & 3 consultation session and were provided an opportunity to add any other feedback and priority suggestions.

Through delivery of these sessions, the priority was to engage in a broad and open dialogue with advocacy organizations. The consolidated feedback from these external stakeholders will assist in determining our current service delivery effectiveness and inform future service delivery decisions.

A total of 58 advocates, representing approximately 45 advocacy organizations, attended the sessions and provided feedback on the ministry's service channels, including the online self-serve portal which is currently under development by the ministry with a phased launch anticipated to begin fall of 2013.

Colored text indicates region from which the comment originated.
*Stars represent repeated support.

**LEGEND**
**Region 2/3** Session (Jan 8 2013)
**Region 1** Session (Mar 6 2013)
**Region 4** Session (Mar 14 2013)
**Region 5** Session (Mar 21 2013)

# Advocacy Organization Feedback:
## Roles/Experiences/Examples

*Advocates were provided the opportunity to share what is tricky with the ministry's current service delivery channels.*

### General Comments

- Inefficient service delivery system for clients – stressful*
- Channels and accommodation not available (available ministry resources vs. actual client need)*
  - Provincial interpretation and accommodation services not offered despite policy****
  - Need more resources on the frontline*
  - Outreach is good when available *******
- Wait time for all channels are too long (i.e., waiting for shelter response, client can end up losing housing)
- Expect more from government i.e., no office, no one worker (can't connect to the same person; lack of consistency regarding information provided to client (client getting different answer for the same request) and repeating story)*******
- Increased expectation of client independence (over reliance on personal responsibility of client)
- More integration needed for face-to-face and telephone channels – how they work together is problematic*
- Life skills – many clients don't have, which creates reliance on duplicate contacts with ministry
  - Which clients, which channel – not efficient or well understood from client perspective
- Sending in with no referral/request number attached is problematic in the offices
  - Prevention and Loss Management Services process for faxing information is more effective (i.e., ability to send faxes direct to one number); should consider 1 866 for faxing and profiling
- Channel strategy needs purposeful/useful channeling (so changes in one channel don't impact another)
- Balancing service delivery vs. client need – ensuring the processes are effective to reduce the pressures and improve service for clients
- Workers in the ministry and other agencies need more training in policy to reduce confusion and call backs ****
- Develop specialized skills – new workers don't have enough knowledge *****
- Release of Information/Consents – more efficiency needed
  - Staff often cannot locate on system; especially tricky when urgent
- Language or other barriers (i.e., aboriginals, immigrants, refugees and certain segments of caseload)
  - These clients don't understand what ministry requires, find processes very difficult, and have a great need for interpretation services and face to face service*

- Use expertise of advocates to provide orientation/training to ministry staff on a regular basis
- Eligibility issues – clients waiting for call, advocate not available when ministry call back occurs
- Is there a way to expedite applications? (i.e., identify client ability – then explain which way is best based on each client's ability)
- Wait times for Immediate Needs Assessments – clients waiting weeks**********
- Difficulty understanding the family bonus top up policy (i.e., new baby)
- Workers need to ensure they record all details of request and interaction history with client. If worker is unsure of what the client is asking, they should be asking clarifying questions and documenting everything***
- Difficulty accessing crisis supplements (what constitutes an unexpected expense)
- Clients being told they are not eligible for income assistance, and interpret this to mean they are also ineligible for disability assistance***
- Streamline Persons with Disabilities policy/process – extremely difficult
- Ministry offices turning away clients requesting paper applications or disability applications
- Mental health clients are unable to navigate through system, need specialized process and designated worker
- First contact should be friendly and helpful*
- Role of worker is unclear and what is happening with client information (i.e., who is making a decision versus who should just be passing along the information to a decision maker)
- Indigenous training for all front line staff and consider specialized worker for aboriginals
- Assistance/help for visually impaired available through phone service
- Regional advocate calls, access to CRSQ and Supervisor works well and appreciate the level of service by some workers at the face to face offices***
- Need clarity on the role of Service BC (in some cases Service BC clerks provide incorrect information which causes hardship for client); need clarity re: ministry vs. a Service BC office**
- Frontline staff need domestic violence training
- Ministry needs better understanding of rural restrictions (i.e., getting a bank statement can be very difficult as client needs to travel to another community to get it) that cause delays
- Ministry needs to accommodate different time zones within the province
- Workers need more training, as they are providing incorrect information to clients

## Telephone Channel

- Phone system – dropped calls and staff not available
    - Disconnect between staff beliefs about system performance (information regarding queue) and caller experience/advocate perception
- Advocates working with clients – cannot reach ministry and client leaves, which causes delays
- Telephone system – routing of urgent requests not effective
- Ministry resourcing – emphasis on telephone service (i.e., away from face-to-face)*
- Move to 1 800/1 866 – misdirected calls doesn't work*
- Must use phone i.e., some clients don't have phones and costs money on cell phones***
- Call centre across regions are not integrated
- Call wait times have improved
- Advocates being advised (on phone) they would only address one client issue per call due to high call volumes (after waiting 20 minutes to get through)

- Difficulty applying
    - Lack of life skills/computer skill level - some clients do not have the skills necessary to apply online*****
    - Computer literacy – language – who is helping them? If clients have a lower level of computer skills, or language barriers, who is supposed to help them use the online application? Advocates often find they are providing this support role which takes time away from their other responsibilities
    - No SIN card can't do online application tool
    - State up front - system should more clearly indicate what information is required upfront (i.e., SIN), before the person starts the application
    - At the end of the process is very frustrating - if a client does not have a SIN, but does not learn one is required until the very end, they lose all of their information and have spent 1 - 2 hours applying that will have to be re-done
    - Can't access online system - clients may not have access to a computer/internet but they are being directed to do the application online****
    - Applicants – lose information, application freezes, must start again; don't remember the assessment number, or their password, or take more than 5 days to return to their information. Alternatively they may not save the information before exiting the application
    - Why assess for job skills if applying for disability? Application asks questions that would allow other questions to be skipped, but why present employment questions?
    - Online application– privacy – times out after 45 minutes -the time out period is not long enough for some clients to understand the question, what is being asked for, collect the required information and enter it into the system
    - Offices – online application - not helping clients - offices are directing clients to go to the online application and are not providing assistance to help clients do the application online
    - Many stop after the assessment and think they are done. The instructions need to be clearer that you are done step 1, and what step 2 is (i.e., a checklist)
        - Simplify content (i.e., job skill) - some of the questions, wording and help is too difficult for some clients to understand (i.e., 2 year independence) how it applies to them. Language needs to be grade 3 – 6 level, plain language
        - When finishing the online application, clients are not sure when they are finished
    - Online application - estimator tool is not always accurate as it doesn't take into account individual extenuating circumstances
- Clients who have applied
    - No understanding of the process (i.e., what happens next after the application is submitted), is not clear to clients. In some cases, clients are not receiving a call back, but they didn't know they were supposed to, or what they should do if they don't get a call*
    - No response - some clients have submitted an application and not received a response. This may be due to client's not continuing after the assessment, the call back not being successful or applications going astray or otherwise not being actioned for some reason

- Difficult to track down application - if clients only have the assessment number, workers can't look up applications based on that number, nor retrieve applications after five days have passed
- Online application needs to be simplified - ministry needs a way to better direct clients to the most suitable channel for them, as online does not work for all applicants and help is not available
- Online application – lack of documents – some clients do not have all the documents required at the time of application and there is no way for them to provide them after the fact
- Documents going missing
- Clients being asked to gather a lot of information prior to initial assessment of eligibility (i.e., in some cases client is clearly ineligible but still asked to gather information)

- Privacy issues
  - Applying in public places - libraries, office kiosks and other public places do not always offer enough physical privacy space for the kinds of sensitive questions clients are answering

**Face-to-Face Channel**

- Clients do not have the funds to get to the office*
- Offices lack privacy (in some offices client paper work showing), lack of computer access, do not have table or chairs, no visors, clients being harassed while on system, security is busy and need more support for applicants
- Some clients being turned away from the face-to-face offices and being told to call *
- Clients will go away, without receiving service, due to frustration
- Face-to-Face channel works well
- Face to face access doesn't seem to exist; services are minimal i.e., drop off papers

**Other - Relationship with Advocates**

- Offloading to community agencies, particularly with clients who have problems with literacy – not just this ministry, but overall there are exponential increases
- Advocates not always available
- Increase need for advocates (need more)
- Given the reliance on advocates, special support needed such as advocacy line and access to supervisors
- What's working is when we have settlement workers and ministry staff e.g., Surrey – OPTIONS (Integration two times a week, application on site and education)
- Advocates attending offices face-to-face being sent away to call*
- Advocates being advised (on phone) they would only address one client issue per call due to high call volumes (after waiting 20 minutes to get through)
- Communication between advocates and ministry is not timely which causes delay in eligibility issues for clients
- Advocacy groups should be made aware of policy changes that impact eligibility when they are introduced (i.e., fleeing abuse)
- Face-to-face offices are more familiar with working with advocates (much harder to establish the relationship over the phone). Losing the ability to do creative problem solving
- Where relationships developed (worker/advocate) works very well****

**Other – Policy**

- Persons with Disabilities – why do they have to complete employment questions*******
- Reconsideration and Appeal
    - Information not in appeal record (since Phase 2 of ICM)
    - The ministry needs a reconsideration and appeal checklist for all denials, i.e., Persons with Disabilities
- Disclosure –timeline – package issues
    - Wrong due date on packages
    - Reconsiderations packages – clients are waiting weeks to receive
    - Deadlines firm unless a clients knows to contact Reconsideration Branch (i.e., works with advocate)
- Workers are using the reconsideration process when they haven't explored all other options (i.e., phone call to Health Assistance Branch)
- Employment plans – clients don't understand what they mean
- Medical Services Only challenging – apply for medical equipment i.e., advocate doesn't know client status – and client has to apply again which is unnecessary effort
- Clients unclear on implication of certain policies on eligibility (i.e., child and spousal support)
- Women in transition house – ministry needs the policy to include fast tracked eligibility appointment and also not assume all needs are being met at the transition house [(the transition house is not able to provide some needs in all circumstances (i.e., specialized baby formula)]
- Difficulty understanding the family bonus top up policy (i.e., new baby)
- Streamline Persons with Disabilities policy/process – extremely difficult
- Government putting money into computer systems instead of rates is problematic*

## Advocacy Organization Feedback: Online Portal Demo

*Feedback on scope, functionality and support for portal*

### Online Client Portal Channel

- BC Housing Model – this is a good example of a portal that is effective
- Needs to be inclusive for vulnerable groups
    - Concerns regarding not requiring signature
    - How is this secure - risk/benefit analysis requires knowledge of who is accessing what through what channel; requires technology/logistics in place to ensure privacy (i.e., secure computer terminals) and reduce risk of predators (i.e., Prevention and Loss Management Services focus)
- Can this be used for submitting Monthly Report - value as this is done monthly; or, Release of Information
- Volume – anticipate how many emails
    - Limits on phone service accessibility acts as a barrier to determining true levels of client service requests. What if this system open flood gates for an unmanageable level of service requests?
- Can this be tied to Red Book (211) – community resource
- Find an office – can we search by postal code?
    - Will this be clear if a person is applying online?
    - Find an office icon – "?" – don't assume users have any computer knowledge
- Language – will there be more languages introduced in portal? Can we list languages available?*
- Plain language – use grade 3 - 6 level (i.e., use simple language)*****
- Registration – need to make it clear that this is a first step, optional, but has benefits
- SIN numbers – thought they were not used for security reasons
- Website vs. portal – need to explain how they are different
- Can it show if a client's cheque has been signalled? Can this indicate why a cheque is signalled, so that a client can resolve before cheque issue
- Will we be consulting others, ie. public guardian and trustee?
- Workers – how do they navigate
    - How will this be resourced? (do not use existing resources needed to support other channels)****
    - Integration with ICM system – will they have another system to search? needs to be integrated
    - Don't launch until other issues related to missing applications and other documents are remedied
    - Concerns regarding Employment and Assistance Workers still learning ICM – concerns regarding introducing another new system to learn
- Need to ensure this is not another system that results in services being downloaded on community agencies (i.e., can ministry outreach workers set up computers in community agencies and be there to assist clients with navigating) ***
- Need to ensure clients have opportunities to be trained by the ministry on how to use this**

- Online portal is perceived to require more advocate capacity and resources to assist the client to use**
- Ensure the portal will be an additional channel, and not replace current channels ***
- Portal is not for everybody (i.e., immigrants, language barriers, mental health issues, homeless, low literacy or low computer skills), these clients need face to face service (fear this will become mandatory just like the online application)*******
- Determine what service delivery channel is best based on service request (i.e., barriers of a client are not visible online)
- Need to ensure ministry offices are equipped with computers and have staff available for clients to guide clients**
- Need to develop service standards for response times for questions/emails received through the portal
    - Does the question get directed to local office or network office?
    - Will there be a dedicated worker answering the questions or will all workers be receiving the questions?
- Will there be a cc option for any emails that are being sent to client (i.e., include advocate in response)
- Will the forms need to be scanned? Will a client require a scanner?
- Can stubs be submitted?
- Ability to view the document and submission history
- Once implemented, ministry should consult on what is working and what isn't
- Will the portal be available publicly? Available to advocates?
- Portal may further marginalize clients who are already marginalized*
- Government putting money into computer systems instead of rates is problematic*
- Liability issues for advocates assisting clients
- Clients do not have access to scanner, printers etc
- Will work well for high functioning clients and advocates but not the majority of the ministry's clients********
- Consider turning into a mobile site
- Manage my account is a good feature
- This further limits face to face service (i.e., potential for clients to come to office for Intent to Rent form and sent away to print online)
- Ministry is relying on communities to resource the online portal without providing funding. Library computer budget have been cut. Where will clients access?
- Run pilot in remote area to determine if it works (area with geographic barriers). Ensure the pilot does not include advocate help
- Potential for clients to be lost in cyberspace between portal and the online application
- Concern portal is a transfer of responsibility from ministry to community resources

## TELEPHONE CHANNEL

**Top Three Priorities Identified by Advocates:**

- **1 800/1 866 or direct phone line for advocates (or liaison worker)****
- **Ability to send faxes directly to phone line (1 866 or other line)**
- **Technology needs improvement (i.e., dropped calls, busy, many call backs and repeat calls)**

***What's Working***

| | |
|---|---|
| • Ability to speak with someone ** | • Connected to ICM |
| • Access to Supervisor/CRSQ**** | • No travel, no line ups* |
| • Accessible to large population | • Most people have phones |
| • Do not want to go to office | |

***What's Not Working***

| | |
|---|---|
| • Dropped calls, busy signal, many call backs, clients ********** <br>• Long wait time***** | • Advocates/clients being told that worker will call back at certain time and it doesn't happen or being told to call back at a later time** <br>• Delays in profiling documents* |
| • Not fully accessible***** <br>  ○ Long distance calling restrictions <br>  ○ Free access, no privacy, time limits <br>  ○ Some cell phones charge roaming*** <br>  ○ Most clients have pay as you go cell phones, or cell phones that only receive text or incoming calls** <br>  ○ Doesn't work if client doesn't have access to a phone**** <br>  ○ Most communities in the north don't have pay phones <br>  ○ Using advocate office to receive calls is problematic | • Forced to use as only option i.e., ESL, mental health, hearing, forced to use phones ******* <br>• Call backs creates barriers (i.e., interpretation) <br>• Clients with language barriers need better accommodation (i.e., messages being left in English) |
| • At times – cant do – send email instead | • Prompts changed |
| • Things should be done by workers not CRSQ *** | • Clients having to tell their story multiple times**** |
| • Phones used to undermine face to face <br>• No accountability on quality of service (provide a way to identify worker i.e., ID number) ********* <br>• Lack of consistency (client being given different answer for the same question each time they call)******** | • Workers need to take better notes on file (sometimes a casual question doesn't get recorded and ends up being crucial)** <br>• Call centre staff need to be trained on sensitivity* |
| • Workers hang up when unable to call back *** <br>• Clients miss call from ministry, the client tries to call back the number on call display, but the number doesn't take incoming calls <br>• Clients being told that we called you back, | • Roles and responsibilities need to be clarified between call centres and offices (i.e., clients being directed to phones when they come to offices and vice versa)** <br>• Clients have concerns over who has access to their personal information |

| | |
|---|---|
| but client did not receive a call | • Clients hesitant to use call centres (associate with negative experiences i.e., collections) |
| • Issues with direct phone line for advocates, what about the clients? | • Need option to speak with worker at any time (i.e., please press "0". Phone menu is overwhelming for some |
| • Need ability to fax to person to ensure they receive it | • Workers should not have time limits for how long they should be on the call with clients |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • 1 800/1 866 for advocates ********** | • Release of Information, have fax go to phone system ****** |
| • ESL interpretation of messages *** | • Phone number specific to online application when no callback received *** |
| • Callback option ** | • More information for clients upfront at application** |
| • Let advocates know when the peak call times are (or best time to call) | • Putting in direct line (telephones) direct access phones in the office |
| • Consider scan and email option – ability to take picture and send email | • Designated workers |
| • Call back option reduces times for clients | • More efficient system is better for all |
| • Better access for advocates | • Liaisons make it easier more efficient (i.e., Advocates talk about 2 – 3 files at a time is efficient* |

## FACE-TO-FACE CHANNEL

**Top Three Priorities Identified by Advocates:**

- **Increase accessibility (and physical space) for those in need of this channel (i.e., all language, literacy and disability needs)****
- **Do not turn away clients – need better coordination of services across all channels***
- **Staff it – adequate level of resources , skill set, self care and self-awareness as a priority focus**

***What's Working***

| | |
|---|---|
| • Still available – connection – preferred option as helps to see ministry as human ***** <br>  ○ More likely to disclose information <br>  ○ Trust established <br>  ○ Opportunity to voice/personalize situation** <br>  ○ Get more information at first contact | • Workers able to serve in other languages ****** <br>  ○ Worker and client able to pick up on non verbal cues – very important for ESL clients and visual look e.g., crisis – similar to non-verbal – you can tell when somebody is in need |
| • Specialized services (connecting)*** <br>  ○ Family Maintenance Worker appointments <br>  ○ Interpretation* <br>  ○ Outreach workers going to clients <br>  ○ Aboriginal <br>  ○ HIV | • Advocate can easily get an appointment when requested ** |
| • Advocates have access to ministry liaison either on phone or in person weekly (preset time) | • Excellent staff at ministry offices – some are more helpful than others* |
| • Reduction of hours – time given to the ministry gets paperwork done | • The best option to get an immediate response***** |

***What's Not Working***

| | |
|---|---|
| • Turn away to another service ********** <br>  ○ Coordination of service channels needed as there is a need to fit together ***** <br>  ○ Staff themselves tell clients and advocates to come to office | • Resources ** <br>  ○ Staff vs. caseload, and more integration needed <br>  ○ Division of workers and reception – tell story more than once (lack of continuity) <br>  ○ Feelings among advocates/community that this service is not available i.e., applications ** <br>  ○ Increase in training to enable better decision making and applying discretion (mainly new staff) |
| • Discretionary and accommodation training i.e., new staff****** <br>  ○ Use it – don't just turn people away to another channel when right in front of you | • Privacy issues <br>  ○ See guard holding door shut <br>  ○ Conduct of guards – not appropriate – get into personal stuff (not necessary) |

| | |
|---|---|
| • Staff visibly learning ICM | • Hours of work – should match working public, and consider all time zones in BC * |
| • Need clear vision of the face-to-face channel. What is the face-to-face vision? Hours? Days? | • All client services – not just applications<br>  ○ Customer service focus (varies across province and among workers)* |
| • Mental Health advocate – having to wait unnecessarily – when told to come to office<br>• Advocates waiting in line at face to face offices | • Issues with offices<br>  ○ Children – strollers – no room/space<br>  ○ Bathrooms not being provided |
| • Intolerance taken too far (Third Party) – people get administered for every little thing* | • Paper applications are still available using this channel – this is not widely known |
| • Accessibility (face-to-face) may be the only option for some – this needs to be recognized | • Interpretation – face vs. phone *******<br>  ○ Systemic issue<br>  ○ Lack of consistency in securing and working with an interpreter during intake |
| • Limited capacity for advocacy organizations<br>• Ensure referrals make sense (i.e., client referred to the appropriate advocacy group) | • Some clients view attending an office as an adversarial process<br>• Environment cold and uninviting * |
| • Need longer hours for drop in clients | • Workers not offering designated worker when needed (i.e., mental health issues)* |
| • Referring clients to advocacy group instead of taking the time to problem solve with the client* | • Need special systems for vulnerable population |
| • Growing immigration population, don't have workers with different language skills (Region 5)<br>• Need more access to translation services<br>• Sign language | • Need worker in the reception area to help clients with the online applications |
| • Clients don't understand the difference between ministry office and Service BC office | • More outreach for people in hospital/people physically unable to attend an office** |

***Potential Benefits/Impacts***

| | |
|---|---|
| • Resource it! – staffing and training ***** | • Crisis requests – Just do it*** |
| • Set regular appointments and be consistent i.e., same time daily for walk in appointments | • Effective coordination need - face-to-face *<br>• Will then see who needs to be seen |
| • Identify "groups" to use face to face channel** | • Hours extended to mirror working public* |
| • Peer mentoring and rotation of workers | • Triage protocols (share criteria with advocates) |
| • Setting quality standards for service delivery and treating clients with respect | • |

## INTERNET/ONLINE

**Top Three Priorities Identified by Advocates:**

- **Improve the Self Serve Assessment and Application tool**
  - **Includes re-educating front line staff and supervisors on the importance of helping when applicants are having trouble with the tool (i.e., review stats by office to identify which offices are helping) and some messaging [i.e., an estimate of time it should take so they know if they are done too quickly (i.e., finished in 5 minutes) that their application is probably incomplete]**
  - **Visual indicators/warnings/graphics/checklists so more users (low literacy/language skills) will understand***
  - **Fewer words – more simple words – and online help**
  - **Immediate Needs Assessment i.e., more clarity needed to give examples of shelter/medical situations - so clients know if this is applicable to them and better mechanism to identify and respond faster*****
  - **More signs you are done; i.e., if applicants are given a checklist upfront**
- **Appointment booking****
  - **Let applicants book the appointment during the application process so they will know they are not done if they don't have an appointment date yet****
- **Improve the Online Resource search function and make clients more aware of the OLR**

***What's Working***

| | |
|---|---|
| • Online Resource – forms linked/handy resource with current legislation; works good for policy updates/recent changes, good for professionals* | • Online application – works for some, an anonymous/private way to apply; don't have to go into an office and can apply any time |

***What's Not Working***

| | |
|---|---|
| • Mandatory direction to use online application –need a feedback loop and alternatives when this is not working********* <br>• At the start of the online application, advise clients about all channels to apply for assistance and how to access them | • Web Page - What web page? The ministry home page (internet) is not a place that clients or advocates go for information |
| • Online Resource Index helpful but confusing layout/design; hard to navigate (mostly technical / design, not content – page displays inconsistently across machines/browsers) <br>  ○ Needs to be better organized, top level is alphabetically but sub-levels aren't | • Online application - structured to "require" phone access - because of the preferred call back, a phone is essentially required; applicants sometimes give advocate's office but can't wait for call, plus ties up the advocate office – not user friendly for some (i.e., technology gap) disabled*, age (seniors) seen as potential barrier as may not have computer skills, or desire/ability to learn new skills <br>• Clients need to know how to follow up on application if they don't have a phone (include instruction on the online application |

| | |
|---|---|
| | towards the end of the application) |
| • Can't skip questions on online application, or not answer them (i.e., by saying not applicable or awaiting further information to confirm) – problematic/creates delays*** <br>• Employability questions not appropriate for online application and should be part of Work BC Centres***** | • Need a way to get help on the online application - clients don't know how to get clarification on questions while they are doing the application if they aren't sure what is being asked and the help is missing or doesn't address their question** |
| • Online application not asking right questions to determine a client's needs <br>• Remove repetitive questions | • Language (various) - the online application needs to be in multiple languages* |
| • Transition from assessment into the application is not clear to new applicants <br>• Online applications being lost * | • Online application is too long / time consuming for some clients to complete i.e., 45 min – 1.5 hours* |
| • Online application - estimator tool not always accurate - almost always says not eligible; often not accurate and can discourage those that need support*** | • Online Resource – can it better explain changes – i.e., differentiate between a correction (spelling) in the regulation vs. a substantive change |
| • Online application not asking right questions to determine a client's needs | • Wait time between when the online application is submitted and eligibility interview is too long |
| • Triaging for clients at risk of becoming homeless or staying in shelters (can only stay for limited time)* | • Ministry should be providing support for clients not advocates* |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Online application needs a visual indicator intuitive to users (i.e., color change/ flashing) to give client warning message if exiting browser before submitting the application********** | • Online application needs more alerts/graphics ***** <br>• Allow clients to flag questions for follow-up /discussion on the online application (allows ministry to track/prioritize questions that need improvements)**** |
| • Online application - call back number to get status and arrange for appointment; suggest set appointment at end ******** | • Online application needs technical support – right now, advocates feel they are providing (or expected to provide)** |
| • Online application needs single #. Two numbers (assessment and application number) is confusing; make the # more visible so clients know to note and keep it* | • Online application – needs more flexibility, i.e., ability to move forward/back/edit and feedback on process/steps/ level of completion |
| • Identify reason to keep online application number* i.e., tell applicants what they will need / use the number for, so they keep it | • Online Resource needs searchable box only within Online Resource - not across web, i.e, search related documents***** <br>• Could reduce pressure on other channels** |
| • Use online application data to skip the employment questions – will make the application more relevant and shorter | • Use plain language in online application - balance between legal ,privacy and usability (reduce questions, repetition, improve understanding***** |

## OTHER INCLUDING OUTREACH, MAIL, FAX, EMAIL ETC

**Top Three Priorities Identified by Advocates:**

- **Increase the number of liaisons**
  - **Employment and Assistance Workers, mental health and homeless outreach services**
- **Ability to email supervisors to fast track requests/urgent requests/those not requiring face to face, i.e., privacy issues (clients), repetitive (i.e., bus pass), narrow scope and pilot (i.e., portal)**
- **Increase the use of triaging/fax and use of dedicated workers by issue when appropriate**

***What's Working***

| | |
|---|---|
| • Homeless outreach services (when available) ******** | • Email supervisors to fast track requests******** |
| • Ministry worker attends advocacy organization to assist with applications ** | • Access to Mental Health worker and designated workers** |
| • Fax authorizations (bus pass) if known | • Opportunity to provide ministry feedback on what is working and what can be improved |

***What's Not Working***

| | |
|---|---|
| • Delays – Immediate Needs Assessment service requests****** | • Faxes taking too long (since ICM phase 2)<br>  ○ Losing or can't find documents Release of Information<br>  ○ Fax not processed quickly – triaging****** |
| • Not common knowledge about availability of outreach/ministry workers (i.e., not clear who to call)***** | • Process – mail – deadlines follow-up ***<br>• Flawed correspondence<br>• Signal |
| • Clients don't understand why signalled cheque | • Use of notes not consistent/nonexistent |
| • Need direct line for different services | |

***Needs/Gaps/Opportunities***

| | |
|---|---|
| • Designated worker by issue for an advocate *****<br>• More centralized services (i.e., CPPD workers, Health Assistance Branch, medical transportation North)*** | • Gaps: Backend process – assigned workers |
| • Fax (or direct to specific program) to 1 866 – computer vs. worker***<br>• Advocates need follow up when they send faxes to the ministry, currently documents are being profiled with no follow-up, e.g., advocates track involvement on issues to gauge success of arguments presented | • Outreach to advocacy organizations to help identify gaps/make resources available **********<br>• Community liaisons share correct/applicable information<br>• Mental Health workers<br>• Outreach workers located in advocacy organization<br>• Workers could be liaisons<br>• Outreach workers need more time on site and back-up when away* |
| • Ability for advocate to forward application | • Targeted use of email – some transactions don't |

| | |
|---|---|
| package/documents (outside of online application) | need face to face, i.e., email – bus pass **<br>○ Expansion – keep application together<br>○ Introducing more non face-to-face channels |
| • Ensure boundaries are clear between advocacy organization and ministry | • Service Delivery Channel – Text Messaging |
| • More efficient if workers understand policy issues – subject matter experts | • Easiest to connect if established relationship and smoother process |
| • Automation/direct routing can increase efficiency | • Need more transparent/realistic timeframes |

## OTHER

**Opportunities/Recommendations to consult further with clients:**

- Paper survey or comment cards
- Survey – can be mailed with client cheques
- Focus groups - go to people where they are, i.e., "Our Place" and "Soup Kitchen"
- Continue/remain open to feedback
- Keep doing client focus groups (can use outreach workers to assist)
- Having other avenues to provide feedback without having to sit through a session
- More targeted approach (i.e., smaller communities, aboriginal)
- Frequent break and over several days
- Would be useful to come at this from a "needs assessment" point of view. What are the needs? Identify the needs first and then work on how to address collaboratively with advocates/client/staff
- Develop feedback loop at the offices, i.e., suggestion box or over the phone, complaint officer
- Go to organization that provide services to our clients and seek feedback (i.e. local agencies)

Ministry of Social Development

# Channel Strategy

# Client Focus Groups - Executive Summary

**March 31, 2013**

## Introduction

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and determine and monitor client satisfaction on an ongoing basis.

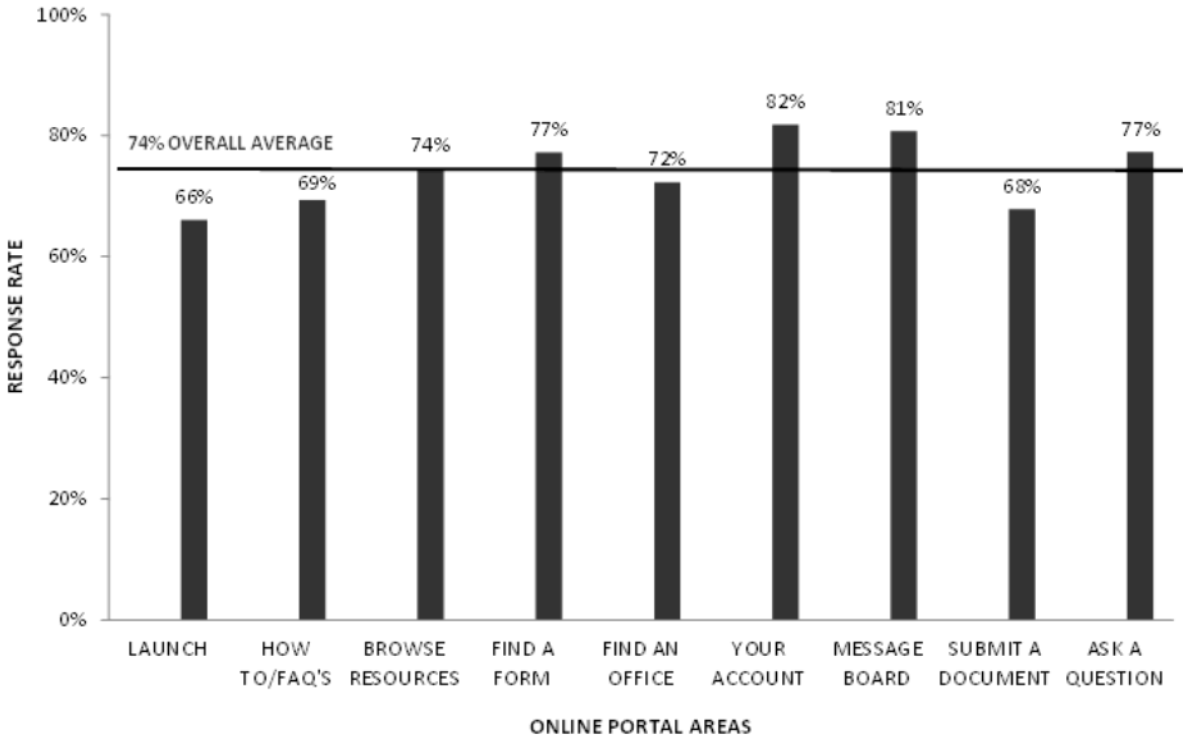
A primary deliverable of the plan was to hold focus group sessions with external stakeholders, in particular, advocacy organizations and clients. These two streams of focus groups were completed concurrently between January 8 and March 25, 2013. For client engagement, the plan was to consult with clients primarily through externally facilitated focus groups on the ministry's service delivery channels and the Online Client Portal prototype.

In February and March, seven client focus groups were held across the province in Victoria, Nanaimo, Surrey, Kelowna, Prince George and two in Vancouver. In total, 71 clients attended these focus groups. Berlin Eaton was contracted to facilitate the initial six client sessions to promote the sessions as arms-length from the ministry.

### Client Feedback on the Online Portal

Most participants were enthusiastic about the online portal option. When asked whether they would use each function, an average of 74% of participants said 'yes' (Exhibit 1). They saw it as empowering, enabling them to access ministry services on their own without having to come in to the office or call someone. Their main concerns were their ability to use a computer as well as access one in a secure environment. They liked the overall look and feel of the portal, particularly how simple, user friendly and clean it appears.

**Exhibit 1—Responses to "Would you use It?" for each online function**




Clients liked all of the features they were shown, but were most positive about the Message Board and the My Account features. In terms of improvements, clients would like the ministry to consider the following:

- include as many forms as possible and allow for completing and submitting them online;
- make sure the portal is accessible for those with visual or hearing impairments;
- ensure there are links throughout the portal to allow for easy access to a different page;
- offer a tutorial or some sort of help function or video/demo clip;
- establish service standards that promote a consistent and transparent standard of service for responding to client questions; and
- increase the number and variety of resource links and information available (e.g., job sources, food banks, housing, advocacy organizations, medical/dental and outreach services), and provide the ability to filter the information according to the clients' community

### Client Feedback on Existing Services

For each existing service delivery channel, clients were asked: what is working well and what could be improved? In reviewing the feedback across all of the focus groups, the following common themes emerged:

**General Service Delivery Themes**

Many clients mentioned how much they appreciated the support they received from particular ministry staff, outreach workers or advocates. Many clients also expressed that they experienced long waiting times for ministry services, using both the face-to-face and telephone service channels. They also frequently indicated that they would like to know upfront what services/benefits they might be eligible for. Another common concern clients expressed was the need for privacy when accessing ministry services. Some participants worried that using a public computer, i.e., library, would jeopardize their privacy. Some clients were uncomfortable explaining their circumstances at a front counter where others might be able to overhear.

**Face-to-Face Channel**

In general, participants had the most to say about the services they receive face-to-face. It is their preferred channel, and also the one they would most like to see enhanced. In general, most participants appreciate the opportunity to meet with workers face-to-face to explain their circumstances, but they would like the waiting times reduced and the quality of the service enhanced through more training on ministry policies as well as compassion, respect and disability awareness. Clients tended to be the most satisfied when they had more personal, ongoing service, whether from an outreach worker, a case worker, or an advocate.

**Telephone Channel**

The telephone channel received the next most feedback. Similar to face-to-face, clients want this as a channel option, but they would like the waiting times to be reduced and the quality of the service improved. Many said the message tree was lengthy and confusing, and highlighted the issue of cell phone costs incurred when waiting on hold for a lengthy period of time. Several clients shared personal experiences about good service from workers once they got through.

**Online/Internet Channel**

There was a general lack of public knowledge of existing online ministry resources. Those that had accessed services through this channel before said that it provided easy and convenient access to ministry information such as cheque issue dates, news bulletins and forms. However, caution was raised that accessing service online is not for everyone because it is dependent upon individual capacity and public availability, which varies by community.

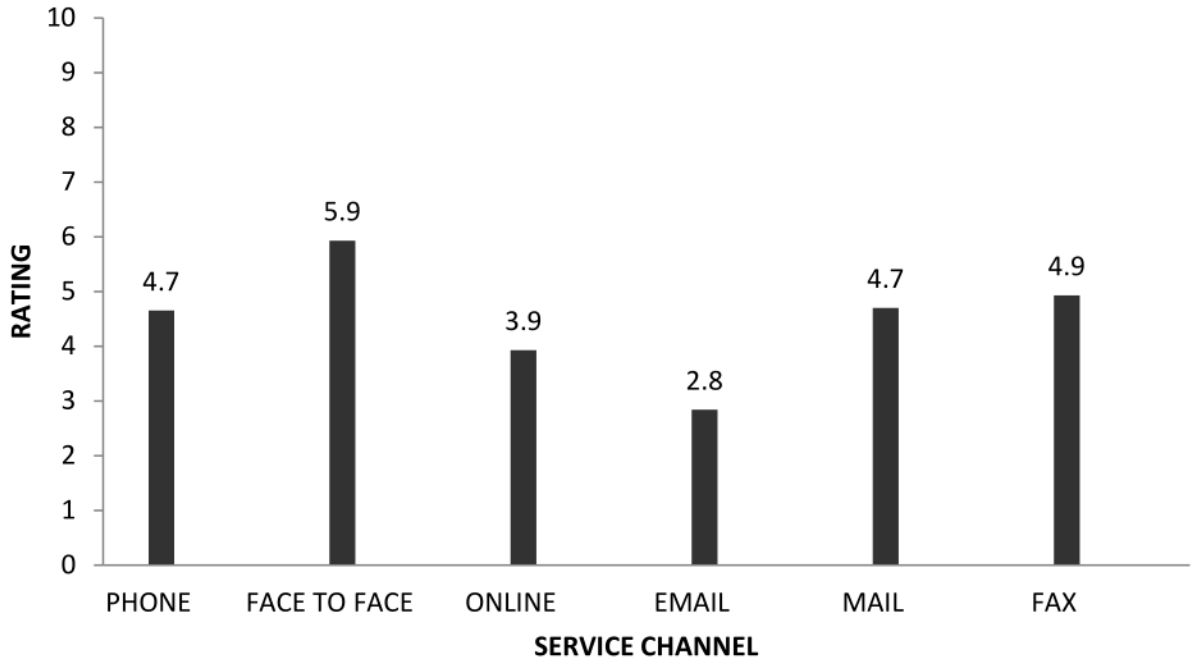
**Other Channels: Fax, Email and Mail**

Most clients either do not use these services or did not have much to say about them. They did say that mail was generally reliable and had the advantage of providing a physical document for reference. Faxes, on the other hand, were seen as cost prohibitive and harder to track. Of the three channels, clients were most attracted to the idea of email but understood that this option may not provide sufficient security and confidentiality.

### Levels of Satisfaction with Current Service Delivery Channels

At the end of the discussion, participants were asked to rate their level of satisfaction with each service delivery channel on a scale between 1 and 10, where 1 was the least satisfied and 10 was the most satisfied. As is apparent in Exhibit 2, the channel receiving the highest rating was face-to-face. Interestingly, this is the channel that also received the most feedback on opportunities for improvement.

**Exhibit 2: Current satisfaction ratings based on an average of all scores[a]**

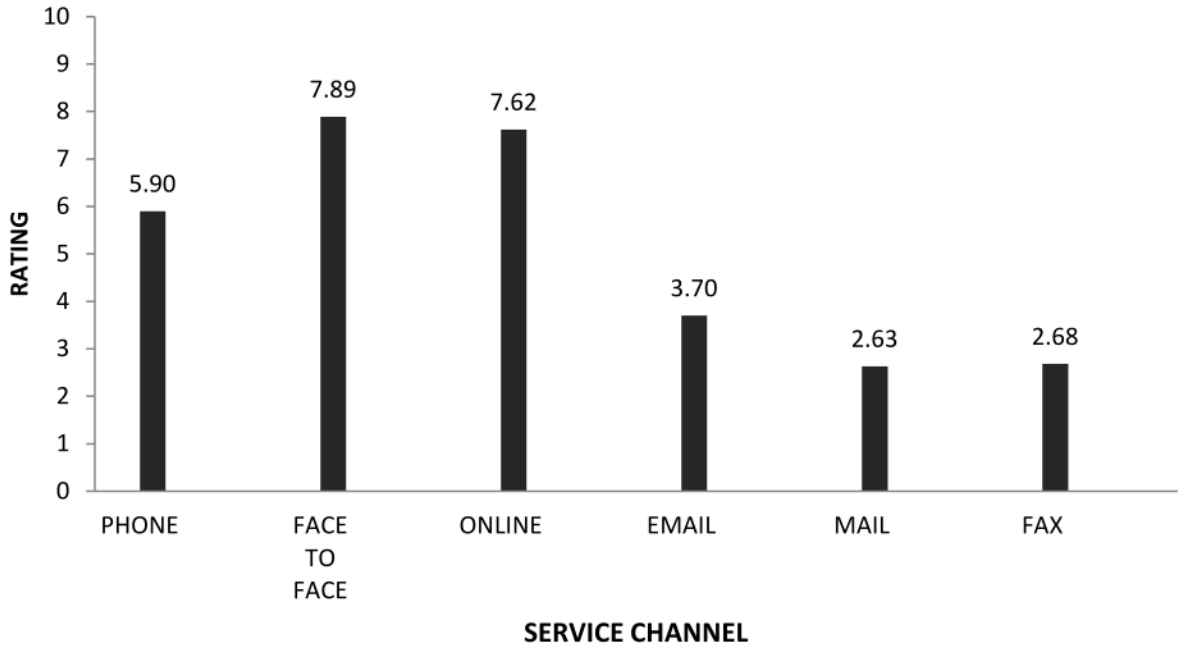



[a] These ratings do not include the first Vancouver session or the session in Surrey because clients were not asked to rate their satisfaction for these channels. Results for email, mail and fax do not include the last Vancouver session because feedback for these channels was aggregated as 'other'.

### Looking Forward

At the end of the session, clients were asked to respond to the following question: "On a scale between 1 and 10, please rate each service delivery channel on the likelihood that you will use it in the future." Exhibit 3 provides the average across all 7 sessions. Based on this feedback, the two preferred choices for clients in the future will be face-to-face and online. The desire to use the telephone was not as high and the other channels (fax, email and mail) received very low responses.

**Exhibit 3: Client likelihood to use each service channel in the future based on an average of all ratings**




### Evaluation and Next Steps

At the end of each session, participants were asked to complete a post-session evaluation. The overall rating out of 10 was 8.9, or 89%. Overall, clients were highly satisfied with the sessions and were appreciative of the opportunity to provide feedback.

The focus of these feedback sessions was to launch a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels.

Reaching out to clients for their perceptions of the current service delivery experience has been a very positive step forward. Clients were very pleased that we took the time to ask them for feedback.

The consolidated feedback from these external stakeholders will assist in determining our current service delivery effectiveness and inform future service delivery decisions.

As the ministry moves forward with the Channel Strategy we envision receiving further feedback from our clients and other stakeholders.

BRITISH COLUMBIA | Ministry of Social Development

# Channel Strategy

## Client Focus Groups

***(February – March 2013)***

## Full Report

March 31, 2013

CONFIDENTIAL

## Table of Contents


| | |
|---|---|
| Table of Contents | i |
| Background | 1 |
| Client Feedback on Existing Services | 2 |
| Client Feedback on Online Channel – Client Portal | 5 |
| Policy Feedback | 7 |
| Conclusion and Next Steps | 7 |
| Appendix 1: Approach | 8 |
| Appendix 2: Focus Group Agenda | 12 |
| Appendix 3: Rollup of Client Feedback on Current Service Delivery Channels | 13 |
| Appendix 4: Rollup of Client Feedback on Online Portal | 20 |
| Appendix 5: Evaluation and Lessons Learned | 30 |


CONFIDENTIAL

BRITISH COLUMBIA | Ministry of Social Development

Channel Strategy

# Client Focus Groups – Full Report

**March 31, 2013**

## Introduction

In May 2012, a Stakeholder Engagement Plan was developed as part of the Service Delivery Channel Strategy. The objectives of the Plan are to: obtain information and feedback to inform the Channel Strategy; identify service delivery efficiencies to enhance client satisfaction; and determine and monitor client satisfaction on an ongoing basis.

A primary deliverable of the plan was to hold focus group sessions with external stakeholders, in particular, advocacy organizations and clients. Both streams of focus groups were completed concurrently between January 8 and March 25, 2013. For client engagement, the plan was to consult with clients primarily through externally facilitated focus groups on the ministry's service delivery channels, including the Online Client Portal prototype.

The project goal is to initiate a primary consultation process to support channel development, which will be supported by an ongoing and successively more extensive process to monitor client satisfaction by channel. The key objectives are to:

- Introduce the online portal vision to clients
- Obtain feedback on the online portal prototype
- Understand the preferences, needs and decision-making criteria for clients in choosing a service channel
- Clarify opportunities for self-serve channel, and barriers to access
- Identify support(s) required for self-serve channel
- Analyze and determine service delivery processes that are best suited, both for efficiency and effectiveness, to each type of channel
- Gain an understanding of what our clients' needs are for service channels.

In February and March, seven client focus groups were held across the province in Victoria, Nanaimo, Surrey, Kelowna, Prince George and two in Vancouver. In total, 71 clients attended these focus groups. Berlin Eaton was contracted to facilitate the initial six client sessions to promote the sessions as arms-length from the ministry (see Appendix 1 for Approach and Appendix 2 for Focus Group Agenda).

CONFIDENTIAL

## Client Feedback on Existing Services

This section contains client feedback on the current service delivery channels, including general themes, as well as themes for each channel. For each channel, clients were asked: what is working well and what could be improved? (Appendix 3 includes a rollup of the feedback received.)

### General Themes

- Privacy concerns: public computer use/printing, and at times, with face-to-face counter service.
- At times, there are long wait times, particularly during peak periods for both face-to-face and phone service.
- Support from an advocate assists with coordinated and consistent service.
- Clients want to know upfront what they may be eligible for, particularly regarding PWD.

### Online Themes

- Online options provide easy and convenient access to ministry information such as cheque issue dates, news bulletins and forms.
- There was a general lack of public knowledge of existing online ministry resources.
- Accessing service online is dependent upon literacy levels, personal cost, and availability which vary by community and person and therefore it is not a suitable option for everyone.

### Face-to-Face Themes

- Face-to-face provides personal service option and perceived to be most effective method for communication/ conversation, including immediate response/update to file.
- Increased understanding of conditions of eligibility through face-to-face service.
- Face-to-face option best positioned to support clients with barriers and cognitive challenges, particularly if same worker (i.e., case worker or outreach).
- Service experiences vary by office location and worker, including triaging within the office and office environment.
- Knowledge training and mental health training is important to maximize staff policy knowledge as well as compassion, respect, sensitivity, and disability awareness.

### Telephone Themes

- Telephone option has limitations for those with literacy issues, both developmental and cognitive, and other barriers.
- Message tree is lengthy and can be confusing.
- Easy and convenient when able to get through to a worker.
- Challenges in connecting with a person and inconsistent information provided.
- Can be cost prohibitive for clients (i.e., phone service costs and consumption of minutes).

CONFIDENTIAL

### Other (email, mail, fax) Themes

**E-mail:**

- Convenient communication option but limitations with security and confidentiality and requires email account/access.

**Mail:**

- Mail is generally reliable and provides client physical document for reference.

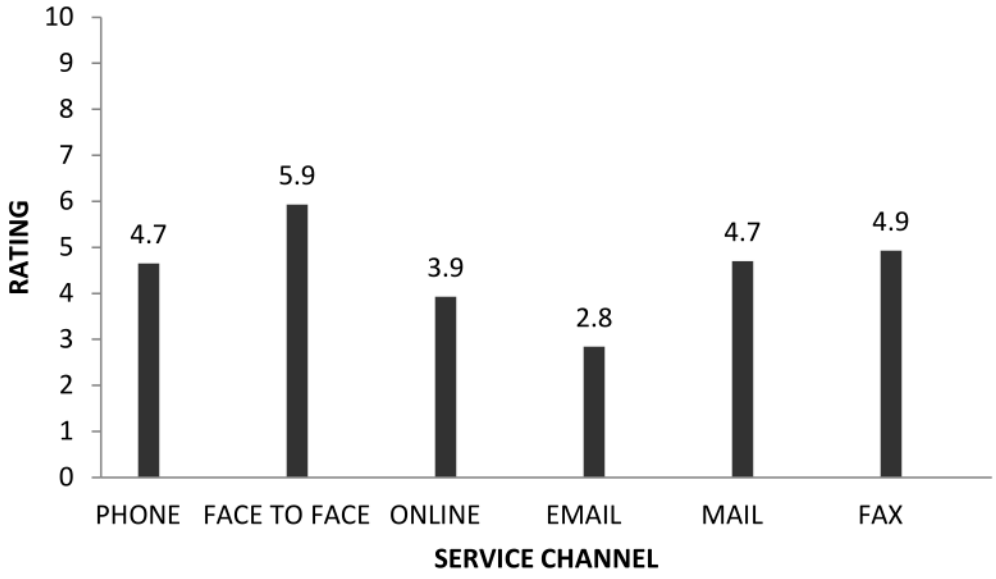
**Fax:**

- Provides paper-trail but can be cost prohibitive for clients and effectiveness and efficiency is dependent upon administrative processing.

### Levels of satisfaction with current service delivery channels

At the end of the discussion, participants were asked to rate their level of satisfaction with each service delivery channel on a scale between 1 and 10, where 1 was the least satisfied and 10 was the most satisfied. As demonstrated in Exhibit 1, the channel receiving the highest rating was face-to-face. Interestingly, this is the channel that also received the most feedback on opportunities for improvement. Of all of the channels, this is the one that is most preferred and the one the clients would like to see improved. Providing another option, the online channel, may help improve face-to-face experiences by reducing the volume of clients coming into the office.

**Exhibit 1: Current satisfaction ratings based on an average of all scores[a]**

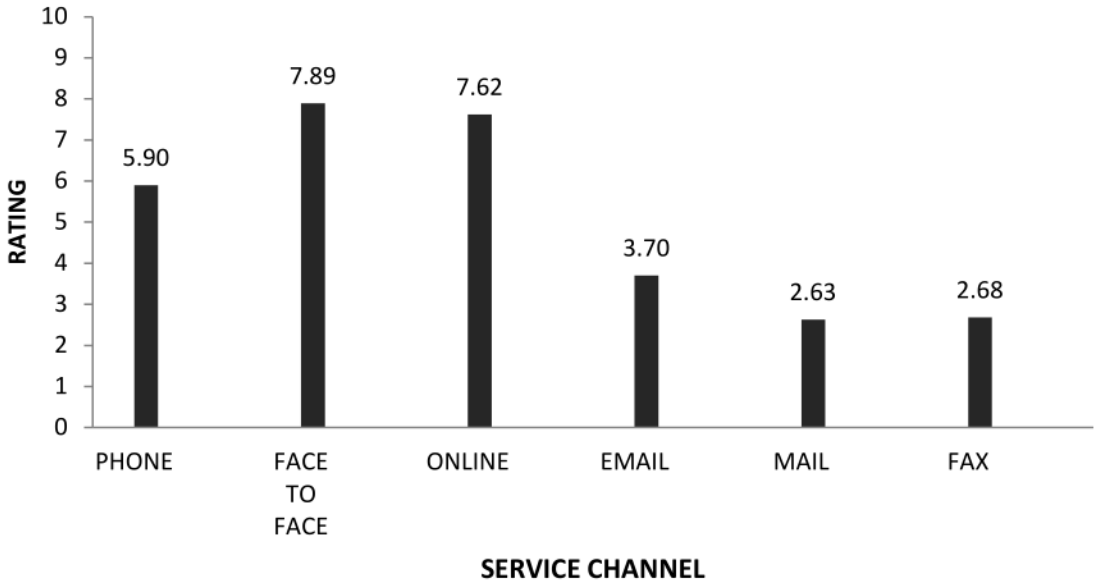



[a] These ratings do not include the first Vancouver session or the session in Surrey because clients were not asked to rate their satisfaction for these channels. Results for email, mail and fax do not include the last Vancouver session because feedback for these channels was aggregated as 'other' for this session.

### Predicted use in the future

At the end of the session, clients were asked to respond to the following question: "On a scale between 1 and 10, please rate each service delivery channel on the likelihood that you will use it in the future." Exhibit 2 provides the average across all 7 sessions. Based on this feedback, the two preferred choices for clients in the future will be face-to-face and online. Phone use and the 'other' channels (email, mail and fax) received lower average responses.

**Exhibit 2: Client likelihood to use each service channel in the future based on an average of all ratings**




CONFIDENTIAL

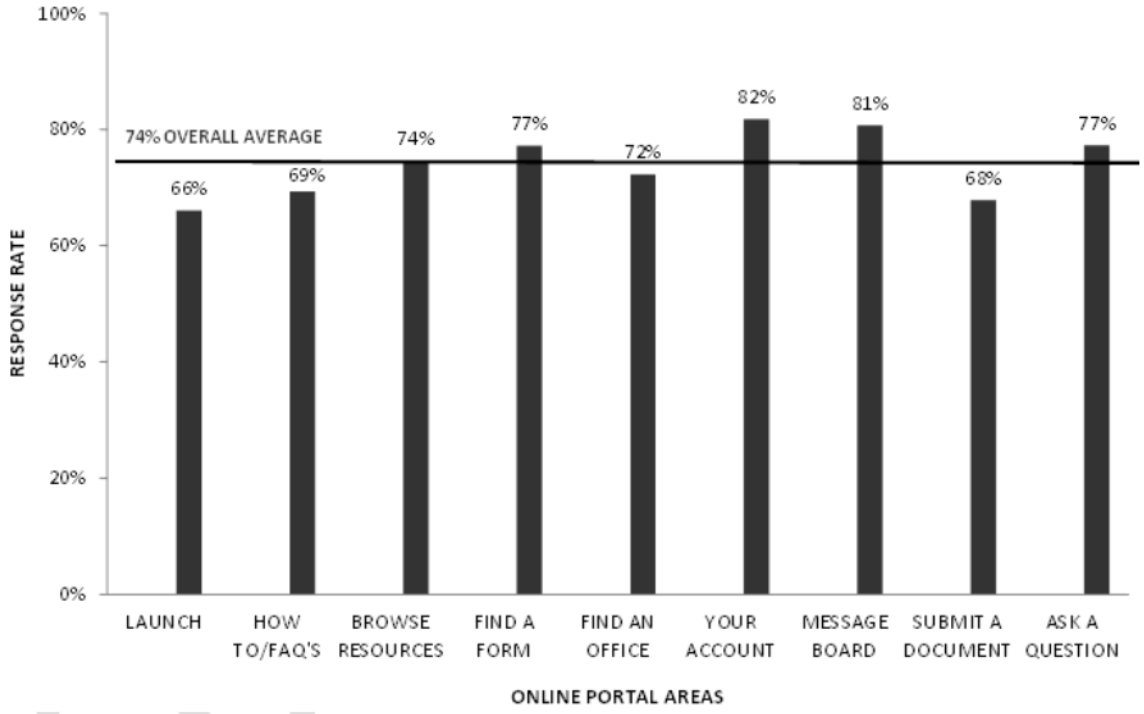
## Client Feedback on Online Channel – Client Portal

After a presentation of the Online Client Portal prototype, clients were asked to provide feedback on each function and asked the following: would they use it; what do they like about it; and what would make it better? This section contains a summary of the themes that emerged from across all seven sessions. A detailed rollup of the comments received can be found in Appendix 4.

### Would You Use It?

Most clients are looking forward to being able to use the client online portal. When asked whether they would use each function, 74% of clients said yes (see Exhibit 3).

**Exhibit 3—Responses to "Would you use It?" for each function**




### What do you like about it?

**Overall:**

- Clients see the online portal as empowering, enabling them to get things done on their own without having to come in to the office or call someone.
- They liked the overall look and feel of the portal, particularly how simple, user friendly and clean it looks.
- Having an online option is seen as improving accessibility and providing an opportunity for clients to avoid some of the challenges they currently face with the other service delivery channels.

- A few clients noted that this option will allow them to avoid the costs associated with travelling to the office or the cell phone charges associated with calling the office.

**Specific functions:**

- Clients liked virtually all the features they were shown, although they were most positive about the Message Board and the My Account page.
- Clients generally appreciated the ability to see what resources are available to them, but would like to see an increase in the number and variety of resource links and information, including links to job sources, food banks, housing, advocacy organizations, low income housing, medical, dental, outreach services, and so on.
- Clients were excited about the potential for being able to find forms online, and encouraged the ministry to expand this service to include as many forms as possible and to allow for completing and submitting them online.
- Several clients mentioned that they like the ability to view a document's submission history so that they could keep track of the document and its status.

### What would make it better?

- Several clients mentioned the need to ensure the portal was accessible for those with visual or hearing impairments.
- A few clients suggested the ministry should ensure there are links throughout the portal to allow for easy access to a different page.
- To help clients that need it, they would like the ministry to offer a tutorial or some sort of help function or video/demo clip.
- A few clients said they would appreciate the ability to fully interact through voice recognition.
- At least four clients noted their desire to filter the list of resources available according to the community the client is residing in. For example, they could enter their postal code so that only those resources and services in their community come up.

### Concerns Raised

- At least three clients expressed concern about their ability to access computers. They didn't own computers and believed it would be difficult to access them in a public location such as a library.
- A few clients said that they didn't know how to use computers and probably wouldn't use the online portal.
- A few clients expressed concern about privacy and security issues. Some distrust electronic communications in general, while others were mostly concerned about the lack of privacy if they only had access to a computer in a public location such as a library.
- A few clients warned that the information available on the portal needed to be kept up-to-date, particularly the information provided on community resources.
- At least three clients said that they would want quick responses to questions posted on the online portal. Without this function the value of the portal would likely be diminished.

CONFIDENTIAL

## Policy Feedback

This project did not seek feedback on ministry policies. Even so, a number of clients provided this feedback during the sessions. This section outlines some of the themes identified.

The policy issues that were most frequently mentioned were related to money. Several clients voiced concerns that their rates or medical benefits were too low. The cost of using cell phones to contact the ministry was also frequently mentioned. Clients would like to see these charges covered by the ministry.

Several clients mentioned that they preferred the ministry's previous caseworker/caseload approach. They felt they received better, more informed and personal service in the past when this was the ministry's practice. A caseworker approach may be particularly helpful for clients with complex cases.

A few clients mentioned that the policy that required PWD clients to have a doctor that has known them for at least two years complete their medical form was impractical because they can't find a doctor in their area that would take them as a patient. Very few doctors accept new patients.

Several clients in the Fraser Region expressed concerns about housing and how difficult it was to find affordable housing and how complicated the application process is.

A few clients were dissatisfied with how long it takes to get funds when first applying for income assistance. They talked about having to wait several weeks when they felt their need was immediate.

A few clients expressed the need for more support to help them find employment, improve their employability and address their various concerns such as child care and transportation. Clients want to know upfront what they may be eligible for, particularly regarding PWD.

## Conclusion and Next Steps

The focus of these feedback sessions was to launch a primary consultation process to support channel development, with support by an ongoing and successively more extensive process to monitor client satisfaction by specific channels.

Reaching out to clients for their perceptions of the current service delivery experience has been a very positive step forward. Clients were very pleased that we took the time to ask them for feedback.

As the ministry moves forward with the Channel Strategy we envision receiving further feedback from our clients and other stakeholders.

CONFIDENTIAL

## Appendix 1: Approach

### Client Focus Group Approach

Seven client focus groups were held across the province:

| Region and Location | Date |
|---|---|
| Region 2: Vancouver | February 13, 2013 |
| Region 3: Surrey | February 14, 2013 |
| Region 4: Kelowna | February 26, 2013 |
| Region 5: Prince George | February 28, 2013 |
| Region 1: Nanaimo | March 12, 2013 |
| Region 1: Victoria | March 13, 2013 |
| Region 2: Vancouver* | March 25, 2013 |

* Follow-up session completed by Ministry of Social Development staff only to increase quantity of feedback and transition to internal facilitation.

In total, 71 participants attended the client focus groups.

Berlin Eaton was contracted to facilitate the initial six client sessions to promote the sessions as arms-length from the ministry.

To provide sufficient opportunity for everyone to share their views, the goal was to have 12 participants in each focus group, representing a fairly broad cross section of clients. The ministry's approach was to select a sample from those clients who lived near the location of the focus group and who had a phone and did not have any alerts on file. The ministry's research branch provided the client lists. As shown in Table 1, the ministry attempted to contact approximately 755 clients in order to get the 71 participants that attended the focus groups. Lessons learned through the process are provided in Appendix 1.

**Table 1: Contacting Clients for the Focus Groups**

| Clients Attempted to Contact | Actually Connected with Client | Clients Verbally 'Confirmed' | Clients Attended |
|---|---|---|---|
| 755 | 319 | 117 | 71 |
| 100% | 42% | 16% | 9%<br>(61% of client 'confirmed') |

A script was provided for the client calls that introduced the Channel Strategy and outlined the purpose of the client focus group session they were being invited to attend. While ministry employees made the phone calls, it was articulated on the call that participation in the session is completely voluntary and in

CONFIDENTIAL

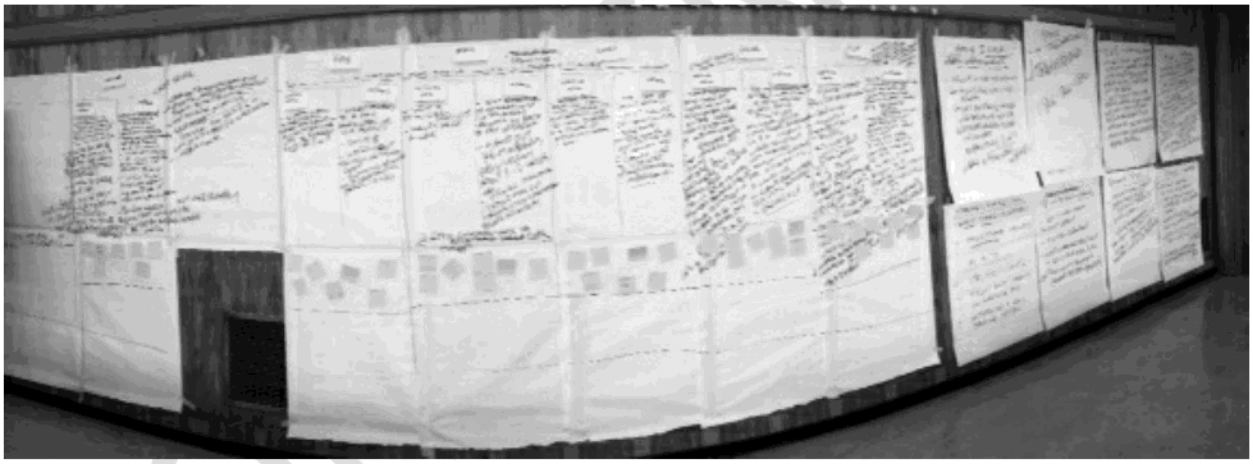
no way impacts the client's eligibility for Income Assistance. The sessions were catered and bus tickets were offered to assist participants with transportation to and from the session if required. In addition to the 71 clients that participated in the sessions, the message regarding the ministry's Channel Strategy was communicated to over 700 clients.

**The Focus Group Sessions**

At each session, there was a team of facilitators/support:

- The Ministry of Social Development's Project Manager attended to ensure continuity and to introduce the Ministry's Channel Strategy,
- The regional Community Relations and Service Quality Manager (CRSQ) attended for regional representation,
- The lead facilitator and a support facilitator.

All comments were captured on flipcharts and transcribed for review by the Project Manager after the session was completed.



Client feedback on existing service channels: Prince George Native Friendship Centre

A copy of the agenda for the majority of the sessions is included in Appendix 2. Each session was scheduled for 4.5 hours (usually 10.00am to 2.30pm). The flow of the day was as follows:

- **Welcome and introductory comments:** The team welcomed everyone to the session and thanked them for attending. They were told the purpose of the session and were ensured of the confidentiality of their feedback.

- **Ministry's Channel Strategy:** The Project Manager explained the ministry's Channel Strategy to the clients and discussed current service delivery channels and some challenges.

- **Feedback on existing services:** For each service delivery channel, clients were asked for their feedback on what is working well and what could be improved. The final task for this agenda item

was to ask participants to rate their current satisfaction with each channel on a scale between 1 and 10, where 1 was the least satisfied and 10 was the most satisfied.

- **The online module:** The Project Manager provided a presentation on the ministry's existing online resources that included main ministry web pages, online application tool, and Online Resource (OLR), and then walked through demos of the Online Client Portal prototype, as the portal is currently under development by the ministry. Following the presentation, clients were asked to provide feedback on each portal function according to the following questions:
    - Would you use it?
    - What do you like about it?
    - What would make it better?
- **Planning for the future:** Having seen the online portal future service option, participants were asked to rate, on a scale between 1 and 10, their desire to use each channel in the future.
- **Closing remarks and session evaluation:** Participants were thanked for their participation, were asked to complete a post-session evaluation and were given a Certificate of Appreciation, signed by the Assistant Deputy Minister.

*The Vancouver Public Library: Venue used for initial Vancouver Focus Group*

CONFIDENTIAL

**Caseload Representation**

While our methodology ensured there were clients from key groups, the sessions were not representative of the caseload.

Of the 71 participants consulted, the following client categories were represented:

- Employable – 19 participants or 26.8% (vs. 26.5% of the February caseload)
- PPMB – 10 participants or 14.1% (vs. 5.3% of the February caseload)
- PWD – 38 participants or 53.5% (vs. 61.9% of the February caseload)
- NEO – 2 participants or 2.8% (vs. 4.7% of the February caseload)
- Unknown – 2 participants or 2.8%

Overall, at least three participants were immigrants/ESL.

20 participants also volunteered to be contacted in follow-up to provide further feedback on the Channel Strategy project.

There is some bias inherent in the research methodology: for example, participants were contacted by phone, so those without phone numbers on file were not included. Clients with alerts on file were also excluded to ensure the health and safety of all participants. However, venues were specifically chosen for their accessibility for persons with disabilities, to support broad participation. Other potential sources of bias include:

- Self-selection bias – people who attended may be different from those who chose not to participate (or confirmed but did not show up)
- Geographical bias – clients were selected from a random pool of clients within a given distance of the venue in consideration of travel time and requirements, so those in remote / rural areas were not included

CONFIDENTIAL

## Appendix 2: Focus Group Agenda

**Agenda**

| Time | Agenda Item | Lead |
|---|---|---|
| 10:00am | Welcome and introductions | Berlin Eaton<br>Terri Archer, Ministry's Project Manager<br>CRSQ |
| 10:30am | Introduce ministry's Channel Strategy | Terri Archer, Ministry's Project Manager |
| 10:.40am | Understanding the current service delivery channels from the clients' point of view and opportunities for improvement for:<br>• Phone<br>• Walk In/ Face to Face<br>• Ministry's existing online resources i.e., main ministry web pages, online application tool and Online Resource Online<br>• Fax<br>• Email<br>• Other (Mail)<br>Rate current level of satisfaction with each service channel (out of 10) | Berlin Eaton |
| 11:30am | Presentation of online information (existing ministry website and online resource – OLR) and demo Client Online Portal videos for feedback | Terri Archer, Ministry's Project Manager |
| 12:00pm | Lunch | |
| 12:30pm | Online Portal demos cont'd | Terri Archer, Ministry's Project Manager<br>Berlin Eaton |
| 1:00pm | Planning for the Future (rate value to you of each service channel) | Berlin Eaton |
| 2:15pm | Summary of actions and next steps:<br>• Hand out session survey, and<br>• Invite anyone who would like to stay involved with the project in some way to identify themselves to Terri | Berlin Eaton |
| By 2:30pm | Closing remarks, present Certificates of Appreciation and adjourn | Terri Archer, Ministry's Project Manager |

CONFIDENTIAL

## Appendix 3: Rollup of Client Feedback on Current Service Delivery Channels

### Client Focus Groups Feedback Summary

The following notes were compiled from all of the regional notes. Obvious duplication was removed and replaced with a bracket containing the number of times this comment was made. High level themes were identified for the face to face and telephone channels.

### Online

***Working Well***

| | |
|---|---|
| • For basic information computers are easier and good, particularly if sick or physically unable, to save going out, but you need to know where and how to look. Helpful links include cheque issue dates, list of what to bring in to office, Employment programs, new bulletins (but bulletins should remain accessible)**(x3)** | • Computers available at library and ministry, with assistance provided by outreach and employees (**x3**) |
| • Prompts people to print something to hand in which is especially good for PWD/brain injuries | • POVNET is a good advocacy resource |
| • GT Hiring is good link with ministry – helps with finding jobs and clothes | • Can lookup account online and email through account [with portal] |
| • Policy helps, but a lot depends on worker discretion and precedence from appeal | |

***Opportunities for Improvement***

| | |
|---|---|
| • Privacy concerns re: using computers in public areas, i.e., library **(x4)** | • Not everyone has a computer or able to access library (**x3**) |
| • Complex search engine - not user friendly - can only be utilized by experienced users; hard to navigate OLR website **(x6)** | • Focus on improving face to face vs. developing other channels, especially online because computer access is limited |
| • Provide information to clients on what is available online**(x6)** | • Can be difficult for clients and staff to find the correct form e.g. Monthly Nutritional Supplement |
| • Clients not computer literate **(x4)** | • Internet charges/costs is an issue **(x4)** |
| • Does not meet needs of some mental health clients | • Impersonal and dehumanizing experience |
| • Some office computers don't work or are broken | • Useful for initial application and job search |
| • Keep it simple: pick lists, etc. | • After following the steps on the online application, tool assessed as ineligible but no explanation why |
| • Can't print some frequently used forms (e.g., request for medical equipment) | • Keep website/online resource up-to-date: remove discontinued supplements/items no longer offered) |
| **Self-Serve Assessment and Application (SSAA) Tool** | |
| • Difficulty completing correctly (to submission) and if an error, takes time to fix; confusing; no sent receipt; applications lost in the system; turned to an advocate for help | • More information on process, rights and responsibilities; better information so clients can make informed decisions |
| • No online option to communicate with ministry | • Insufficient info for PWD and difficult to use; doesn't alter eligibility for PWD (**x2**) |
| • Video explaining process, step by step, would be good | • Better explanation of options (i.e., home visits for people too sick to come into office) |

CONFIDENTIAL

## Face to Face

### *Working Well*

| | |
|---|---|
| • Got good/excellent, kind, patient service **(x8)** | • Advocate with client works well **(x4)** |
| • Faster response, including file update **(x4)** | • Get more respect than over the phone **(x4)** |
| • Can articulate problems more clearly—better able to communicate **(x4)** | • Workers are able to identify things clients are eligible for, but not receiving |
| • Outreach Workers:<br>o Can get things done quickly/same day **(x4)**<br>o sent to the ministry office vs. getting help | • Majority of workers in the ministry are fantastic, respectful and helpful:<br>o Doing their best but some knowledge gaps |
| • More personal and engaging; better positioned for problem solving, discussions and planning as well as gauging reaction --sense that someone cares, which technology doesn't provide **(x9)** | • Forms:<br>o Get forms in faster as well as filled in faster by doctors (submitting), rather than mail<br>o Staff assisted with forms (bank account) so client not required to line up in future |
| • Drop off in drop box works well | • Coalition to end homelessness is working well |
| • CMHA approach is good. Able to access a worker quickly and get served immediately | • Different office setups work to different degrees for clients (**x5**) |

### *Opportunities for Improvement*

| **Office Wait Times** | |
|---|---|
| • Long waits at some offices **(x3):**<br>o Waiting outside an issue<br>o Larger facilities to allow indoor waiting<br>o Difference in wait times at offices – balance so service is consistent<br>o Provide continuous services vs lunch time breaks or limited meeting time available for one-on-one (i.e. morning only option) **(x2)**<br>o Understaffing leads to long waits (**x6**) | • Front line triaging (**x3**):<br>o Multiple waiting areas for different client groups (**x2**)<br>o Get better @ triage: determine simple vs. complex issue and whether a program specific worker is required<br>o Better direction as to where to go |
| • Lengthy wait time for PWD payments (i.e. 4 weeks) to start **(x3)** | • Provide a drop-off facility to cut down on line-ups |
| **Staff Conduct** | |
| • Important for staff to:<br>o remain polite, sensitive and non-dismissive **(x3)**<br>o be knowledgeable and let clients know what they are eligible for **(x3)**<br>o be "people people"; people skills and have stress management skills **(x5)**<br>o do not make assumptions | • Service varies by office, and even within office/by worker |
| • Only go in as a last resort | |
| **Staff Knowledge** | |
| • Unaware of how to manage some client issues (e.g., advocate card recognition) **(x3)** | • Better trained security staff to help direct people to where they need to go and make a more personal connection as client standing in line? Build rapport. **(x2)** |
| • Knowledge gaps **(X1)** | • Inconsistent interpretation of legislation |

CONFIDENTIAL

| Client Knowledge of Services | |
|---|---|
| *Communication* | |
| • Explain what is available **(x4);** provide booklet outlining what is eligible/available for PWD (i.e., dental) **(x4)** | • Can be difficult for a client to clearly articulate/ask questions that identify what service/supports are available **(x2)** |
| • Provide Information Sheet/brochure on rights and responsibility (clear list of procedures) | • Which agencies will help people file [income tax] for free |
| • Services available e.g., drop-off boxes | • Availability of advocates |
| • Power imbalance, word of clients against word of workers | • Itemized breakdown of what's on cheque |
| • Ensure option to speak to supervisor/appeal to higher clearly known to clients | |
| *Caseload Methods* | |
| • No continuity of care | • Case worker approach was better (**x2**) |
| • Caseload approach is best | • Dedicated workers (file updates once a year) who know what is going on, would work better i.e., Before (1986): connected with trained social worker for PWD **(X2)** |
| *Privacy* | |
| • A simple task like picking up a cheque takes several minutes to read the whole file; long-waits:<br>○ Affects privacy and dignity<br>○ Does every worker need to know my file/history? **(x6)** | • Set up in some offices has changed multiple times:<br>○ Now have to set up an appointment to get privacy with a worker in a booth<br>○ Face to face access decreased by 50%<br>○ Privacy face to face decreased 100%<br>○ Lunch time decrease by 1 hour a day. |
| • Lack of privacy when discussing needs at front desk. No option for a private discussion. Front desk staff do not appear to be qualified. | • Hard to disclose literacy issues in person |
| *Families with Children* | |
| • Taking kids into the office is a challenge | • Single parents with kids should be priority in office |
| • Make a place for kids to play in the office. Keep them occupied. Reduce stress for everyone. Like the food bank has. | |
| *Service Delays* | |
| • Delays for PWD clients can be serious, i.e., mental health | • Frontline staff need to be able to make a decision quickly vs. having to defer to someone else e.g., PWD and children need help faster "emergencies" **(x3)** |
| • Emergency service facility, e.g., medical issues took 3 months to get paperwork/decision | • Damage deposit can take 5 days which means that client is put at risk of losing the place |
| *Other* | |
| • Consistent service provided with advocate presence **(x3)** | • Service varies depending on time of month (**x2**) re: cheque issue versus one week into month |
| • Safety issues at lineups **(x2)** | • Access to offices; transportation costs (**x2**) |
| • Inconsistent approach to advocates from office | • Clients recognize stress on staff |
| • Staff should try to clear 'flagged' issues earlier in the month: Clients should get a warning earlier | • Staff should provide contact # when referring clients |

CONFIDENTIAL

| | |
|---|---|
| • Limitations for those with literacy issues: both developmental and cognitive issues | • Anxiety results when called into the office and not given reason, feels punitive |
| • Repeating problems multiple times to different people | • If outreach can give good service and get client off the street, why can't office? |
| • Need to know about advocates | • Felt misinformed about a long term care facility |
| • Crisis Grants requested, get a Thrifty's voucher; would like the option of getting cash | • Focus on improving face to face vs. developing other channels, especially online because computer access is limited |
| • Connecting with the wrong people at first point of contact secretary vs. social worker | • ACT Team: People get access to allowances we (people not on disability) don't: seems unfair |
| • Too confusing to get pain medication covered | • Develop simple websites for covering eligibility |
| • Want an internal Ombudsperson | • Doctors have challenges navigating eligibility |
| • Make more forms available in the office. *(On brochure rack or similar)* **(x2)** | • Non-medical person seems to be overruling medical decisions based on what can be covered |
| • Eliminate phone call completely and make appointment at the office (for application process) | • Not sure how much discretion workers have – would like to know **(x2)** |
| • Education documentation turned down due to timing (too old); not sure why, worker error or discretion? Power discrepancy makes it hard/sensitive. | • Worker didn't explain needed more documents and got letter later that scared client; communication **(x2)** |
| • Layout of office:<br>  ○ Counters don't work for people in a wheelchair; even at lowest level, a client cannot see over it<br>  ○ Wickets are sending the wrong message | • Disability awareness – i.e., be at eye level and don't pet working dogs |

## Telephone

### *Working Well*

| | |
|---|---|
| • Some workers are good at working with advocates; they keep notes **(x2)** | • More polite workers, no queue pressures, positive experience **(x4)** |
| • There's a call back option; saves time **(x3)** | • Phoned once and got help right away**(x4)** |
| • Being able to call Monday before cheque issue to find out if I need to go in on Wednesday | • Easy for the dentist to access approvals for dental work via phone |
| • 1-800 gives me an option to connect with a local office | • Extremely professional and expedited care- (Dedicated case worker and disability claim) |
| • Prefer to phone vs. going into the office; more convenient and essential when not able to go to the office in person (**x2**) | • Medical processes. Jumping through hours to get orthotics, took months. In general, the medical process is very complex and difficult to navigate. |
| • Found it easy. Entered info, got a call within ½ hour. Went in to meet worker and managed the disability eligibility process with them. | • When you get a direct line, it's good; things get solved |
| • Dedicated Case worker was great | • Phone PID Card# is good, all automated |

### *Opportunities for Improvement*

| **Difficulty Reaching a Worker** | |
|---|---|
| • Being disconnected after waiting: 1.5 hours and have to call back **(x6)** | • Hard to get through, no/call backs if you don't have a phone it's a problem (**x2**) |
| • Phone: hard to reach to a worker; get the run | • Inability to contact local office directly resulted in |

CONFIDENTIAL

| | |
|---|---|
| around sometimes, lack of info, different person every time; repeating yourself; feel like you're not listened to; by 3rd person, you aren't at your best either | delay in being able to discuss specific issue |
| • No replies from staff **(x3)** | • No feedback from staff on particular issues **(x2)** |
| • Got through on the phone and told to come into the office – distance and mobility issues | • Waiting for a phone call is the biggest problem, can take weeks to connect (**x2**) |
| • Inconsistent service creates challenges, which doesn't work for immediate needs | • No staff name provided to client – no accountability |
| • Not available on weekends or after 4pm | • No ability to talk to a person – only fax and email |
| • Message tree is long and confusing. Needs to be simpler **(x6)** | |
| **Cost to Client** | |
| • Pay and talk: wait = waste of $ because of cell phone charges **(x6)** | • Bus pass is cheaper than airtime so prefer face to face. **(x2)** |
| • Local cell phone call may be rerouted to another city or the US resulting in high phone bills. 1-866-866-0800 **(x2)** | • Would like an option to be able to call collect |
| **Staff Conduct** | |
| • Need more consistent quality of service (i.e., should not depend on the worker)**(X1)** | • Clients vulnerable; a negative conversation can have a real impact |
| • Would be good to have a nice voice on the other end | • Clients afraid to call workers |
| • Just be professional (mentioned several times) | |
| **Limitations** | |
| • Access to phones:<br>○ Not everyone has a phone (assumption is everyone has a landline)<br>○ Could redirect funds for phone to computer access<br>○ Pay as you go cell phones (minutes get used up) | • Ability to use phones:<br>○ literacy issues: both developmental and cognitive<br>○ poor hand functions – too many options on the phone<br>○ not an option for non-verbal clients<br>○ Bad reception – hard to hear, if person is hard of hearing, it can be a nightmare |
| • Don't answer phone calls if they don't recognize the number (no caller ID given) | |
| **Service Issues** | |
| • Ministry should market direct deposit, e.g. send reminders via mail annually that direct deposit is an option **(x2)** | • Lack of disability awareness; key questions to identify individuals so clients aren't struggling (family/ advocate/caregiver phoning on behalf of client – record on file) – be understanding (**x2**) |
| • After a discussion and waiting, still have to go to the office | • Multiple phone calls and inconsistent messages from different people |
| • Asked to go to different office based on postal, which is farther away and harder to reach | • Missed a month of cheques because of missed calls |
| • Provide staff better training to manage processes | • Need faster service |
| **Other** | |
| • Inefficient to get a call to arrange for a call | • Would like an option to make/get an appointment for a call |

CONFIDENTIAL

## Email

### *Working Well*

| | |
|---|---|
| • Good for asking for information where it's not appropriate to call a worker: e.g., those that have power of attorney can get information | • Timely and very useful when needed (though requires some computer skills) can re-read email |
| • Same day response possible from some organizations | |

### *Opportunities for Improvement*

| | |
|---|---|
| • Not as secure or confidential; also dependent on personal computer set ups and Firewalls, etc **(x4)** | • Would like to be able to use it – would be more efficient **(x3)** |
| • Not aware this is an option | • Can be used to side step other channels |
| • An error or more clarity could still result in having to go into an office | • Limitations for those with literacy issues: both developmental and cognitive issues |
| • No timeline or certainty of response | • Impersonal |

## Fax

### *Working Well*

| | |
|---|---|
| • Works well when forms need to be sent in eliminates line-ups and energy especially for PWD | • Sent in BC Housing application and worked OK<br>○ Doctor's supplement<br>○ PWD application worked OK |
| • Get quick response when faxed **(x2)** | • Can access through advocacy centers and GT Hiring |

### *Opportunities for Improvement*

| | |
|---|---|
| • Need access to a fax personally or via agency **(x2)** | • Costs money **(x2)** |
| • Not timely; in a pile until they get to it **(x4)** | • Worry about things getting lost; mixed up and concerns about running around with confidential papers = risky **(x8)** |
| • Not convenient if can't acknowledge receipt, etc. Still have to use phone, etc. to confirm. Need a faxed acknowledgement**(x3)** | • Limitations for those with literacy issues: both developmental and cognitive issues |

CONFIDENTIAL

## Mail

### *Working Well*

| | |
|---|---|
| • Can be useful and timely for communications: monthly cheque stub (including stub bulletins), letters, bus pass info | • Get a physical document that can be retained (paper trail) **(x3)** |

### *Opportunities for Improvement*

| | |
|---|---|
| • Not always reliable nor effective - mail can get lost and costs money **(x3)** | • Can communicate via bulletins on cheque stubs but not always timely **(x4)** |
| • If stubs aren't stamped by workers, they aren't accepted. Sometimes get lost | • Limitations for those with literacy issues: both developmental and cognitive issues. |
| • Needs more transparency on direct deposit – payment fluctuates and don't know why - get monthly stub but no explanation why cheque differs monthly | • Mail would be appropriate for regular reminders about various items, e.g., Provincial ID Cards, and use to mail out transition information before milestones |
| • Always go back to fax or drop off | • Send info with cheque (e.g., tax information) |
| • Told nothing else needed but then got a letter saying documents were outstanding (letter was incorrect, no outstanding docs but increased anxiety when already feeling vulnerable) | • Personalize reporting stub; not answering same question every month |
| • Stub drop off: something more | |

CONFIDENTIAL

## Appendix 4: Rollup of Client Feedback on Online Portal

### General Comments

- Concern about access to computers **(x 2)**
- Make sure it's smart phone friendly **(x 2)**
- Would be great to be able to complete the monthly stub online **(x 2)**
- Good information about what is available in the community
- More personable than the government page.
- Ability to fill out forms, online, message board
- Avoids possible conflict that may occur with face to face
- Good for people who can't get to office **(x 2)**
- Some people will need help to use it and won't tend to use it on their own
- Some people never use a computer
- Need to make sure it is suitable for old computers that are slow
- Make people aware of where they can access computers for free: e.g., library, recovery houses, etc.
- What happens if clients can't/don't know how to use a computer? Literacy issues?
- Concerns about privacy and trust will dissuade people from using computers
- Have a dedicated computer not subject to the time limits. (library has 1 hour limit)
- Found online portal to be empowering
    - clients can see their account/payment info (more transparent)
    - can be updated on their case info through their message board and can reply/ask reconnect with ministry worker conveniently as needed
    - can access info (forms, How To's etc.) without help
- Could use portal to post community special events notices
- Recommend including crisis and D&A counselling resources under Browse Resources
- Difficult to find out what is available for children with special needs or where to go for help/info
- How much of the eligibility review process could be done online?
- Will it help save $ to apply to more benefits? Or will it cost money and impact client benefits?
- Recommend scrolling info messages in offices to provide important updates and client messages/updates
- Don't lose information on current website
- Consider surveying clients on use of computers
- Need ministry contact information somewhere on the portal
- Each page should have links to previous pages
- Likes that all links accessible from any page
- Caters to "technically" capable people with resources
- Mental illness prohibits learning/use of computers and computers are cost prohibitive
- Search engine is not good – not user friendly
- To maintain confidentiality, use a case # *(or similar alternative)*
- Website search gets all BC Govt. There is an alternative option where you can find the ministry's through online resources
- We should have a system like CRA for requesting PIN # and managing account
- All Outreach/Advocate centres should be trained to use and pass on skills

CONFIDENTIAL

## Comments by Page

### 1. Launch Page

**Would You Use It?**

- (66%) 39 out of the 59 clients from across the province that responded to this question expressed that they would use the "Launch Page" function.

**What do you like about it?**

- Uncluttered, visually friendly, straight forward (x 3)
- Simple, easy to understand/find (x 3)
- Large buttons (x 2)
- Easy
- No sign in required
- Access from anywhere.
- Large format screen for various vision needs.
- Calendar scrolling too
- Good colours.
- Easier/more comfortable access to a worker
- Nice, neat pack.
- I would help a client use it (comment from advocate attending with client)
- No waiting in line.
- Convenience
- Confirmation immediately
- Accountability
- Talks to us

**What would make it better?**

- Tutorial, help function (x 2)
- Make sure colours and font sizes take visual challenges into consideration (x 3)
- Voice instructions (x 2)
- Workshop/training/tutoring for clients to promote use – like at BC Works, "for dummies" in plain language
- Newsletters: subscribe to a monthly email newsletter.
- Submit stubs online
- Need something about housing
- Link to treatment centres
- Make sure it's legible and use simple language
- Different pictures – ad connotations
- "How to register" – video help
- No colour on bottom menu – could use clearer icons
- Make clear what acronyms mean (FAQs).

CONFIDENTIAL

- Too many graphics may take long time to load on slower computers. Functionality more important
- More quick links to resources, especially to resources page; job sources.
- Does calendar link with Google calendar?
- Can we add a texting capability for mental health clients?
- Hover text to voice.
- Improve search
- Spell check
- Hover cursor with answer
- "You Tube" clip on how to use this portal—orientation for non-computer user

**2. How to and FAQ's**

**Would You Use It?**

- (71%) 42 out of the 59 clients from across the province that responded to this question expressed that they would use the "FAQ's" function.

**What do you like about it?**

- Both video and audio to overcome reading/hearing issues (x 3)
- Don't have to wait in line.
- Get info I need fast
- Like printing and reading – would use PDF
- Would use both at different times.
- Like the image
- Keep important information upfront
- Simple, uncluttered, user-friendly
- 3/7 would use videos
- Avoids duplication and likely addresses common questions.
- It's specific to the question you have

**What would make it better?**

- Fully interactive, such as responding to verbal questions (x 2)
- Multi-lingual, subtitles for multiple languages (x 2)
- Make sure it's suitable for people with visibility or hearing issues (x 2)
- Include a specific tutorial for each form.
- Needs voice recognition for those who have a hard time with spelling/reading
- Spell check
- If video, presenter shouldn't have a beard or moustache because of need to be able to read lips.
- Videos shouldn't be the only option for key information
- Bigger font
- Be able to ask a question/let ministry know about a question for FAQ inclusion
- Link FAQ answers to clients' Message Boards.
- Sort, as well as Search filter: PWD vs. standard services.
- Video under 3 minutes

CONFIDENTIAL

- PDF – needs images
- Form linked w/video - link back and forth
- Too crowded/ search function

**3. Browse Resources?**

**Would You Use It?**

- (76%) 35 out of the 46 clients from across the province that responded to this question expressed that they would use the "Browse Resources" function.

**What do you like about it?**

- Community specific resources (x 2)
- Ability to search based on your current location (x 2)
- Good information about resources you might need (e.g., food, work, etc.)
- Locations for food handouts, clothing and other important info for clients: shelter, women in crisis, etc.
- After hours number.
- Community specific event notices.
- Day to day updates.
- Find out what is available for children with special needs (e.g., Autism, etc.)
- Simple, not cluttered, user-friendly.
- Make us aware of services available.
- Good information to solve our own problems so don't have to ask anyone.

**What would make it better?**

- Tailor to specific communities (x 4)
- Ability to suggest other helpful resources. (x 2)
- Must keep it up to date. (x 3)
- Connect to other resources, job resources, not just social services. (x 9)
    - Children resources centers
    - Food banks (x 3), low cost groceries
    - Advocate organizations.
    - 211
    - Variety Club
    - Low income housing
    - Medical, dental (x 2)
    - Outreach services
- People to help coach through how to use it.
- If it told you your entitlement.
- Direction on how to get access to paper resources.
- Include explanations as to how the employment counsellor process works in each area = choice/understanding.
- Prominent display of emergency numbers.

CONFIDENTIAL

- Link to forms with other ministries: e.g., the Residential Tenancy Act
- Icon for "ask a question" – what is it? Need better icons, or titles at top.
- Disclaimer – resources to check out, may or may not have capacity
- Sorted and filtered info.

**4. Find a Form**

**Would You Use It?**

- (79%) 37 out of the 47 clients from across the province that responded to this question expressed that they would use the "Find a Form" function.

**What do you like about it?**

- Ability to fill in online.
- Convenient.
- Efficient
- Don't have to go to the office or wait for mail
- Simple to find as compared to current Ministry website
- Free option is good- as opposed to transportation for F2F or using phone.
- Form number is there.
- Don't have to drill down thru multiple pages.
- Can submit instantly
- Confirmation
- Keeping track not using multiple forms of paper.

**What would make it better?**

- Filling in and submitting documents online (without printing). (x 2)
- A way to get a hard copy of the form.
- Narration: How to complete a form.
- Visual: pop up form fields.
- Pay attention to privacy information.
- How much of the eligibility review can be automated?
- Links to forms with other ministries e.g., Residential Tenancy
- Icons are confusing – have titles, need to be more visual, colourful and alive.
- Printing option challenging – want to save on computer
- Filters: 1) PWD; 2) Available to work
- Searches or filter system for forms to take in what you are looking for.
- All forms available, even if only to view.
- Tell us this form is not printable and go into office.
- Spell check capability for filling in
- Good instructions on how to complete

CONFIDENTIAL

**5. Find an Office**

**Would You Use It?**

- (84%) 46 out of the 55 clients from across the province that responded to this question expressed that they would use the "Find an Office" function, **only if the information for local #s (directly to an office) is included**, otherwise only (71%) 39 out of the 55 would this function.

**What do you like about it?**

- Easy to locate an office.
- Time savings.
- Accessibility
- Graphics (picture of the office)
- Saves a trip to the office.
- Keeps us informed.
- Allows personalization.
- Convenient, all info at hand.
- Allow disambiguation of office visits.
- Know actual locations and contact info.
- Good if you are new or move
- Helpful for first time users who don't know locations
- Identifies if there is accessibility/PWD support

**What would make it better?**

- Map for how to get there (like on a smart phone)
- Best office not necessarily closest one within the 'postal code' area.
- Integration with Google maps
- Be able to provide services from any office in the Province.
- Knowing which is local office in larger regions.
- Find the local office "closest" to me: need the right (specific) contact info.
- Phone number with actual local office and not the 1-866#. Won't use it if it doesn't have this info
- Didn't know could go to any office
- Don't like the background colour

**6. Your Account**

**Would You Use It?**

- (82%) 45 out of the 55 clients from across the province that responded to this question expressed that they would use the "Your Account" function.

**What do you like about it?**

- Personal, allows for personalization (x 3)
- Ease of use, click of a button. (x 3)

CONFIDENTIAL

- Time saving, saves trip to office. (x 2)
- I am included in the process, feel empowered, informed and more in control. (x 2)
- Looks pretty good, like layout, quick links. (x 2)
- Trust information more as I am entering it.
- 24/ 7 access.
- Links with Family Maintenance.
- Cheque balance/history
- Hope to get a reply to questions
- Can see the history
- Has got your information
- Critical to the value of the portal
- Calendar option is good
- Keeps us informed.
- Convenient, all info at hand.
- Allow disambiguation of office visits.
- Full disclosure of all information
- Secure info.

**What would make it better?**

- Questions about security. (x 3)
    - How secure will it be?
    - Continue to update security approvals
    - Who has access to my account? How much will be available to whom?
- Being able to divide your cheque
- Link from ministry to your cheques
- Include reminders to submit items. Lots of advanced notice.
- We should have an app for this.
- Questions about security – 3 wrong passwords and it closes down – difficult for mobility/barriered
- Could email be used for general notices?
- Combination alerts one email to check message board
- Explain the icons, what info is
- Short paragraph up top – explains available and purpose and what you can do. A little advanced
- Make sure there are calendar reminders about entering account information (e.g., connect to a calendar.)
- Update automatically based on my file

**7. Message Board**

**Would You Use It?**

- (81%) 38 out of the 47 clients from across the province that responded to this question expressed that they would use the “Message Board” function.

CONFIDENTIAL

**What do you like about it?**

- Readability, simple block design without clutter. (x 2)
- Links to reschedule appointment on my own—available time slots. (x 2)
- Takes away the delays around "Please leave a message."
- Particularly like alerts for messages. (x 2)
- Online chat
- Messages in private
- Can be sent to phone
- Auto – notification text/phone Yahoo
- Like that there is a record
- Does your reply show as sent button
- Easy, straight-forward, something you can manage yourself, self-explanatory (x 3)
- Useful
- Allows secure communication via government server.
- Keeps me informed.
- Two-way communications.

**What would make it better?**

- A reply feature, especially if an error has been made. (x 2)
- Security/privacy suggestions: (x 2)
    - Don't have it windows based, make sure windows aren't open elsewhere when doing work – auto-log out/close.
    - Timer and shuts page after a specific time.
- Can I ask a question through this page? Is there a link?
- Worried about accidental "X" hitting – have a "are you sure?" pop up
- Want to know how fast the response will be.
- Tie in to calendar.
- Connect to cell phone/Google calendar.
- Link to your email or phone so we know when to check it
- Cheque signaled, why?
- Need to explain icons (reply, delete).
- Assumption of computer literacy.
- Ask CNIB about colour scheme.

**8. Submit a Document**

**Would You Use It?**

- (68%) 38 out of the 56 clients from across the province that responded to this question expressed that they would use the "Submit a Document" function.

**What do you like about it?**

- Time and cost savings. (x 3)

CONFIDENTIAL

- Like the view doc submission record, correspondence history/ message board history. (x 3)
- Much simpler
- I would fill out the document online but have some concerns about submitting it online.
- I would use it as long as I am certain of how long it will take for me to get an answer.
- Convenient – accessible anytime.
- Good to be able to bypass office for simple tasks.
- Use for annualized income reporting.
- Get confirmation that you submitted it.
- Wouldn't be able to lose document *( paper copies currently get 'lost')*.

**What would make it better?**

- Might need to scan documents and this can be difficult for us.
- If it could be filled out on PDF and instantly submitted.
- Use a PIN vs. signature for document submitting on line.
- What happens if it is not filled in correctly? How will people know they have done it right?
- Provide a summary at the end to show everything is OK before submitting or correct it.
- Have a copy of form printed when I submit.
- External kiosk.
- If there is a delay, let me know why. Is there something I can do? Office delay? We want a clear service commitment after "send."
- Cheque stub submission.
- Should be a video on how to submit forms
- Wouldn't work when need original doc's.
- Should have a list of docs able to submitted with this method.
- Descriptive paragraph – everything is confidential – little bit larger.
- Larger fonts.
- Make it (Form Page) writeable and put in save feature.
- Need a good computer—potential financial constraint.
- It will help me with my monthly reporting
- Look at EI reporting requirements for example
- Need higher levels of computer skills.
- File Formats? PDF, Images?
- When document is received by the ministry, auto-notify message board to let me know.

**9. Ask a Question Online**

**Would You Use It?**

- (77%) 27 out of the 35 clients from across the province that responded to this question expressed that they would use the "Ask a Question Online" function.

**What do you like about it?**

- Saves time, don't have to go in or use a phone. (x 2)

CONFIDENTIAL

- Clear answers.
- Ask other questions for clarifications.
- Important to have.
- Faster response
- The ability to ask anytime.
- A single answer.
- More specific questions can be asked.
- Like the chat online.
- Chat could be used for technical difficulties w/ site (or for content question).
- Good for non-vital info.
- Set time to discuss – is a good option to have.

**What would make it better?**

- Need service standard and be notified that the question has been received and will be responded to by "X" date. (x 3)
- A fast response, no delays. (x 2)
- Computers available in office waiting rooms to access online portal.
- What is the green thing on chat box?
- Don't like the icons on bottom of chat box.
- Sometimes need unique info for unique cases.
- Line below title needs to be much larger.
- Make sure it is secure coming and going
- Find a way to differentiate between sensitive questions and general ones.
- Ensure response times comparable to in person and phone.
- Might be confusing between this page and message board – make difference clear.
- Ask for someone to call me—incoming call minutes are free.
- Should be tied to every page so we can ask at any point.
- Live chat? Live help?
- Avoid losing questions.
- Be able to pre-categorize questions to identify urgency of response – right person.

CONFIDENTIAL

## Appendix 5: Evaluation and Lessons Learned

At the end of every session, participants were asked to complete a post-session evaluation. The results from each regional post session survey were consolidated to show the overall results of the focus groups administered. The purpose of this survey is to provide cumulative feedback and information to incorporate into planning activities for future sessions and engagements. The information that was consolidated from the regional surveys fall into the following categories:

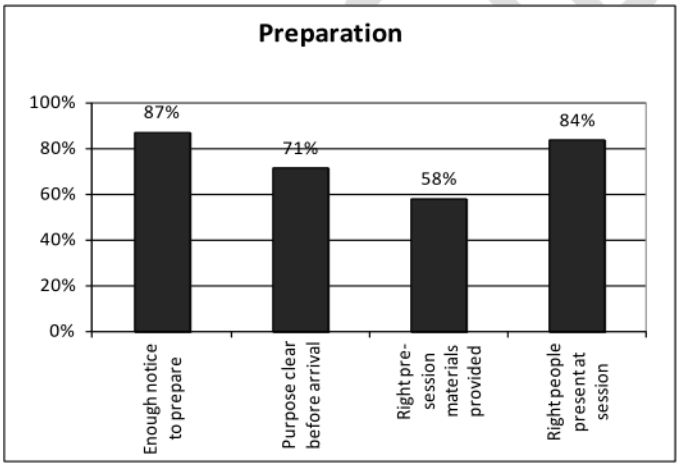
- Overall Score out of 10
- Preparation
- Agenda
- Delivery
- Results

The graphed results report the percentage of respondents that agree (scoring either 4 or 5) to a series of statements related to their perception of how they viewed the sessions. Any scores where less than 80% agree are generally noted for future action.

The total number of responses from all focus group sessions was 48.

The overall score out of 10 was 8.9, or 89%.

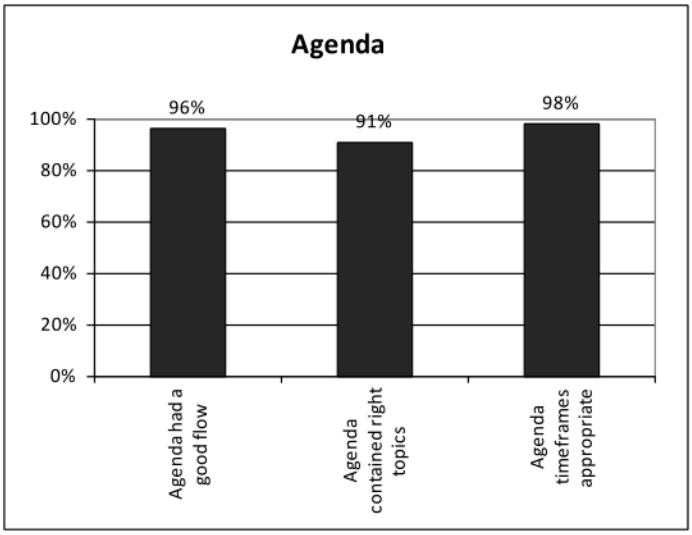
### Survey Responses



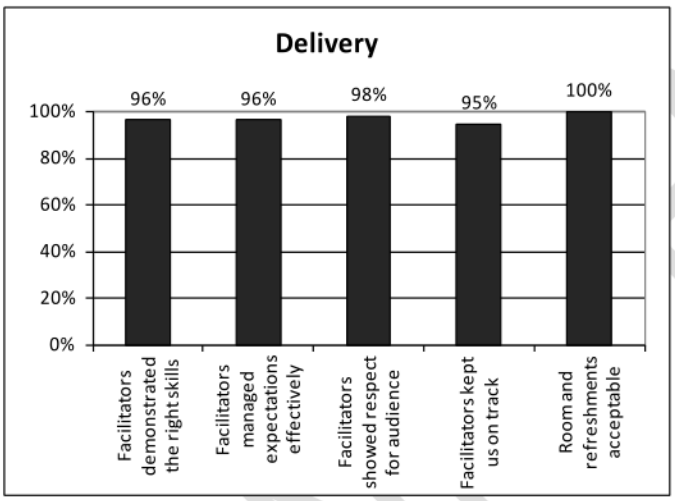

71% of participants were clear on the purpose before they arrived; there may be an opportunity to improve the clarity of the communications prior to the session.

Although only 58% of the clients said that they had the right pre-session materials provided to them, 87% said they had enough notice to prepare. Only a small percentage of clients commented that they wished they had more materials provided to them before the session. It is not clear if this was a concern for them. It is more likely that they were responding to not being provided materials ahead of time, as no materials were required.

CONFIDENTIAL

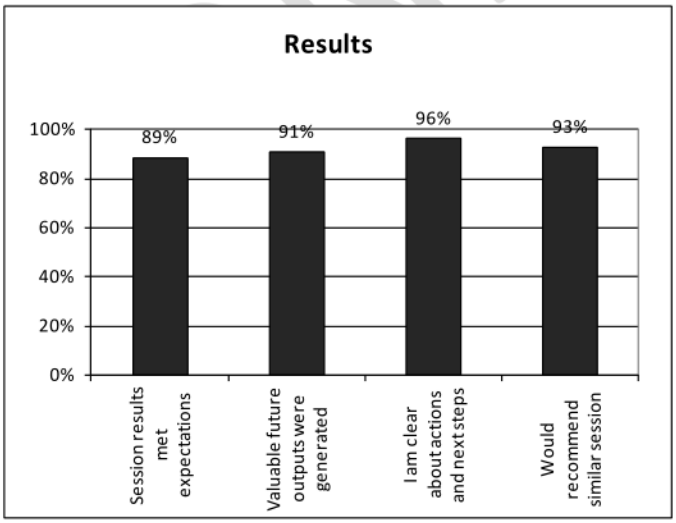



Over 90% of participants were satisfied with the agenda, including its content, flow and timing.




Over 95% of participants indicated that the facilitators:

- Demonstrated the right skills
- Managed expectations effectively
- Showed respect for the audience
- Kept the group on track




Almost 90% of clients said the session met their expectations. Over 90% were happy with the outputs and 96% indicated that they were clear on next steps, while 93% said they would recommend a similar session.

CONFIDENTIAL

## Written Comment Themes

Three open-ended questions were asked and common themes are provided below. A complete rollup of the comments is provided in Appendix 1.

**My most significant learning from this workshop was:**

- The information provided about the online portal was the most significant learning for the majority of participants. Of the 46 comments provided, 23 were about how much they enjoyed learning about the client online portal.
- Other comments were more general in nature, including things like appreciating knowing the ministry is interested in improving services, other people have the same challenges that they do and learning about the different ways to access information.

**Future workshops like this could be improved by:**

- Out of the 39 comments provided, 6 recommended getting input from a larger, more diverse group of people. A couple of participants noted their session contained mainly PWD clients.
- Four people mentioned that they would have liked more time to prepare, and 4 said they would have appreciated a more respectful environment where everyone had an equal opportunity to speak. These comments came from one session where there were a number of participants who were interrupting each other and trying to dominate the conversation.

**Other comments:**

- Of the 34 comments provided to this question, 24 of them were comments of appreciation such as: “thank you” and “great facilitation”.

The following-contains a rollup of all of the written comments provided by participants in the post-session survey as well as the lessons learned by ministry staff in organizing the focus group sessions.

## Written Comments Summarized

**My most significant learning from this workshop was:**

1. New portal and integrating communications and access
2. Online resource.
3. The future of social services with catching up with technology
4. N/A
5. Knowing that (time) was the main priority here on solving problems was critical
6. I like the idea of the new portal – it will work.
7. Online options/my self-serve
8. Accessibility
9. Got a lot of input about things
10. The new website

CONFIDENTIAL

11. Email options
12. That an online option is in preparation
13. The website! - Which would be amazing to have up and running
14. How the website is going to work. Know the questions you can ask. Feel more informed
15. Ministry is trying to do a better job (More efficient)
16. How to log in for information
17. Internet
18. Going online to do stuff instead of going to office
19. That the Ministry is really interested in improving
20. How the system works, they care
21. Everything was very well
22. The Ministry is creating an electronic portal for service delivery
23. Learning more about the SS
24. About the changes being made in the ministry
25. How the system works
26. Input and or from others in session
27. Client portal
28. The look at the future - the sharing of ideas
29. The website - the future
30. That there may be improvements in the system
31. What websites to use and how to find my way around to get the information I need
32. Was the group discussions
33. Informative, interesting.
34. That I am not alone.
35. Things are changing
36. I was given the knowledge to access the new online client portal
37. The intro to Online-Client portal. Avoid waiting in line up!
38. All the info.
39. Finding out that there's online access
40. Confirmation of web portal launch being closer
41. Perspective on other attendees' differing level of relevant skills/knowledge
42. About online stuff
43. The future of computers and access to ministry
44. Learning all the ways to access info
45. All the different types of ways to find the right answers and knowledge was in the class
46. People are/seem to be taking time to learn people's needs and possible make positive changes
47. Hands on, answers to questions

**Future workshops like this could be improved by:**

1. Allow 2-3 minutes (max!) per attendee to give uninterrupted input/opinion for the noted categories (i.e., F2F, phone, etc. likes/dislikes)

CONFIDENTIAL

2. The problems between disability and regular benefits. I find there is so much for disability where when you are on regular. The back to work support sucks
3. Having more people present on regular benefits
4. By clients respecting each other. One person speak at a time
5. N/A (x2)
6. More options on topics to elaborate on and people's turns are considered!
7. Wider, diversified group
8. Keeping the session focused
9. More breaks
10. A larger group of participants
11. More meetings
12. Can't visualize
13. Improvements to the website, like some of the stuff we talked about today
14. Too bad couldn't get more people involved
15. Better hardware (projector, screen, computer)
16. More people
17. More clarity and information about the agenda
18. More policy input
19. More time to prepare for the conference and a clearer understanding of the information needed from me
20. Just keep up the good work
21. The session was fine as it was
22. More input
23. More notice for handouts
24. More information beforehand about topics for discussion
25. It was very nice
26. First one I've attended
27. Giving more information about the session prior to it taking place
28. Shorten the time
29. Letting people know that individual problems are important. But try to stay on task to the problems we are collectively trying to solve
30. Any education is needed for all those computer illiterate
31. More input from others
32. Having more topics to get feedback about
33. Running for several days, to allow for larger sample and broader range of participants (both computer skills and service designation)
34. More break time
35. First time—more of the same/focus groups on other issues also
36. More computer people attending
37. More talk about financial compares about your rights to extra benefits
38. Keeping those talking people in check. Let others have a chance to talk

CONFIDENTIAL

**Other comments:**

1. Good facilitator - Could be more firm in giving group direction
2. I find people on disability get far too many benefits where regular benefits there is very little help that works for me to get back to work (i.e., retraining, obtain things to get work)
3. The clients were talking over each other - they be advised by some guidelines so all clients have a say, instead of one person hijacking the group
4. N/A
5. I thought the session was a great start to a solution!! ☺
6. Finding people who will commit to the full session
7. People with disabilities can't sit too long, need to stretch, can't sit still for that long
8. Thank-you for the treats and lunch
9. It was helpful to share my thoughts of the channels and my personal experiences
10. Excellent group – entertaining
11. Great facilitators! Great room, food and information. - happy to be a part of it
12. Glad we're moving ahead - feel safer now and able to self-manage more - we're working together - feel better
13. Good luck
14. People who are using any Income Assistance would be better served by a more practical "appreciation." Nothing at all makes more sense than a certificate that will end up in the recycling and that won't help me to get a job, etc.
15. Enjoyed it
16. Very pleased, thank-you
17. Some staff was a bit defensive on their fellow workers
18. I would have liked to have clarified the topic of today's meeting so I could have prepared some written comments. Thank you for calling me and asking me to participate. I enjoyed doing this. You may call me again.
19. You all were very clear on all topics
20. Good job
21. Group facilitators were respective and friendly
22. Pleased to have been able to participate
23. Thank-you
24. Thank-you for inviting us
25. Thank-you for having me participate in this project
26. Thought everyone was heard
27. I got a phone call in regards to the group from income assistance in Victoria - happy about this
28. Thank you for all your help
29. The facilitators were fantastic with their presentation
30. I appreciate that the government would be interested in helping to improve people. Caring about people and their needs!
31. Good work ☺
32. Group was PWD-centric. Answers might differ with expected to work

CONFIDENTIAL

33. All sessions/focus groups are valuable. Hope that problems will be heard and solutions brought forward relatively quickly
34. Was very informative

### Lessons Learned

In calling clients to invite them to participate in the focus groups, a number of lessons were learned that could be applied to other, similar ventures in the future.

It was noted that a survey option could have been offered to clients that wanted to provide feedback but were unable to attend the focus group. Similarly, for clients that do have computers, it would have been good to be able to direct them online to learn more about the ministry's Channel Strategy and provide feedback online.

One of the main difficulties staff had in contacting clients was that the phone numbers that were provided on file did not work. In many cases the number was not current, no longer in service, or the cell phone was turned off, likely to control use of minutes. The contact information could have been due, in part, to the timing of the data extraction. Many clients were also hesitant about the process, possibly due to a lack of understanding and/or trust of what was being asked of them. It was suggested that it may be easier to approach clients directly at the office as the purpose and process could be explained more easily face-to-face.

In general, the majority of participants were PWD clients. In the future, if a better balance is desired this would likely require further refinement to the sampling approach.

CONFIDENTIAL