MINISTRY OF SOCIAL DEVELOPMENT AND SOCIAL INNOVATION
RESEARCH, INNOVATION AND POLICY DIVISION
PROGRAM NOTES 2016/2017

TOPIC: Auditor General Report on Persons with Disabilities

KEY MESSAGES:

- The ministry is committed to supporting government's goal to be the most progressive jurisdiction for persons with disabilities and, above all else, considers the wellbeing of the clients it serves.

- We have made many recent improvements to service, we have more underway, and we know we can do even better.

- As there are greater demands on a system of supports for persons with disabilities in British Columbia, and across Canada, the ministry continues to pursue innovations in services for our clients like the Annual Earnings Exemption.

- Through the disability consultation process in 2014, we have also had an opportunity to hear from people across the province—many of whom either receive disability assistance or are familiar with those who do.

- This has increased our awareness of their needs in a way we have never been able to do before.

- The ministry has accepted all ten recommendations from the OAG and has made progress to address the recommendations. For example, in the Fall 2015 the Ministry, in partnership with the Michael Smith Foundation for Health Research (MSFHR), facilitated a dialogue between government leaders, experts in disability research and policy, and non-government organizations (NGOs) that provide disability services in order to help inform the development of an evaluation framework for the Ministry's 'Persons with Disabilities' program.

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- Work is underway to identify the most appropriate measures, the methodology and key partners that need to be involved in developing an evaluation framework.

- The dialogue will assist the Ministry to develop a comprehensive evaluation framework for the disability assistance program.

BACKGROUND:

- In the spring of 2013, the OAG began conducting an audit of the ministry's Persons with Disabilities program and services.
- The audit evaluated the accessibility of the ministry's services; the ministry's ability to demonstrate that eligibility decisions regarding Persons with Disabilities assistance are timely and accurate; and that there is an appropriate evaluation of the ministry's contribution to improving outcomes.
- The OAG's Report was published in May 2014. The Report contained 10 recommendations and the ministry's response.

Summary of OAG Recommendations and Ministry Responses

- The OAG's recommendations to the ministry included:
  - Collecting additional information on clients' needs to improve accessibility
  - Ensuring clarity and accessibility of information about and services for Persons with Disabilities clients
  - Review the Persons with Disabilities application process and develop guidance to assist in completing the application
  - Develop an evaluation framework of the Persons with Disabilities Program.
- The ministry is moving forward with the OAG recommendations.
- Several recommendations are already in progress, including:
  - Administering an online Service Satisfaction Survey to all clients in 2014, for the purpose of seeking additional feedback on client preferences related to service delivery and gathering information on client-driven improvement opportunities.
  - Expanding and modernizing client access, through enhancements to telephony and the development of My Self Serve, an online self-serve client portal.
  - Reviewing the Persons with Disabilities application process.
  - Accessibility 2024, where government outlined its strategic plan to become the most progressive jurisdiction in Canada for persons with disabilities, including 53 commitments over the next ten years.
- For a complete list of OAG recommendations and progress updates, please see Appendix A.

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Select Standing Committee on Public Accounts

- On October 1, 2014 the OAG Audit was presented at the Select Standing Committee on Public Accounts.
- Key issues of concern included:
  - Rates and meeting the basic needs of ministry clients, including quality shelter
  - The growth rate of the PWD caseload and its causes
  - Tracking clients
  - Simple, timely access to services for clients
  - The number of successful appeals, and
  - Appropriate reviews of PWD status.
- A complete list of the OAG recommendations, and the Ministry's responses and progress can be found in the Appendix.

Appendix A:

OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress
1. Collect additional information on its clients' needs and use this to address accessibility barriers for vulnerable clients.	The Ministry has and will continue to build and maintain robust processes at the provincial and local level to engage both clients and advocates. For example, applicants are asked to respond to a voluntary survey when they use the Self-Serve Application and clients are currently being surveyed on their satisfaction and preferences regarding service delivery. In addition, the ministry will continue to hold client focus groups and the new phone and online portal service options will provide clients the opportunity to provide direct feedback with each service experience.	The ministry uses a variety of tools to collect information on client needs and we have used, and will continue to use, that information to address accessibility barriers for vulnerable clients. **Service Satisfaction Survey - 2014** - From March 26 to May 26, 2014, the ministry launched an online Service Satisfaction survey to offer clients an opportunity to provide feedback regarding the ministry's current service delivery as the ministry continually works to improve its effectiveness and efficiency. - The purpose of the survey was to: - Obtain information and feedback on client preferences about various service delivery channels (face-to-face, online, telephone, email, mail) - Identify potential service delivery efficiencies to enhance client satisfaction, and - Determine service satisfaction as a baseline measure with the intent to monitor on an ongoing basis - Respondents were also asked to provide one recommendation to improve ministry services as well as about accessibility of online services, frequency of contact and demographic characteristics. - The Service Satisfaction Survey Summary Report is available publicly at: http://www.sdsi.gov.bc.ca/publicat/pdf/SDSI-Service-Satisfaction-Summary-Report-Oct-2014.pdf - To date, service enhancements have been introduced that relate and/or respond to feedback that includes updating the ministry's 1-866 automated messaging system to clarify options, clients who provide their PID/PIN are able to access self-serve features and entry of this information enables workers to serve clients more quickly. The ministry's toll-free 1-866 line also now offers a call back feature. - In Spring 2014, the ministry launched an online service channel, My Self Serve, which has since been implemented province wide. My Self Serve is a flexible service option for clients that further enables privacy while accessing ministry services and offers registered users the ability to access their personal file information, as well as submit their monthly stub online.

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OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress
		Service Satisfaction Survey - 2016 • In follow up to, and alignment with the 2014 Service Satisfaction baseline survey and building on previous engagement initiatives, the ministry plans to offer a Service Satisfaction Survey in February 22 - March 29, 2016. • In response to feedback received from stakeholders, and to support broader participation this year, the ministry will offer alternatives to the online version (i.e., ability to complete the survey by phone or by paper version, upon request). **MYSS Usability Assessment** • In July 2015, the ministry completed a client usability assessment of its online portal My Self Serve (MYSS), to support client engagement. This research informs the ministry on user behaviour and overall experience on MySS to inform ease of use and future enhancements. The ministry continues to monitor client satisfaction with each of our service channels, through surveys and other feedback mechanisms. **Ongoing Dialogue with External Stakeholders** • The ministry is committed to ongoing dialogue with its external stakeholders about service delivery, and has maintained a robust network of provincial and geographical based meetings and regular communications.
2. Ensure that its online information on PWD designation eligibility is clear and easy to find.	The Online Resource provides extensive transparency regarding policy and legislation, and augments several other information options for clients and advocates. The Ministry will continue to refine the functionality of the tool (search capacity in particular), and improve the clarity and accessibility of information, based on user feedback.	• Information for newly designated PWD clients including information about asset limits and exemptions was comprehensively revised/updated and clarified in April 2015. **Embrace the Internet Government Strategy** • In alignment with the Government Strategy led by the Government Communications and Public Engagement (GCPE), the ministry is working on the development of communication strategies that will serve to better inform clients of the designation and eligible benefits. A significant milestone was the launch of the new government 3.0 website in July 2015. • In moving all ministry content to the new government 3.0 website, the ministry is launching new navigation that is simpler for end users, and all content will meet plain language and accessibility standards by spring 2016.

OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress
3. Review the PWD application process to address the risk that some applicants may not have a family physician, and improve the clarity of the PWD application form. This includes developing guidance to help clients, physicians and assessors in completing the application.	The ministry accepts this recommendation. In conjunction with recommendation #8, the ministry will explore ways to enhance and streamline the PWD application process in consideration of the feedback from the Auditor General as well as input received through the White Paper consultation	• The ministry will initiate a process to undertake a review of the Persons with Disabilities application process.
4. Ensure that front line staff training is relevant, current and addresses topics such as client-centred services, accommodation and working with people who have a wide-range of barriers and disabilities.	The Ministry will continue to provide and build on its training regime that is in place for front line staff. The following training has been delivered to front line staff since 2010; Duty to Accommodate; Mental Health; Active Listening; Recognizing and Reporting Child Abuse and Neglect; Domestic Violence; Diversity; Service Excellence; Violence Prevention; and Advanced Decision Making.	**[As reported in a Ministry Response for May 2014]** The following training has been delivered to frontline staff since 2010: Duty to Accommodate; Mental Health; Active Listening; Recognizing and Reporting Child Abuse and Neglect; Domestic Violence; Diversity; Service Excellence; Violence Prevention; and Advanced Decision Making. **2015 Training for Ministry Frontline Staff** • As of January 2015, 1,177 front line service delivery staff have completed Domestic Violence training. The training was developed by Ministry of Justice, BC Housing and Open School BC and is now provided to all new front line staff.

5. Develop and implement additional strategies to ensure that timely, accurate and consistent services are provided through the toll-free telephone service.	New telephony software is being rolled out across the province in May, providing expanded options including the ability for clients to leave a call back number while maintaining ones place in line, and access to self-serve information. It will also support the establishment of one provincial telephone queue to manage the approximately 1.4 million calls annually, with consistent response times regardless of where in the province the call is initiated. The Ministry will continue the work in progress to improve its telephone services.	• In June 2014, the ministry enhanced its telephone software and clients are now able to access even more of their personal file information 24/7 via self service, including:
		  o cheque amount with a breakdown of benefits
		  o monthly report (stub) status and payment method
		  o create a new Personal Identification Number over the phone with immediate access
		  o instead of waiting on the phone, leave a call back number and keep your place in line
		  o wait-time announcements for callers entering the phone system.
		  o streamlining call options to get people to the right staff person on their first call.
		• The ministry also now has the systems functionality in place to direct deposit crisis grants for those clients determined eligible by telephone.

6. Improve the online application process to	The Ministry will continue to streamline the general Income Assistance process through	**Serve Assessment and Application (SSAA) Enhancements** • The ministry continues to collect feedback about the SSAA to look for

OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress

address redundancies, and improve the clarity of guidance for applicants.	a virtually centralized process. The Ministry will build on these successes, continue to seek feedback from applicants, and endeavour to enhance the generally positive feedback received to date and address issues raised.	opportunities for improvement.
		
		• Effective January 24, 2014, to further support client feedback, the optional SSAA survey began auto-launching once an applicant submits their application.
		
		• January 27, 2014, the Employment Readiness Information Questionnaire was removed from the SSAA. Some employment-related questions still remain on the SSAA for statistical purposes.
		
		• The ministry is continuing to review the SSAA for purposes of further reducing redundancies and increasing clarity.
		
		Applicant Intake
		
		• The applicant intake project concluded in Spring 2014, and a virtually centralized process is now in place. Benefits to applicants include:
		    o Reduced number of required office visits
		    o Minimized application documentation
		    o Elimination of 'no show' appointments, thereby providing more time for dedicated applicants
		    o Implemented accommodation protocols for non-standard intakes (e.g., rural, interpreter-required, no phone, etc.)
		
		In Spring 2015, the ministry introduced a start to finish process for applications with all application steps completed by one Employment and Assistance Worker

7. Work with trusted third parties and Service BC to identify and address physical accessibility issues for clients.	The Ministry is committed to ensuring full physical access for clients. While all sites where the Ministry delivers service are wheel chair accessible, there are a small number of sites where wheelchair access is not viable from the parking area. The Ministry will discuss these specific sites with Shared Services BC and Service BC and where possible, encourage the consideration of accessibility modifications. In addition, the Ministry will add accessibility to the evaluation criteria for future procurement of trusted third party service providers to ensure a transition to full	**Physical Accessibility** • 100% of SDSI offices providing face to face service to clients, are wheel chair accessible. • In addition, over 85% of Trusted Third Party offices (including Service BC) are wheel chair accessible. **Shared Services BC and Service BC Consultations** • The ministry has discussed physical accessibility with Shared Services BC and Service BC, and where possible, encourages consideration of accessibility modifications. **Integrated Front Counter - Victoria** • A new Service BC Centre opened in Victoria to provide better and more convenient access to government services in the capital. The centre is

OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress
	accessibility.	physically accessible. **Future procurement** All procurement for trusted third parties includes criteria regarding physical accessibility considerations.
8. Develop and implement a risk-based approach for reviewing initial and ongoing client eligibility for the PWD designation, to better ensure the program is serving only those clients who are eligible for benefits and supports.	The Ministry has a wide array of mechanisms in place to support accurate PWD decisions, a formal reconsideration process, a complaints process, and a second reading of PWD applications for new adjudicators. In conjunction with recommendation #3, the ministry will explore ways to enhance and streamline the PWD application process to ensure the program is serving only those clients eligible for supports	• The ministry will initiate a process to undertake a review of the Persons with Disabilities application process.
9. Report on the timeliness of eligibility decisions by measuring and reporting results against the service standards.	The Ministry regularly monitors general application timeliness (the number of applications received, average number of days at different milestones in the process and the number of applications outside the service standard) and telephony performance (the number of calls offered, calls answered, and abandonment rate). Applications are triaged so applicants fleeing abuse or within immediate need are addressed first. In addition the ministry monitors and meets or exceeds both the PWD determination standard and the Reconsideration Decision standard on an ongoing basis. The Ministry will explore ways to enhance reporting out on these timelines against service standards.	**Timelines – Eligibility Decisions** • The ministry continues to regularly monitor general application timeliness and telephony performance. • The ministry continues to monitor, and meets or exceeds, both the Persons with Disabilities designation determination standard and the Reconsideration Decision standard on an ongoing basis. **Service Delivery Transformation** • In June 2015, the ministry fully operationalized its provincial service delivery model, standardizing the process for managing requests for service to ensure fairness, consistency and access for all individuals who need our programs. • Ministry clients receive a consistent service and standards across the province based on service priority regardless of how they choose to access ministry services or their geographical location.
10. Develop a comprehensive evaluation framework for the PWD program that: - sets objectives, targets/benchmarks to define what it means to	The ministry actively tracks several key client indicators where data is readily available and will expand this work to develop a comprehensive evaluation framework specific to the PWD program and clients served. The ministry will work	**Evaluation Framework for the PWD Program** • Work is underway to identify the most appropriate measures, the methodology and key partners that need to be involved in developing an evaluation framework. • In the Fall 2015 the Ministry, in partnership with the Michael Smith

OAG Recommendation	Formal Ministry Response (In OAG report)	Current Status/Progress
meet clients' basic needs; - sets standard measures to track whether clients can access appropriate shelter, food and other necessities; - establishes a baseline and targets to measure employment success for clients; and in partnership with other agencies defines, tracks and monitors a range of health and social indicators to assess this broader range of outcomes.	with other key agencies that track health and social indicators to determine if this information can provide the ministry with a better understanding of the population it serves.	Foundation for Health Research (MSFHR), facilitated a dialogue between government leaders, experts in disability research and policy, and non-government organizations (NGOs) that provide disability services in order to help inform the development of an evaluation framework for the Ministry's 'Persons with Disabilities' program. • The dialogue will assist the Ministry to develop a comprehensive evaluation framework for the disability assistance program.

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Developing an evaluation framework:

a generative conversation

January 14, 2016

Submitted by Wynona Giannasi and Jennifer Hystad

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Executive Summary

The Michael Smith Foundation for Health Research (MSFHR) partnered with the Ministry of Social Development and Social Innovation (the Ministry) to facilitate a dialogue to inform the development of an evaluation framework for the Ministry's Disability Assistance Program. This discourse between government leaders, research experts and non-profit stakeholders resulted in options for the Ministry to consider in developing an evaluation framework for BC's Disability Assistance Program. Two specific outcomes for the session were for the Ministry to:

1. Gain advice on options for an effective evaluation framework in the form of a dialogue and a written report
2. Interface with experts that may be able to assist with the development of the evaluation framework

Pre-session interviews were conducted with 10 participants to learn of their expectations for day and preliminary thoughts on client needs and indicators. These interviews provided valuable direction to shape the day. The session itself employed a generative conversations format with an appreciative inquiry approach. Small and large group activities revolved around carefully selected questions to generate ideas and perspectives. The three specific activities that shaped the day were to determine and categorize client needs, discuss evaluation designs and develop outcomes and indicators. The session closed with an opportunity for all participants to provide advice or encouragement to the Ministry going forward.

Four key themes emerged from the session: that the development and approach of the evaluation be client centred, the evaluation be strength-based, the evaluation employ a mixed design, and integrated knowledge translation be utilized to ensure evaluation results are used for quality improvement.
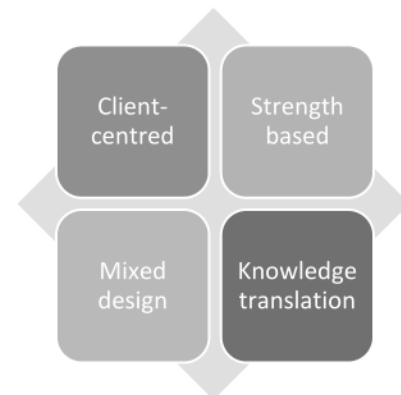
In conversation around **client needs**, participants agreed first and foremost that the evaluation must be client-centred, respecting the autonomy of the client. In this context, there was the desire to have clients involved in the development of the framework, client goals included in the evaluation and the approach to be strength-based. Three general categories of client needs arose: basic needs, administrative needs and system-level needs with quality of life, as identified by clients, as a fourth category underpinning all client needs.

Moving into conversation around **evaluation purpose and design**, participants agreed the overall purpose of the evaluation is to:

- Determine to what extent the program is meeting basic needs (safety, food, shelter, and clothing)
- Improve the acceptability, appropriateness and accessibility of supports (delivered across government) and consider the needs identified by clients, including aspirational goals
- Measure outcomes in each of the categories of client needs

The best fit will not be one approach but rather a mixed design that include utilization focused evaluation (logic modelling) for program outcomes and a developmental approach that will support complex systems-level evaluation. Further, participants identified a need for a program development approach alongside core indicators for longitudinal analysis. There was a strong desire for collaborative learning and shared measurement across government ministries. The group also recommended a contribution framework rather than an attribution framework. Integrated knowledge translation will be key to ensuring evaluation results are used for quality improvement

Building upon conversations around client needs and evaluation design, the third activity explored **outcomes and indicators** at the client, Ministry and system-level. Client level outcomes include stable long-term housing, longitudinal quality of life improvements and high quality social networks. A few examples of indicators include number and percentage of clients with stated goals and plans to achieve these goals, number and percentage of clients safely housed and number and percentage of clients reporting adequate number, depth and quality of social networks.

Ministry-level outcomes involve appropriateness of service delivery, stability in meeting client needs over the long term and coordination of service and knowledge sharing between Ministries. Examples of indicators provided in the session include description of those eligible but not using services, distribution of severity of clients through time, client enrollment with socioeconomic data through time and stability of coordination between Ministries.

At the systems-level, trust, connectivity and healthy partnerships were seen as key outcomes. Examples of indicators include trust and understanding between intersectoral partners, clients having information to make informed choices, easier navigation for clients (as a result of increased connectivity) and less redundancy in what is being asked of clients.

At the end of the session participants were asked to share their advice and encouragement to the Ministry as they embark on developing an evaluation framework. First and foremost, participants expressed they were encouraged by the respectful conversations that centred on client needs and they were pleased with the interest to enhance collaboration and integration between partner ministries and organizations. Participants were pleased with the diversity of ideas put forward, and all participants expressed their desire to continue working together to support the development of an evaluation framework. Key take away messages include:
- There is an opportunity to do something innovative by bringing such a diverse group together and thinking about culture, the system and measurement
- Embrace failure and learn from it
- Recognize the heterogeneity of the target population
- Strive for continuous improvement
- Conduct the evaluation with a series of smaller evaluations to ensure "we don't get lost in the complexity"
- There is a true need for collaboration between ministries to develop a meaningful evaluation framework
- A combination evaluation approach/design is needed

With respect to next steps, after the Ministry reviews this document and reflects upon the dialogue the Ministry may:

- Seek additional input from specific content experts, including collaborating with other ministries, for resources that will support the development of an evaluation framework. Working groups may be an appropriate avenue to consider to streamline discussions.
- Select the evaluation platform/approach
- Engage persons with disabilities and their networks to hear what client needs are so they may be reflected in the evaluation framework
- Consider conducting an in-depth needs assessment to provide input into baseline data to inform the evaluation framework

Introduction

The Auditor General of BC conducted a review of the Ministry of Social Development and Social Innovation's (the Ministry) Persons with Disability (PWD) program in 2014. Ten recommendations were put forward in the report, '*Disability Assistance: An Audit of Program Access, Integrity and Results*'[1]. One of the recommendations called for the development of a comprehensive evaluation plan with clear, measurable indicators to track the progress and success of the program over time. Specifically, the Auditor General's report recommends that the evaluation framework:

- Sets objectives, targets/benchmarks to define what it means to meet clients' basic needs
- Sets standard measures to track whether clients can access appropriate shelter, food and other necessities
- Establishes a baseline and targets to measure employment success for clients
- In partnership with other agencies, defines, tracks, and monitors a range of health and social indicators to assess this broader range of outcomes

Impetus for the session

In response to the Auditor General's recommendations the Ministry approached the Michael Smith Foundation for Health Research (MSFHR) to hold a dialogue to support the development of an evaluation framework for the PWD program. On November 10, 2015 a dialogue was held in Vancouver between government leaders, experts in disability research and policy, and non-government organizations (NGOs) that provide disability services.

Session Purpose

The purpose of the session was to facilitate a dialogue to inform the development of an evaluation framework for the Ministry's PWD program. Two specific outcomes for the session were for the Ministry to:

1. Gain advice on options for an effective evaluation framework in the form of a dialogue and a written report
2. Interface with experts that may be able to assist with the development of the evaluation framework

Through generative conversations with participants, the intention was to hear ideas and perspectives and consider questions to inform the Ministry's evaluation framework. It was anticipated, and clearly communicated, that the session was the start of more conversations to come with stakeholders. The intention was not to develop the evaluation framework or to arrive at consensus, but rather to identify ideas and trends that emerged from the discussions to help inform the subsequent development of the evaluation framework by the Ministry.

At the outset of the session, Ministry participants also expressed their desire to uncover what indicators could be measured in a timely manner, and how client outcomes could be evaluated on a long-term basis, to account for a continuum of (individualized) needs as clients mature within the system. There was also a willingness to develop shared indicators across other government ministries as a way of evaluating the systemic contribution to client outcomes.

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[1] Disability Assistance: An Audit of Program Access, Integrity and Results, Office of the Auditor General of British Columbia, May 2014.

Background

About the Ministry

The Ministry of Social Development and Social Innovation focuses on providing British Columbians in need with a system of supports to help them achieve their social and economic potential. The key responsibilities of the ministry include:

- Provision of income assistance to those in need
- Delivery of employment programs and services to unemployed or underemployed individuals
- Support for community living services that help adults with developmental disabilities and their families develop connections and inclusion with their community
- Support and encouragement for social innovation and social entrepreneurship to improve social outcomes for all British Columbians

The Ministry is also responsible for leading the implementation of Accessibility 2024, the government's 10 year action plan to make BC the most progressive province in Canada for people with disabilities. The Ministry is guided by three key pieces of legislation: the *Employment and Assistance Act,* the *Employment and Assistance for Persons with Disabilities Act*, and the *Community Living Authority Act*.

One of the Ministry's goals is to support British Columbians in need who have disabilities by providing an effective system of support to gain and maintain meaningful independence and inclusion in their community.

The Ministry's disability assistance program is designed to assist vulnerable individuals whose disabilities leave them financially dependent. It is usually the main source of income for these individuals providing them with income to support basic living and health needs.

Existing evaluation

The Ministry currently collects a wealth of quantitative information, concentrated on employment. While the Ministry is able to longitudinally track clients, there is an opportunity to fully examine the *impact* of its employment programs. As identified in the Auditor General's report there is also an opportunity for the Ministry to evaluate health and social outcomes. There is both a need and a desire from the Ministry (and partner stakeholders) to develop more qualitative client-centred outcomes to understand the impact of the program at the client, Ministry and system level.

About the Michael Smith Foundation for Health Research

MSFHR empowers British Columbia's best and brightest health researchers to pursue world-class innovation and stretch the bounds of what health research can achieve. The Foundation helps BC's health research community discover solutions to our greatest health challenges; connect knowledge and action on provincial priorities; and engage partners to improve the research enterprise. MSFHR's strategic direction includes responding to priority research needs including home and community care, influenza vaccination policy, the integration of primary and community care and evaluation of BC's disability assistance program.

Approach

Participants

Twenty individuals participated in the session, including leaders from NGOs, such as the Disability Alliance of BC and the BC Aboriginal Network on Disability Society; experts in disability research, complex systems and evaluation and in the patient journey/experience; crown corporations/agencies (BC Housing and Community Living BC); aligned Ministries of Health and Child and Family Development; and, the Ministry itself.

Interviews

Interviews were conducted with 10 participants in advance of the session to listen to their expectations for the day, perspectives of the focus of the session, preliminary thoughts on client needs and indicators and to understand how they planned to contribute to the session. The interviews provided valuable insights that shaped the structure of the session.

Pre-reading package

To support a meaningful dialogue participants were sent a pre-reading package that included the following:

- The BC Auditor General's report on the PWD program, including 10 recommendations for action
- The Ministry's 2015/16-2017/18 Service Plan
- A report on prevalence on and severity of persons with disability in BC and across Canada
- The Ministry's caseload statistics (using 2014/15 monthly averages)
- A report on Canada-wide labour market participation among PWD
- National Standards for Disability Services from the Australian Government
- A report on measuring outcomes for People with Disability from the Australian Government
- A Performance Management Framework for PWD from the Government of Alberta
- A Quality of Life Framework from the Government of Alberta

Session structure

The format for the session was developed to enable opportunities for small and large group discussions. The overarching theme for the session was about holding generative conversations – conversations that would generate questions, ideas and perspective – to support the development of an evaluation framework for the Ministry's PWD program. Specific activities were carefully selected to enable participants to hold meaningful conversations and to generate ideas and perspectives. The session began with a presentation from the Ministry, including an overview of the PWD program, how the Ministry arrived at the session, the current evaluation focus and resources, and anticipated next steps coming from the session. Three specific activities followed (detailed below).

Activity #1: Determining and categorizing client needs

To support the development of a common understanding of client needs, participants were asked to discuss what they felt clients need and to then categorize these needs (providing their rationale for the categorization).

Activity #2: Discussing evaluation designs to support the development of the evaluation framework

The purpose of this discussion was to generate conversation around what evaluation design may best suit the PWD program, considering the client, the Ministry and the system. Contextualized from the perspective of what is important to the Ministry, the facilitators provided criteria to use for selecting the most appropriate evaluation approach(es).

Activity #3: Developing outcomes and indicators

The purpose of this portion of the session was to consider how program success could be defined and measured. In addition to their own expertise, participants were asked to consider what they read in the performance management framework from Alberta and the quality framework from Australia to provide insights for BC's evaluation framework. Calling upon the evaluation experts to prompt and ask questions the help generate outcomes and indicators, participants were asked to have two conversations:

1. What would it look like if client needs were met and if their lives were improved – from the perspective of (a) the client (b) the Ministry, and (c) the system?
2. How would we know if client needs were met and their lives improved?

For each session participants were purposefully assigned to small groups to discuss their ideas and then report back to the full group. The session closed with a roundtable opportunity for all participants to provide advice for the Ministry and then hear from the Ministry how they plan to move forward in the coming months.

The overarching theme for the session was about holding generative conversations – conversations that would generate questions, ideas and perspective – to support the development of an evaluation framework for the PWD program. What follows is an overview of the discussions and key take away messages with respect to identifying and classifying client needs, selecting an appropriate evaluation approach and developing outcomes and indicators.

Discussion #1: identifying and categorizing client needs

To support the development of a common understanding of client needs, participants were asked to discuss what they felt clients need and to then categorize these needs (providing their rationale for the categorization).

Key themes emerged from the conversation around client needs:

> ✓ Create a client-centred culture, autonomy of the client is paramount
> ✓ Three general categories of client needs arose: basic needs, administrative needs and system-level needs
> ✓ Quality of life, as defined by individual clients, was identified as a fourth category underpinning all client needs

Autonomy

Inclusivity >	Goals >	Strength-based

Autonomy of the client was described as the desire for the client to be heard, asked what they need and to be part of the conversation toward developing an evaluation framework. The group wanted to see individual client goals included in the evaluation, using a strength-based approach. Recognition of the heterogeneity of the client group was a reoccurring theme to ensure the evaluation framework takes into account the numerous journeys that have brought clients to access the PWD program.

Basic needs

Basic needs were described as the essential elements for safety, physical and mental well-being, including appropriate food, shelter and income to live with dignity. Beyond these most basic needs, the group wished to see client aspiration and capacity included, giving consideration to social participation, such as the clients' desire to work, volunteer, or take part in education.

The group also discussed how client needs will change along the continuum from adolescence, into adulthood and into older age. As such, longitudinal needs related to maturation as well as other influencing factors including changing goals, employment and housing circumstances must be considered. Longitudinal needs, including appropriateness and acceptability (comfort), also encompass advocacy if the client is not empowered to advocate on their own behalf.

Administrative needs

Administrative needs focused on advocacy and access. For example, the need for clients to have access to navigators to ensure continuity of service as circumstances change. Additionally, the need for simplified access, including access to physicians as an entry point to the system. While the group discussed the need for client navigators, they determined that in fact clients need to have simplified access to resources and trained staff with clear (plain language) information about the program and eligibility. Participants expressed a desire for strength-based access to the program, along with culturally competent, respectful and sensitive support from staff.

The system

In the context of this discussion the system focuses on government ministries. It is recognized that all invested stakeholders, including clients, client advocacy groups, NGOs and crown corporations, comprise and influence the complex system in which the PWD program exists.

The discussion focused on clients' needs being directly linked to the system with respect to connectivity and transitions between ministries. Consideration is to be given to service integration including allied health benefits such as dental and prescriptions. As client needs are closely linked to understanding of and trust toward the system, there is a desire to reduce client cynicism and fear toward the system reflecting a desire to simplify the system.

In examining client needs from differing perspectives the following matrix illustrates the importance of providing appropriate, accessible, acceptable and equitable services. This matrix has been adapted from the BC Patient Safety and Quality Council's Health Quality Matrix.

Matrix of client needs

	Areas of Need	Acceptability — Services are respectful to client preferences, needs and values	Appropriateness — Services provided are evidence-based and specific to individual client needs	Accessibility — Ease with which services are reached
		<----------------------------------Dimensions of Quality---------------------------------->		
Quality of Life	Individual basic needs			
	Administrative needs			
	System level needs			
	<------------------------------ Equity ------------------------------> Fair distribution of services according to population need			

Discussion #2: evaluation design

The purpose of this discussion was to generate conversation around what evaluation design may best suit the PWD program, considering the client, the Ministry and the system. Contextualized from the perspective of what is important to the Ministry, the facilitators provided criteria to use for selecting the most appropriate evaluation approach(es).
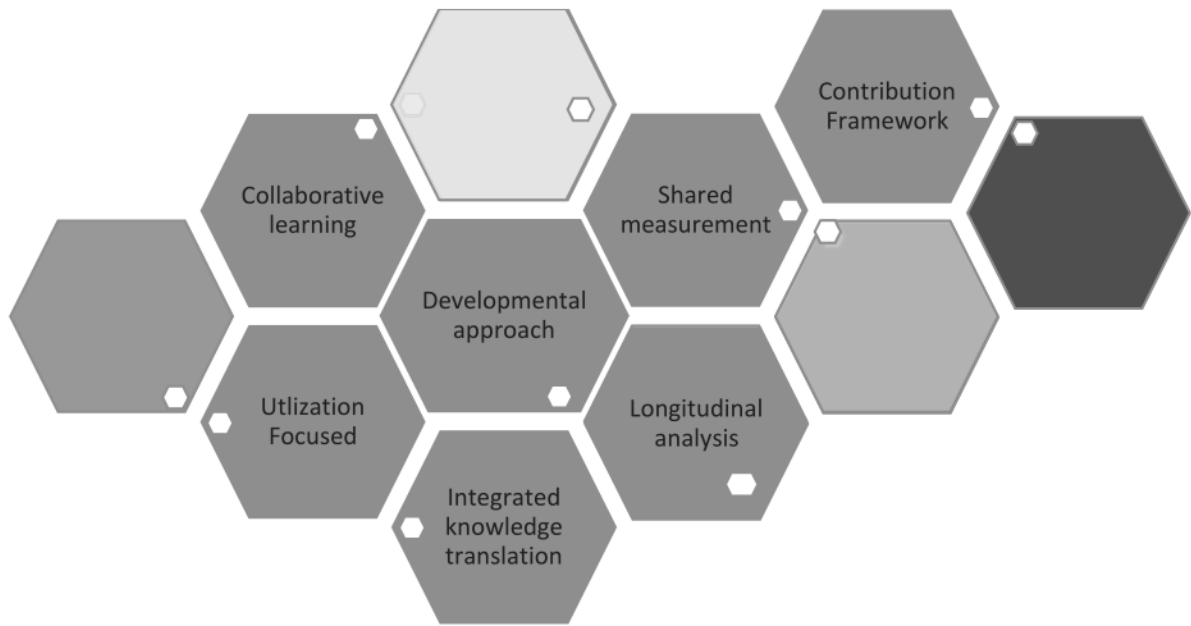
Purpose of the evaluation

Participants shared ideas around the purpose of the evaluation. There was agreement that the overall intention of the evaluation is to:

- Determine to what extent the program is meeting basic needs (safety, food, shelter, and clothing)
- Improve the acceptability, appropriateness and accessibility of supports (delivered across government) and consider the needs identified by clients, including aspirational goals
- Measure outcomes in each of the categories of client needs

Elements of the evaluation design

Building upon the conversations toward defining and categorizing client needs, participants took part in subsequent conversations around the best evaluation design for the PWD program. The following key themes emerged (and are depicted in the visual below):

> ✓ The best fit will not be one approach but rather a mixed design that include utilization focused evaluation (logic modelling) for program outcomes and a developmental approach that will support complex systems-level evaluation
> ✓ There is a need to take a program development approach alongside core indicators for longitudinal analysis
> ✓ There is a desire for collaborative learning and shared measurement across government, between Ministries of Health and Child and Family Development
> ✓ It will be important to develop a contribution framework, rather than an attribution framework
> ✓ There was agreement not to let the evaluation become too broad and to consider the inclusion of many small evaluation projects
> ✓ Integrated knowledge translation will be key to ensuring evaluation results are used for quality improvement

Evaluation design

Utilization focused evaluation considers the intended use of the evaluation by the intended users (including clients and families). A utilization framework will identify goals, outcomes and outputs as well as distinct measurement tools. Inclusion of a logic model means linking inputs to activities and outcomes, demonstrating Ministry inputs have value, and identifying areas for improvement. This approach includes quantitative and qualitative data. A developmental evaluation approach will also include quantitative and qualitative data for feedback and continuous improvement, and will be particularly useful in the complex system in which the PWD program exists. Both approaches will capture cross-ministry indicators, including collaboration and coordination. Integrated knowledge translation will be key to ensuring evaluation results are used for quality improvement.

Idea! Create a utilization framework to create a knowledge platform (where the platform includes goals, measurements and shared data) with care that this platform is a benefit-add to the individual client.

Collaborative learning and shared measurement

The conversations unfolded with a desire to start the evaluation framework with an in-depth needs assessment of the client, program and system. The assessment will determine to what extent the system is currently providing basic needs and determine the extent to which services are acceptable, appropriate and accessible. This will provide a baseline for a contribution analysis framework.

Idea! The evaluation design should function on two axis, horizontal and vertical. The horizontal axis explores the ministry's own goals and the vertical axis, explores alignment with other ministries. For consideration is the impact of other ministries, both from the organizational and client perspectives.

As well, any evaluation approach must be done in the spirit of humility, acknowledging what is not known and being prepared for possible failures.

Discussion #3: Outcomes and indicators

The purpose of this portion of the session was to consider how program success could be defined and measured, from the perspective of the client, the Ministry, and the system.

Participants embarked on the third and final discussion, regarding the development of outcomes and indicators. To generate conversation participants were asked what success would look like (outcomes) and how success could be measured (indicators). The following themes emerged for consideration in the development of outcomes and indicators at the client-, Ministry- and system-level.

Outcomes

At the client level, outcomes include a decreased use of the food bank, stable housing (long-term) and longitudinal quality of life improvements. Participation includes meaningful employment (in the client's area of interest) or volunteer opportunities (learning new skills), the client moving forward in a self-determined way and having social networks measured by quality of relationships rather than numbers in a social network. As well, there is a desire to see clients having adequate information required to make informed/meaningful choice in various circumstances.

Ministry-level outcomes include appropriateness of service delivery, with clients who need service receiving the correct services (including awareness and correct knowledge of available services), demonstrating stability in meeting client needs over time and coordinating service and sharing knowledge between Ministries.

At the system level, participants identified trust between organizations as a key outcome. Other outcomes included connectivity and healthy partnerships between ministries and agencies linked to communication and understanding of the complex system within which the PWD program exists.

Indicators

Number and percentage of clients:
- With stated goals (including employment, volunteering, social participation and physical and emotional needs met)
- With a plan to achieve desired individual client outcomes
- Filing taxes (economic citizens)
- With blended system and earned income
- With a Registered Disability Savings Plan
- With sufficient income to participate and engage in community (self-defined)
- Safely housed vs those at risk of homelessness
- Reporting high levels of client satisfaction/client experience
- Reporting adequate number, depth and quality social networks
- With access to services that allow improved quality of life

Longitudinal, Ministry-level indicators
- Demographics/characteristics of individuals that go off assistance (ability to track post-enrollment in program)
- Description of individuals using the system vs those who are eligible but not currently using the system
- Appropriate service use: are the services being used appropriately and by the appropriate individuals?

- Compare distribution of severity of clients through time
- Compare client enrollment with socioeconomic data through time
- Ministry looks for stability month to month
  - More clients working
  - Short term involvement if possible
  - Culturally competent and equitable access
  - Better coordination between ministries
  - Less redundancy in requests of information for clients

Idea! Use specialized sampling techniques to examine the sub-populations that are generally less likely to engage with the system. Use a specialized method for specific vulnerable groups.

System-level Indicators
Trust
- Trust between organizations that are part of system

Connectivity
- Connectivity, intersectoral between parts of the system
- Clients have information to make good choices

Cross-sectoral partnerships
- Greater collaboration between different Ministries / partners
  - 'easier' system navigation for clients
- Indicators for collaborations working across ministries / partners (NGO, private sector)
- System-level improvements in transitions within and across ministries

Communication / understanding
- Progressive understanding of disability, examining disability from a demand side rather than a charity model
- At the system level, also in different regions (urban / rural / suburban)
- Factors / variations in assistance / service provided in different regions / settings
- Wider public understanding of who is disabled accomplished through social marketing
- Less redundancy in what is being asked of clients

Operationalizing the indicators
- Based on quality of life indicators, what assumptions / cross- referencing may be made
- Not necessarily looking for quality of life to *improve*, but that clients have an acceptable quality of life / well being
- Look out for longer term outcomes in addition to changes that are immediately visible
- Let the target / goal be the driver of the discussions around budget / logistics and specific indicators

Idea! Consider what the story is that the Ministry wants to tell (i.e. this is the average of X indicator from Year X to Year Y), are these representative of the system?

Advice and encouragement from participants

At the end of the session participants were asked to share their advice and encouragement to the Ministry as they embark on developing an evaluation framework. First and foremost, participants expressed they were encouraged by the respectful conversations that centred on client needs and they were pleased with the interest to enhance collaboration and integration between partner ministries and organizations. Participants were pleased with the diversity of ideas put forward, and all participants expressed their desire to continue working together to support the development of an evaluation framework.

Key take away messages include:

- There is an opportunity to do something innovative by bringing such a diverse group together and thinking about culture, the system and measurement
- Embrace failure and learn from it
- Do not homogenize the population
- Strive for continuous improvement
- Conduct the evaluation with a series of smaller evaluations to ensure "we don't get lost in the complexity"
- There is a true need for collaboration between ministries to develop a meaningful evaluation framework
- A combination evaluation approach/design is needed

I am hopeful to see the number of different groups at table. These are the people who need to be at this table to consider who is impacted and how their voices are being represented.

This is an exciting opportunity to not just look at processes and data, but people and dialogue and to take a trust-building and developmental approach. The PWD program is the largest individualized funding program in province. Let's look at this in a more social, contextual way; not just as cheques issued, but as an individualized funding program.

There was a great respect for the clients during this session and a recognition of the large number of organizations that make their lives work. Relations, understanding and trust are all important. We need to foster a culture of learning/reflection.

With 95,000 client being served we have a gold mine for looking at how the system is (or is not) working. There is an opportunity to leverage these partnerships and to ensure outcomes are community-based. The Ministry can zoom in on a couple of manageable indicators and demonstrate where the highest potential is to make impact, to the client and to the system.

I would like to challenge the Ministry to take progressive look at what disability and the PWD program are, not as welfare, but rather through a citizenship and human rights lens.

- Session participants

Conclusion

MSFHR partnered with the Ministry of Social Development and Social Innovation to facilitate a dialogue to inform the development of an evaluation framework for the Ministry's Disability Assistance Program. This discourse between government leaders, research experts and non-profit stakeholders, resulted in options for the Ministry to consider in developing an evaluation framework for BC's Disability Assistance Program.

The objectives for the session were achieved. Throughout the session the Ministry:
- ✓ **Gained advice on options for an effective evaluation framework in the form of a dialogue and a written report**

    With respect to identifying and classifying client needs:
    - To create a client-centred culture, autonomy of the client is paramount
    - General categories of client needs arose: basic needs, administrative needs and system-level needs
    - Quality of life, as defined by individual clients, was identified as a fourth category to underpin all client needs

    With respect to the purpose of the evaluation:
    - To determine to what extent the program is meeting basic needs (safety, food, shelter, and clothing)
    - To improve the acceptability, appropriateness and accessibility of supports (delivered across government) and consider the needs identified by clients, including aspirational goals
    - To measure outcomes in each of the categories of client needs

    With respect to the evaluation design:
    - The best fit will not be one approach but rather a mixed design that include utilization focused evaluation (logic modelling) for program outcomes and a developmental approach that will support complex systems-level evaluation
    - There is a need to take a program development approach alongside core indicators for longitudinal analysis
    - There is a desire for collaborative learning and shared measurement across government, between Ministries of Health and Child and Family Development
    - It will be important to develop a contribution framework, rather than an attribution framework
    - There was agreement not to let the evaluation become too broad and to consider the inclusion of many small evaluation projects
    - Integrated knowledge translation will be key to ensuring evaluation results are used for quality improvement

With respect to outcomes and indicators:
- Specific client outcomes, longitudinal, Ministry-level indicators and system level indicators, such as trust, connectivity, cross-sectoral partnerships and communication/understanding were identified.

✓ **Interfaced with experts that may be able to assist with the development of the evaluation framework**

At the end of the session participants were asked to share their advice and encouragement to the Ministry as they embark on developing an evaluation framework. First and foremost, participants expressed they were encouraged by the respectful conversations that centred on client needs and they were pleased with the interest to enhance collaboration and integration between partner ministries and organizations. Participants were pleased with the diversity of ideas put forward, and all participants expressed their desire to continue working together to support the development of an evaluation framework.

Key take away messages include:
- There is an opportunity to do something innovative by bringing such a diverse group together and thinking about culture, the system and measurement
- Embrace failure and learn from it
- Recognize the heterogeneity of the target population
- Strive for continuous improvement
- Conduct the evaluation with a series of smaller evaluations to ensure "we don't get lost in the complexity"
- There is a true need for collaboration between ministries to develop a meaningful evaluation framework
- A combination evaluation approach/design is needed

With respect to next steps, after the Ministry reviews this document and reflects upon the dialogue the Ministry may:
- Seek additional input from specific content experts, including collaborating with other ministries, for resources that will support the development of an evaluation framework. Working groups may be an appropriate avenue to consider to streamline discussions.
- Select the evaluation platform/approach
- Engage persons with disabilities and their networks to hear what client needs are so they may be reflected in the evaluation framework
- Consider conducting an in-depth needs assessment to provide input into baseline data to inform the evaluation framework

Client-centred | Strength based | Mixed design | Knowledge translation