SA Recovery and Renewal: Co-Designing Transformation

OMSSA Conference

Dec 2 & 3

Ministry of Children, Community and Social Services

Ontario

A long-term vision, starting with recovery:
People on social assistance achieve independence and financial resilience through an ecosystem of connected and personalized supports, supported by a streamlined and responsive system

Where we've been…

- Growing caseload and costs (5%/year)
- Focus on administration and processes, not support
- Broader system is siloed, hard to navigate, leading to poor life and employment outcomes

Where we're headed…

- When federal benefits end, Ontarians who remain out of work are likely to turn to Ontario Works – the scale and timing of the impact to social assistance depends on the speed and nature of economic recovery, and public health factors

What we'll do now: focused action in four key areas to get ahead of a surge in social assistance cases

Accelerated digital delivery solutions

To improve access and service delivery during the pandemic

- new, easy online application
- digital disability forms
- MyBenefits expansion
- 2 way messaging
- video chat
- e-document management

Centralized and automated delivery

Reduce red tape and let caseworkers focus on working with clients

- centralized intake
- digital identity verification
- centralized key ODSP health benefits
- e-signatures

Risk-based eligibility review

To automate eligibility assessments, reduce time spent on administration

- real-time digital verification to confirm key eligibility information
- automatic verification and validation of financial information to confirm eligibility

Access to employment and training

Working with MLTSD, will improve access to employment and training services for clients

- enhance access to employment and training supports to help clients get back to work as jobs are available

Where we'll go:

Working across branches, co-design a new provincial-municipal transformation vision with municipal Ontario Works delivery partners and set the stage for longer term system transformation that drives outcomes, accountability and system performance

- **Engagement, co-design, and testing with staff and partners**: Developing a future state together
- **SA One:** Healthy, energizing workplaces; open communication that supports change; resilient organization; improved client relationships
- **Service continuity**: Continuing to deliver service excellence and accountability through change

Social Assistance: Where We're Headed

... in the long term

Supporting Economic Recovery → Social Assistance Renewal and Transformation → Integrated Human Services
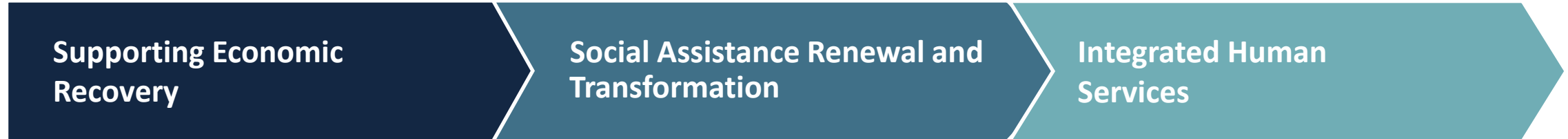
... in the short term

New **SA digital application in** prototype sites prior to provincial rollout + centralized and automated **intake and risk-based eligibility prototype**

New digital tools e.g. 2-way messaging, e-signature, digital disability determination package

ODSP contact centre expansion begins in EST prototype sites
First wave of benefits centralized in ODSP EST sites

Centralization of key ODSP health benefits administration
Expand intake prototype to 9 EST OW sites
EST prototypes go live

Expand intake prototype to additional ~15 municipalities

Iteratively **introduce central intake + risk-based eligibility to ODSP offices**
Further expand **centralized Ontario Works intake** to additional municipal partners

New provincial-municipal transformation vision defined

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October - December

January - April

Social Assistance: Where We're Headed

	Where We've Been	**The Current Focus** The Recovery Period (Sep 2020 – April 2021)	**What's Next?** The Renewal Period (Spring 2021 – 2024)
Supporting clients toward success	**Caseworkers manage all aspects of each case** • Financial eligibility • Participation agreements • Benefits administration • Employment services • Referrals and system navigation	**Prototyping new case management approaches** • Common assessment | New action plans • Shared case management with Employment Ontario • Increased access to employment supports • Piloting new service delivery approaches	**A person-centered, supportive client approach across the life course** • Overall shift to life stabilization, individualized support and system navigation • Case segmentation – high and low touch approaches based on client needs • Better connections with Employment Ontario
Making systems faster, fairer, more accountable, and creating time for case management	**Modernization to speed current processes** • EDM • MyBenefits • RPC • Contact Centre Pilots	**Creating centralized functions** • Centralized intake process that reduces paperwork, giving caseworkers more time to support clients through crisis and help them get back to work • Automated, risk-based eligibility verification **With enabling technology and policy** • New digital tools and service modernization (easy-to-use online application, expansion of MyBenefits digital platform, 2-way digital messaging between clients and caseworkers)	**Centralizing financial assistance*** • Central teams and systems administer intake, ongoing eligibility, mandatory benefits, financial disbursement • Expanding risk-based approaches **Benefits and incentives to support clients achieve life stabilization goals will remain at the local level*
Working with partners	**Working with partners to address challenges of the pandemic** • Co-design and deliver emergency response initiatives • Leverage learning to inform opportunities for the future	**Planning for renewed provincial-municipal and First Nations service delivery approaches** • Renewed provincial-municipal operating, funding and accountability models • Plan with First Nations partners a unique approach to SA Recovery and Renewal	**Implementing a renewed service delivery vision** • Co-designing, enabling and implementing new approaches that bring us closer to Human Services Integration

• Engagement, co-design, and testing with staff and partners, including the bargaining agent: Developing a future state together
• SA One: Healthy, energizing workplaces; open communication that supports change; resilient organization; improved client relationships
• Service continuity: Continuing to deliver service excellence and accountability through change

Components of Centralized Intake

Social Assistance Digital Application (SADA)

- Ontarians will be able to apply online for Ontario Works through the new, user-friendly Social Assistance Digital Application (SADA)
- Applications received through SADA in the prototype municipalities will be redirected to the central intake unit
- SADA will enable online identity verification (eID) and consent
- SADA is currently available for applicants from prototype sites at Ontario.ca/SocialAssistance

Risk-Based Eligibility Determination (RBED)

- Applications received through SADA will go through a risk-based eligibility determination (RBED) framework
- RBED will automatically corroborate information provided by applicants against third party data sources at intake to provide the following verification intelligence:
  - Immediate verification required
  - Granted with verification required in 30 or 90 days
- RBED will be released iteratively. Some complex cases (e.g. trustees, applicants under 18) will not go through RBED for launch

Provincial Intake and Benefits Administration Unit (IBAU)

- A Provincial central unit will manage applications for prototype municipalities that come through SADA and RBED
- The Province will:
  - Review applications, resolve duplicates and merge applications in SAMS
  - Fill missing data fields for in-scope applications if required
  - Assess and grant new applications, reinstatements and reapplications
  - Provide phone support for SADA
  - Complete telephone SADA applications
  - Redirect cases that are high risk or exceptions (e.g. applicants who are under 18) to municipalities for a decision

Clients will find it **easier** to apply for and receive social assistance

Case managers will have **more time** to dedicate towards life stabilization activities

What We've Learned

1 That prototyping significant changes is a solid approach to allowing space for learning, sharing ownership, developing and progressing towards a shared vision, together.

- One of the prototype sites is acting as lead "point of contact" for knowledge transfer with the IBAU

2 That focus must remain on the client journey during the intake process. Measures ensuring that clients tell their story only once and experience minimal handoffs between the IBAU and local offices are critical.

- A warm transfer process was implemented between the IBAU and Local Offices, for those in urgent need

3 That flexibility is required to address the needs of our most vulnerable clients and we need to consider alternate pathways to work with clients experiencing an emergency or dealing with urgent needs.

- Emergency Situations Job Aids from prototype sites were shared and adapted for the IBAU

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What We've Learned

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That we will reach higher levels of success when local offices have enough time to prepare staff and clients for changes, recognizing that effective change management and communication are essential to the success of the new processes.

- Feedback provided by the prototype sites will be instrumental in planning for the next roll-out

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That working with local offices to leverage best practices and tools already in place (for virtual service delivery and issues management) and co-design on new approaches are significant success factors.

- Verification/Evidence Job Aids shared by the prototype locations will help the IBAU refine processes

- A joint issues management approach was established to reach quick resolution of identified issues

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That iterating on our technology and business processes, with the view of reducing work at local offices, is an ongoing and fluid process that allows the opportunity to find efficiencies.

- Sample SAMS notes shared by prototype sites to assist the IBAU in capturing relevant details

- Jointly exploring technology & process change opportunities to reduce referrals to the local offices

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