Designing Impactful financial empowerment programs

DISABILITY BENEFITS COMPASS

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After this session, you will be able to

- Understand how service design can be adapted to include disability accessibility to improve service outcomes

- Identify the four steps of service design with accessible adaptations

- Recognize the significant impacts of service design for your organization

- Five tips to integrate service design in your organization

- Engage participants in specific ways in an accessible manner

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Presentation outline

About Prosper Canada

- Service design as an approach

People with Disabilities project

- Our approach & why it was important

- What it looked like at each phase

Tips for integrating service design in your work

Questions

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About Prosper Canada

As **Canada's leading national champion of financial empowerment**, we work with government, business and community partners to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

We have been building our skills and capacity for service design since 2016. Since building service design methodology into our project work, our staff and program delivery partners are able to learn more about the experiences of people living on low incomes, pinpoint organizational needs, and ensure programs and resources are designed with these learnings in mind.
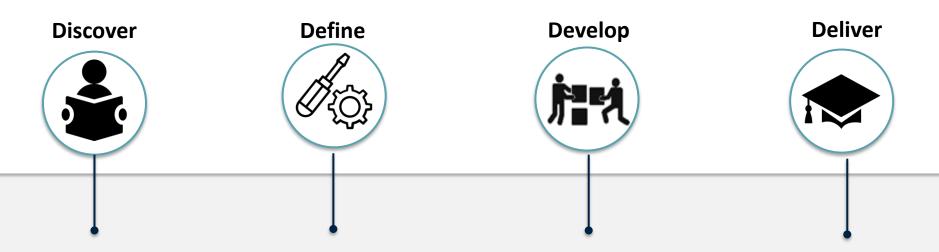
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What is service design?

A human-centred design method with a focus on:

- Building an in-depth understanding of the experiences and needs of clients and staff

- Designing with, not for, people who use the service

- Testing and piloting new ideas early and often

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Phases of Service Design

Discover

Learning about the ins-and-outs of a service to understand through:
- Interviews
- Surveys
- Journey maps

Define

Distilling everything we've learned to define :
- Key needs
- Opportunities
- The challenge we'll design for

Develop

Brainstorming and developing new ideas and possibilities through:
- Co-design workshops
- Prototyping and testing

Deliver

Piloting ideas to see what works in the real world

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Project overview

The Increasing access to benefits for people with disabilities

project is a three-year pilot project funded by the Government of Canada's

Social Development Partnerships Program – Disability.

The ultimate objective for this project is to develop an effective service, with the potential for sustainable scaling, that can support people with disabilities – at no or low cost to them – to access government benefits they are eligible for, but not receiving.
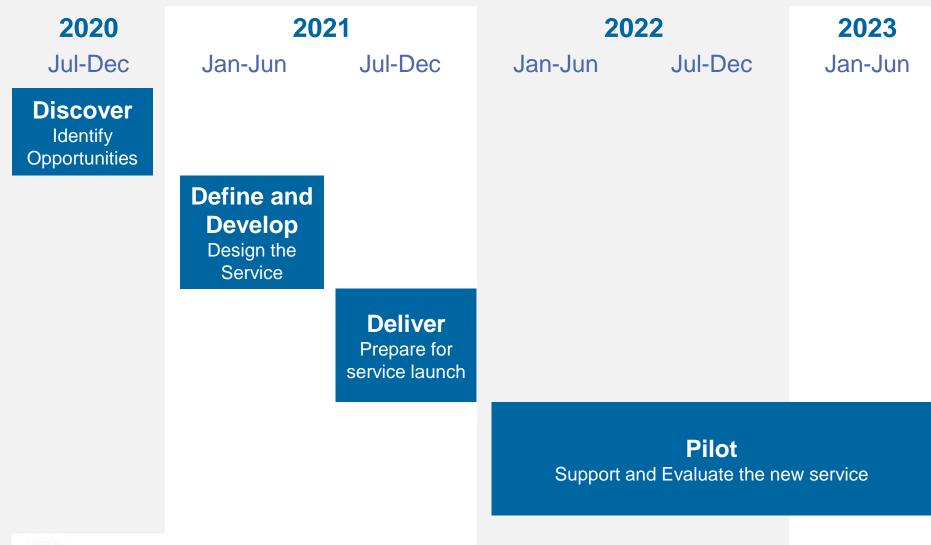
Why service design?

- To identify the best unmet opportunities for supporting people with disabilities to get access to benefits

- Take into account the experiences and perspectives of people with disabilities, system experts, and service providers

- Develop a service and tool:
  - where people feel themselves reflected in the service, one that comes from them instead of one that was created by someone else
  - can be used by people with disabilities themselves, as well as supports they access, and provide an ongoing set of supports as their lives change
  - can be used by more agencies to be able to provide an access to benefits service to support and help remove barriers to benefits access for people with disabilities

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Overall timeline

2020	**2021**		**2022**		**2023**
Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun

Discover
Identify Opportunities

Define and Develop
Design the Service

Deliver
Prepare for service launch

Pilot
Support and Evaluate the new service

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Discover phase

GOAL:

To identify the best unmet opportunities for supporting people with disabilities to get access to benefits, taking into account the experiences and perspectives of people with disabilities, system experts, and service providers.

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What we did

Discover
Identify Opportunities

Jul-Dec **2020**

- **Literature review**

- **Staff and champion interviews**

- **People with disabilities:** 4 ways to participate

- **Evaluation approach**

- **Insights report**

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Discover phase

How we made it accessible

- Understand the lived experience and needs at every stage

- Four ways to participate and provide feedback:
    - 1:1 interview
        - phone (live or recorded message)
        - Email
        - online meeting
    - Weekly reflections
    - Artwork activity
    - Photo collage

What we learned

- People want to share their stories and help improve the process for others

- Service design facilitates designing a tool and service informed by those who use it

- Be flexible to shift with a changing environment – multiple methods of engagement

Define and develop phase

GOAL:

Both people with disabilities and staff agree that more support is needed to help people with disabilities access benefits. A tool will help solve the key problems of lack of awareness and understanding of the benefits available for people with disabilities, high demand exceeding available 1:1 support to help navigate access to benefits, and the need for support in remote areas.

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What we did

Define and develop
Design the service

Jan-Jun 2021

- **Journey maps**

- **Tool mock-ups**

- **Draft service model**

- **Staff interviews**

- **People with disabilities:** 4 ways to participate

- **Evaluation approach** – part 2

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Define and develop phase

How we made it accessible

- Include feedback from all who may use the tool and service

- Four ways to participate and provide feedback:
    - Mockup tool – benefits website review
    - Voice interview
    - Video workshops
        - captioning
        - sign language interpreters
        - advance materials
    - Take home activity

What we learned

- Ask first – know your audience and how they like to participate

- Provide multiple ways to engage

- Modify methods for individual needs to ensure inclusion

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Deliver phase

GOAL:
Deliver an accessible tool and revised access to benefits service to incorporate the input and learnings from the previous phases. The tool will be accessible for all people, regardless of their disability, and promoted for all to use.

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What we did

Deliver
Prepare for service launch

Jul-Dec **2021**

- **Define pilot service**

- **Create content and tool structure**

- **People with disabilities:** 2 ways to participate

- **Evaluation metrics**

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Deliver phase

How we made it accessible

- Tool user testing – 4 ways to participate and provide feedback:
  - Online survey
  - Email
  - Phone call – dedicated phone line
  - Teams/zoom meeting

- Accessibility testing – conducted by Context Creative

What we learned

- Participants' experience drives design of the tool

- Methods ensured privacy and comfort of sharing personal experiences

- Technology made collecting feedback easier in a remote environment – SharePoint and OneDrive

- Building trust through engagements led to willing participants for future opportunities

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Pilot phase

GOAL:
Pilot to assess the success of the online tool and 1:1 support service model in helping people with disabilities access benefits.

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What we did

Pilot
Support and Evaluate the new service

Jan **2022** – Jun **2023**

- **Pilot kickoff & training session**

- **Evaluation throughout pilot**

- **People with disabilities:** feedback on tool

- **Insights and recommendations**

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Pilot phase

How we will make it accessible

- Feedback from those using the service and tool

- Use engagement methods to ensure inclusion for feedback

What we hope to learn

- Assess the success of the tool and service in helping people with disabilities access benefits

- Modify the tool and service incorporating learnings

- Share final insights and recommendations to broader community

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Tips for integrating service design

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Tips for integrating service design

Start and end with people

- Design your service around the needs of the people who impact and are impacted by the service

Build it together

- Involve stakeholders at every part of the process

Draw it out and make it real

- Show things visually instead of just talking about it. Seeing pictures, images, and icons can help make it easier to understand complex systems

See the big picture

- Consider all the different people, processes, and systems that have an impact on the experience

Stay open to learning

- Test ideas often. It's better to know if something isn't going to work before you implement!

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Learn more about Prosper Canada

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Join our mailing list and learn more about Prosper Canada:
http://prospercanada.org/newsletter

Resources

Disability benefits wayfinder

Benefits wayfinder - The national Benefits wayfinder tool

Roadblocks and Resilience - Insights from the Access to Benefits for Persons with Disabilities project (prospercanada.org)

Common steps to get disability benefits (prospercanada.org)

Persons with Disabilities (PWD) Status and disability assistance (prospercanada.org)

Disability Tax Credit (DTC) Program - Application process steps, (B.C.) (prospercanada.org)

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