



*Draft – v.2*

**PUBLIC SECTOR SERVICE DELIVERY COUNCIL (PSSDC) MEETING**  
**February 23<sup>rd</sup>, 2017**  
**Ottawa, ON**

**RECORD OF DECISION**

**Attendance**

**PSSDC CO-CHAIRS**

Natasha Clarke	Nova Scotia
Jacques Paquette	ESDC/Service Canada

**PSSDC MEMBERS**

Kim Andrews	Veterans Affairs Canada
Chris Bookless	Yukon
Glenn Brunetti	MSDO Western/Northern Region
Steve Burnett	Ontario
Mark Burns	Yukon
Jennifer Dawson	Treasury Board of Canada Secretariat
Beverly Dicks	British Columbia
Guy Gordon	Manitoba
Michelle Herder	MSDO (York Region) (for Karla Hale)
Ron Hinshaw	British Columbia
Rob Horwood	New Brunswick
Stephanie Jay-Tosh	Immigration, Refugees and Citizenship Canada (for Michelle Latimore)
Christian Laverdure	Innovation, Science and Economic Development Canada (ISED)
Linda Maljan	Northwest Territories
Réa Mckay	Public Services and Procurement Canada
Jacqueline Ratté Kohut	Manitoba (for Paul Pierlot)
Jackie Stankey	Alberta
Silvano Tocchi	Canada Revenue Agency
Rhonda Tsingos	MSDO (City of Brampton)
David Ward	Ontario



## OBSERVERS / SUB-COMMITTEE CO-CHAIRS

Deb Bergey	Region of Waterloo
Corinne Charette	ISED
Patrick Charette	ESDC/Service Canada
Richard Dalpé	Treasury Board of Canada Secretariat, Research Committee Co-Chair
Bernadette De Souza	Ontario Shared Services
Anik Dupont	ESDC/Service Canada, Death Notification and Registration Co-Chair
Claudia Ferland	Indigenous and Northern Affairs Canada
Rob Frelich	ESDC/Service Canada, CDI Co-Chair
Kevin French	Ontario Shared Services
Allison Little Fortin	Immigration, Refugees and Citizenship Canada
Nancy MacLellan	Nova Scotia, ICCS Board President
Margo McCarthy	ESDC/Service Canada
Philip Pietersma	Innovation, Science and Economic Development Canada
Annette Vermaeten	ESDC/Service Canada, Service Network Collaboration Co-Chair

## INSTITUTE FOR CITIZEN-CENTRED SERVICE

Dan Batista  
Maria Luisa Willan  
Stefania Silisteanu

Item	Topic / Discussion	Decision/Action
1.	<p><b><u>ADMINISTRATIVE MATTERS:</u></b></p> <p>Jacques Paquette, PSSDC Co-Chair, welcomed members and observers to the meeting.</p> <p><b>A) <u>Approval of Record of Decision from September 15<sup>th</sup>, 2016 in-person PSSDC meeting, Victoria</u> (Refer to TAB 1A)</b></p> <p>Record of Decision of PSSDC meeting from September 15<sup>th</sup>, 2016 approved without changes.</p> <p><b>B) Acceptance of February 23<sup>rd</sup>, 2017 PSSDC Meeting Agenda (Refer to TAB 1B)</b></p>	<p><b><u>Decision # 1:</u></b></p> <p>Record of Decision of PSSDC meeting from September 15<sup>th</sup>, 2016 approved.</p>



	<p>The PSSDC Meeting Agenda of February 23<sup>rd</sup>, 2017 was approved. No comments or questions were raised.</p> <p><b>C) PSSDC Financial Status Report (Refer to TABS 1C)</b></p> <p>Linda Maljan, PSSDC Treasurer, presented an update on the PSSDC's financial status. She noted that PSSDC has a healthy budget of \$341,959.75; this total takes into account recent funding to the Death Notification Working Group, Framework Working Group and Channel Shifting Working Group. Linda noted that other projects are under way such as the recent funding approval to the Research Committee in the amount of \$70K to hire a research expert and an additional \$12.5K for media monitoring including social media as approved at the Joint Councils' meeting. This funding is split 50/50 with PSCIOC.</p> <p>Anik Dupont advised that the Death Notification Working Group will be submitting an additional funding proposal in the amount of \$75K for Phase II of project; this amount would be split 50/50 with PSCIOC. It was also noted that the PSSDC's Service Network Collaboration Working Group may be submitting a funding proposal in the near future. Natasha Clarke advised that as a result of the discussion related to the work of the Framework Working Group at the Joint Councils' meeting, the working group may need additional funding from the Councils, more details would be provided at a later date.</p> <p>Linda encouraged members and/or committee and working group co-chairs to apply for funding if needed. All members in favour of PSSDC financial statement.</p>	<p><b><u>Decision # 2:</u></b> PSSDC meeting agenda of February 23<sup>rd</sup>, 2017 approved.</p> <p><b><u>Decision # 3:</u></b> All PSSDC members approved the financial report.</p>
2.	<p><b><u>MSDO – 211 Services-Unlocking the Value of 211 (Refer to TAB 2)</u></b></p> <p>Karen Milligan, Executive Director for Ontario 211 Services, gave a presentation on the value of 211.</p> <p><b><u>Discussion:</u></b></p> <ul style="list-style-type: none"> <li>Guy Gordon inquired around how much 211 evaluates the experience and effectiveness of the agency. Karen Milligan replied that they don't evaluate the effectiveness of the agency, 211 is funded by the federal Government, the municipalities, and the United Way. There are some checks and balances and they do speak with other local agencies before they make records public, they also respond to any feedback if there are concerns for including or not including somebody into the database.</li> <li>Chris Bookless asked that in case of a disaster, instead of clogging the 911 line, how does 211 handle these</li> </ul>	



situations. Karen Milligan responded that they have protocols in place for 911 in the province around emergency situations, 211 can/does transfer to 911 in crisis situations. If it's not a crisis, the person would hang up and dial 911 themselves. 211 can't just transfer anybody for any particular situation, there are some constraints there, they do have in place training and 211 works with first responders; whether you call 911 or 311 or 211 platforms are in place.

- Linda Maljan asked how 211 deals with mental health for vulnerable populations, we do know there are challenges for those people to access the appropriate services, do you have any agreements with federal government to address the questions? How you deal with that; 40% of those people are looking for federal services in Northwest Territories. Karen Milligan answered that many of the federal services are duplicated on 211 website; there are numerous calls from people having difficulties accessing those services, either they are in Toronto or other parts of the province.
- Deb Bergey expressed that in Brampton there is an online platform but one of the challenges for 211 was pulling back search results that match the eligibility of requirements and asked if 211 had been able to resolve that? Karen Milligan replied that they haven't solved it yet, but it is on the enhancement list, the system will search for the location, the ranking system has been adjusted, and the next step is asking about the eligibility and find a better match. For example, if there are seniors or they provide a specific postal code, the search would return things that are more appropriate.
- Guy Gordon asked Karen about what she sees as the big opportunity here for this table to think about in regards to the future in advancing this platform and channel. Karen Milligan commented that the biggest opportunity for the public sector and all levels of government is to look at integrating the data set; integrating data collection process is not easy, it's work intensive, to be self-directed; we are making improvements; we do validation part; to look at leveraging a very comprehensive database.

3. **Channel Shifting Working Group (TAB 3A and 3B)**

Ron Hinshaw, Co-Chair of the Channel Shifting Working Group, gave an overview of the objective and approach in the development of the Behavioural Insights Playbook. Ron noted that he and the rest of the working group, Steve Burnett (ON), Chris Laverdure (ISED), Linda Maljan (NWT), Mark Burns (YK), and Annette Vermaeten (ESDC), had set up the working group a year ago and landed on the concept of using behavioural insights to nudge people to shift from in person or call to online services; the service is effective, but under-utilized. The objective of the playbook was to create a step-by-step approach for applying behavioural insights to channel shifting. Ron noted that in British Columbia his team has used the playbook for its hunting licenses and they have found it very beneficial. The BC behavioural team has reviewed the playbook and have found the material to be of high value.

**Decision # 4:**

The Behavioural Insights playbook has been approved by all members.



Ron introduced Janice Horne and Jane Howe from Deloitte who gave a presentation of the Behavioural Insights Playbook. Jane encouraged members to be champions of this tool.

**Discussion:**

- Natasha Clarke stated that as we work in the digital space, we are building services for human beings and it is instrumental and important to not lose sight of the humanity element.
- Glenn Brunetti inquired around the philosophy behind the user design methodology, how is the user center methodology, how does that fit into the human centre design. Jane Howe responded that they used the methodology in the user centre design; the thinking is rooted in the concept, a real understanding of the client. Putting clients in the centre of what you do, design around the clients; get to know them at an intimate level, how they feel, understand how they behave, that is a level of understanding that allows you to do this.
- Jackie Stankey thanked the working group for the development of the playbook and noted that she wished that they had this available before they developed MyAlberta pilot. She also stated that this work should take into account a political component as it can get political depending on the current political climate at any given time. Jane Howe mentioned that in regards to this work there are people who use the term manipulation but the objective is to try to help improve outcomes for citizens; being able to provide an easy and convenient way to renew your driver's license, for example. You do need some championing at the political level to support this work.
- Chris Laverdure suggested for members to use and share the playbook in their jurisdictions. It's an excellent playbook and he will take it to OECD to show what Canada has done, he encouraged each jurisdiction to try it.
- Jacques Paquette expressed his support for the behavioural insights playbook; he noted that he found the playbook extremely useful and interesting. He recommended removing the "draft" word and sharing it broadly. This is not the end of the journey, this is a new journey in a way, what we are lacking is a reference document that everyone could use. Jacques advised that the playbook will be presented to the FPT DMs' Table at their next meeting; this would show the value of the work we are doing as Councils and achieving greater visibility.
- Guy Gordon also expressed his support for this work and inquired about marketing and support for the playbook. The value of the playbook is being able to take it to any Clerk or Deputy to show the value of our work at this Table.
- Natasha Clarke asked members to approve the Behavioural Insights Playbook pending minor edits from Deloitte. All members in favour of Playbook.

**Action Item # 1A:**

Deloitte to make final edits to the Behavioural Insight playbook and send it to the Co-Chairs of the Channel Shifting Group.

**Action Item # 1B:**

ICCS Secretariat to post final version of Behavioural Insights Playbook on the ICCS website and to forward copy to all members.



	Natasha asked for final version of Playbook to be posted on the ICCS website and available to all members. Members are encouraged to share playbook in their jurisdictions.	
4.	<p><b>Service to Business Community of Practice (Refer to TAB 4)</b></p> <p>Paul Pierlot, Co-Chair of the Service to Business (S2B) Community of Practice (CoP), joined the meeting via teleconference. He advised that he would be stepping down from his role as co-chair and that Steve Burnett would be assuming the co-chair role. He stated that since November 2016 the S2B Community of Practice has been working with Mary Tate from Optimus/SBR to develop a Call to Action for a pan-Canadian EBS solution, as well as a Business Case and Ecosystem Scan to support implementation.</p> <p>Mary Tate gave a presentation on the Call to Action and stated that the objective of this work was to develop a clear and compelling Call to Action and Business Case that aligns and excites public sector partners to drive EBS improvement initiatives forward; while also building an increased understanding of the current S2B EBS ecosystem and environment to support the implementation of this strategy.</p> <p><b>Discussion:</b></p> <ul style="list-style-type: none"> <li>Jacques Paquette thanked Mary Tate and reminded members that the Call to Action has a list of barriers, as noted on slide 9, that need to be addressed. He asked members to provide feedback on the Call to Action.</li> <li>Christian Laverdure tied back to the discussion around the Logic Model (Framework Working Group); he noted that on page 8 there are already a number of initiatives taking place across government today with the potential to support achievement of the EBS vision such as the Business Number and need to focus on provincial level acceleration of the BN.</li> <li>Natasha Clarke commented that this work is something to think about: the slide showing the current eco-system (slide 14) is a very impactful picture. How do we talk to our DMs and our Clerks? There are multiple factors in decision making; people's roles and responsibilities are not clear and there are conflicts arising around that; it is important for us to be respectful of the corporate registry owners, Joint Councils have a part to play in this and we need to take all stakeholders into consideration. She thanked the subcommittee for the document, this would be instrumental if we could move forward in our jurisdiction; we need to think in terms of how we present it to the DMs and Clerks to leverage those decision makers and our colleagues in these critical areas.</li> <li>Guy Gordon noted that it's important to have conversations around what is the real intent in each jurisdiction, where</li> </ul>	<p><b>Action Item # 2:</b></p> <p>Service to Business Community of Practice to work on further refinements to Call to Action. An update to be provided at an upcoming PSSDC teleconference.</p>



they want to go with this; also worth considering the fundamental governance, purpose, structure, ownership; the diversity of this makes collaboration doable but it does require deeper conversations and big decisions.

- Natasha Clarke suggested thinking about co-creating a proposal that can be tested with stakeholders and discussed with the Deputies; how do we action this to get tangible things and not having same conversation six months from now; there are so many players. In Nova Scotia they are modernizing the corporate registry; how can we capitalize on that? Natasha offered to participate in a call to work on this if necessary.
- Linda Maljan stated that is work is very helpful. In the Northwest Territories they have Service to Business however they are not on the Business Number yet. She noted that the “Our Ask to You” on slide 10 is not deep enough for moving ahead. Need more specific steps for clearer direction. What would you like us to do in order to take this to our ministers?
- Jacques Paquette stated that the issue is that there are many players but we are in a good position as there is an FPT DMs’ Table and Clerks Table that are interested in this work. This is an important tool, if we can provide the right information and description of the challenges we are facing, we may get results to move forward; we need some message to convey around the opportunity that exists. Need to prepare a conversation (story) with sufficient and concrete elements. The discussion today can help to ensure that we are well equipped for the next stage of this discussion. At the DMs’ Table we have a champion on EBS to help us prepare the discussion with the DMs and the Clerks to move this forward. Do we have what we need here? What do you think that you will need in your own jurisdiction to move forward? As for the vision and the approach, this is good but it requires a further conversation to advance this.
- Steve Burnett noted that Deputy Minister Angela Coke is the EBS champion at the DMs’ Table. Are we able to sharpen what her championship role is? Let’s put together a system or a governance approach around this.
- Natasha Clarke responded that this is about how we can engage the DMs’ governance on this. We need them to engage, Angela Coke could play a role and leverage support with some of those FPT Tables.
- Corinne Charette expressed her agreement of this work and noted that the scan highlights the different players that are part of a broad ecosystem. We have to refine the Call to Action, need to provide the Deputy champion with a sub stream of activities; what are the provinces that have adopted, but not completed, what are the provinces that we want to adopt; a roadmap on the adoption; second roadmap on the registry or third one on the Blockchain; we want to give the Deputy measurable objectives and a roadmap that she can follow. A bit more work is required to go forward.



Natasha Clarke agreed and inquired if this work needs to be done at PSSDC or ask someone else outside of this group, is it the BN group who can do this? Corinne Charette responded that our governance is fragmented. Bringing it to the group is good to improve our services and help the provinces understand the big picture; the group has to lead the work and continue to nurture measure and strengthen.

- Linda Maljan stated that some of the provinces and territories may want to include all the right people in the conversation and this could be included in the roadmap. Need to ensure that the ecosystem is inclusive enough. Natasha Clarke commented that there are other players that could take the lead; in order to provide that one page to our champion to move this forward.
- Jacques Paquette stated that in regards to the Call to Action around engagement and support of federal, provincial and municipal governments to move forward with an integrated and connected EBS solution, the key is involvement. Slide 9 contains the Barriers and Gaps to work on; we need to champion this; to find ways of working with different committees. We try to do everything but there are likely players in our jurisdictions to make sure that we have a good understanding of what we want to achieve collectively. This continues to be the issue. He suggested for members to reach out within their organizations to engage in this conversation and for the working group to continue to work on the Call to Action and gather some more information to move this forward. To support the Pan-Canadian EBS solution, we need to unpack this. The impact is being able to highlight the challenges we are all facing in our jurisdictions and how DMs can help us.
- Christian Laverdure agreed with further work to refine the Call to Action for the Deputy Champion and to provide her with the list of contacts that we are engaging in this discussion, what we are trying to do with EBS, each Deputy could use this in their jurisdiction to try to engage others. This is about governance, who leads what?
- Natasha Clarke stated that members need to keep discussions focused on the initiative and what we want to accomplish; the message to the Clerks and DMs' Table is to demonstrate that there is complexity and depending on the initiative, there are different players.
- Silvano Tocchi commented that this work is ambitious, too broad and includes many players, which is why we are worried about the governance. That is why a table like this has to make sure that the other tables talk to each other and narrow down the scope to the higher tables; we show tactically that we make practical steps to move forward; critical map and describe it as a necessary enabler that generates momentum and it makes it easier for people to buy it and make them understand while identifying the players and working with them.



	<p>Steve Burnett advised that the working group will work on refining the Call to Action based on the discussion and an update will be provided at an upcoming PSSDC teleconference. Further refinements would help with the discussion with Deputy Angela Coke.</p>	
5.	<p><b>Sex/Gender Designations on Identity Documents (Refer to TAB 5)</b></p> <p>Anik Dupont, ESDC, gave an update related to the results of the jurisdictional scan regarding sex/gender designations on identity documents. She noted that at the Victoria in-person meeting jurisdictions provided information on this topic. The Government of Canada is taking steps to work with jurisdictions on the LGBT issues, the Prime Minister has appointed a special adviser on this matter, in order to develop and coordinate strategies and the agenda to promote equality and LGBT rights. TBS and the Department of Justice were identified to provide support to this adviser; consultations with various groups in the country are taking place; all federal departments will be developing an approach in dealing with the questions of gender. The core of this program is to review the policies and programs within the organizations to have legitimate use for or to retain the information themselves; why people collect the data, that is the Human Rights question; the work is underway and one of the streams is to work with jurisdictions to draft a primary document piece of authentication; the question is how we could help? Anik noted that PSSDC can play a role in this area.</p> <p>She stated that back in 2012 there was a Human Rights complaint from a transgender that wanted to register for SIN card and was asked for the birth certificate. The government looked into the program and did an operational review. There were questions about what is the use of the information? In the SIN register we don't use gender information; no other program with ESDC issued or used gender. We are doing country wide consultations on how we can improve the whole experience for citizens. After doing the evaluation, we were working with Service Canada colleagues setting up training around transgender/identity. In July 2016 fourteen federal departments including Human Rights participated in these discussions, we presented our case of the complainant as a typical case where there have been discriminations done by requiring this information. The landscape has changed since then and progress has been made, it was in the best interest make those changes, we had partners and negotiators. The government reached a settlement last December and made public the changes that were made. Now when you request a SIN card we don't require the document to provide gender identity. We are changing the information on the website, the request form and offering a third option for gender, but not mandatory. The technology for the SIN registry needs to be changed; is an old database and needs to be updated to be more flexible and to offer an option for gender identity.</p> <p><b><u>Discussion:</u></b></p> <ul style="list-style-type: none"> <li>Jacques Paquette stated that from a service delivery perspective, there is a series of questions for information that</li> </ul>	



needs to be collected, how do you collect that now? Do you need to collect information on gender identity for delivery of benefits? The answer is no. From a policy point of view, where we are asked to do gender based analysis, where do you find that information if you don't collect it? This creates challenges around our own expectations and this is a bigger discussion.

- Chris Bookless stated that there was a case in Yukon, which it hasn't been resolved yet; however, they made the decision to adjust the gender based on the preference of the individual. In Yukon, there is a new secure driver's license but it can't be used as identity document because it doesn't mention gender, the ramifications are far beyond. There are numerous people to get into this discussion; there are lots of programs having the same issues, for example health departments.
- Richard Dalpé commented on the need to approach this in a holistic manner; it would be security and human rights in jurisdictions; consultations and discussions in the broader community being in place to engage in those jurisdictions as a starting point.
- David Ward stated that in Ontario public consultations in the community with expert panels have been done, there is an amount of rich evidence to be used to create policy and consultations with ministers and Ontarians; there should be an alignment across the country, if anyone is interested in the evidence gathered from Ontario he encouraged his colleagues to connect with him. We have to think carefully of the implementation plan for ministers; it would cost money to change the system. Ontario created an implementation plan that allows for flexibility, a positive first step is incremental changes on driver's license and health cards.
- Anik Dupont concluded that the temporary decision of changes agreed to was based on the participation and consultations with federal government and other departments; there are other programs in other departments that depend on the information on the SIN registry; the decisions made weren't made in isolation. More discussion is to come.

6. **Jurisdictional Information Sharing**

Natasha Clarke advised that previous feedback received from members around the format of the jurisdictional information sharing at in-person meetings and the questions that are included in the template may need to be reviewed and reconfirmed. It was suggested that the current format of the roundtable discussion, where members have 5 minutes to highlight the work under way in their respective jurisdictions, may need to be changed to a focused discussion on particular topic(s) of interest identified by members. The proposed format can help to better engage members in discussions around service delivery. Natasha noted that the PSSDC agenda for this meeting includes a Canada Café

**Decision # 5:**

PSSDC members agreed to no changes to the questions on the Information Sharing Template for now and for the ICCS Secretariat



session that can replace the current information sharing roundtable. PSSDC Co-Chairs are looking for feedback around the Café concept on their evaluation forms. Natasha asked members to provide feedback on the questions of the current information sharing template and also if members are in agreement in changing the roundtable format to more focused discussions, like the Canada Café concept, for future meetings.

**Discussion:**

- Chris Bookless commented that the information sharing roundtable has been on the agenda for many years. It's important for members to learn what is going on in other jurisdictions, success/challenges in different provinces that all can be aware and/or learn from; he expressed his support in keeping the information sharing template as is and to have an opportunity for an information sharing session at the meetings.
- Linda Maljan expressed her support in keeping the information sharing as is; she finds the jurisdictional reports very helpful.
- Jacques Paquette stated that the Canada Café will be used as a platform for sharing information – if it is successful, we may want to extend it. He noted that this item was added to the agenda as a response from feedback received from members for an opportunity to try something different. Members were encouraged to provide feedback on the Canada Café on the evaluation form.

to continue collecting this information for every in person meeting.

**Action Item # 3A:**

Members to provide feedback on the Canada Café format. ICCS Secretariat to provide feedback to the Co-Chairs for review.

**Action Item # 3B:**

PSSDC Co-Chairs to determine format of jurisdictional information sharing at future PSSDC in-person meetings - roundtable vs. café format.

7. **Service Network Collaboration (Refer to TAB 7)**

Rob Horwood (NB), Steve Burnett (ON) and Annette Vermaeten (ESDC), SNC Co-Chairs, provided a working group update related to the partnership guide outline, survey and recommendations. Rob thanked to Margo McCarthy, Patrick Charette and Saief Mahmood for their contribution to the presentation. He added that the SNC subcommittee needs endorsement from the members for the next steps. At the DMs' Table last January, strong interest in the initiative was expressed by a number of jurisdictions. The working group received endorsement to pursue more co-location, strategic pilots and to further develop the service mapping tool.

Annette noted that the Service Network Collaboration Working Group is looking for feedback from PSSDC members around the partnerships guide outline (which will support turnkey solutions for future partnerships), the survey and opportunities for expanding the scope of partnerships through pilots. The partnerships guide outline and survey have been expanded to include all types of existing partnerships. Examples of innovative partnerships/pilots happening across Canada were presented. In regards to next steps, the working group (New Brunswick and Ontario in particular) will test

**Action Item # 4A:**  
Service Network Collaboration Working Group to provide an update report at an upcoming PSSDC meeting/teleconference.

**Action Item # 4B:**

Annette Vermaeten to share the one-page document on the NWT's pilot via the ICCS Secretariat.



and finalize the survey prior to release. There are a few considerations for the partnerships guide e.g. it might make sense to develop national guidelines to address some challenges, for example jurisdictional differences around occupational health and safety. Is there any guidance that members can provide? Does the approach work and how can we best engage your jurisdiction to ensure maximum participation? Are there any other provinces that would like to test the survey?

#### **Discussion:**

- Ron Hinshaw noted that he would like to get more information on the Northwest Territories pilot. Annette Vermaeten responded that this took a while to develop; there were some constraints with existing authorities; the government in NWT provided the services directly on behalf of Service Canada for certain programs; the employed agent has authority to assist clients and access Service Canada services; the employee acts on behalf of Service Canada to a certain extent. Jacques Paquette added that the issue for the NWT was that Service Canada couldn't reach the remote people in that area, so Service Canada trained people from those communities to connect with their people around the programs/issues.
- Linda Maljan advised that in the Northwest Territories Legislative Assembly members recognized the need to provide better services in remote communities, particularly to Indigenous people. There are part time employees speaking the Aboriginal language, their job is to assist and deliver the service to those that don't have the technology and means to access that specific service. This has been successful thus far. The findings are that citizens don't care what order of government is providing the service; all they care about is getting the service - 40% of inquiries were for federal programs. The pilot is developed in three communities, it is a win-win situation, and the results are to come, it will be reported further in the future.
- Annette Vermaeten stated that there is a one pager explaining the pilot in more detail that can be shared with PSSDC members.
- Ron Hinshaw noted that this is a great start, they have similar situations in northern British Columbia where we provide the services, but we cannot do too much, we try to make it convenient as a service but staff may not have the skill level to provide that kind of service; it's not great for citizens but it's better than nothing; it's not great for the employee either as they were used to being able to provide a high level of service. There is an opportunity to look into how do we share resources, how do we tackle these remote communities to provide better level of services. Service Canada does provide outreach services to communities and it would be great to tag into that.
- Linda Maljan mentioned that they developed a YouTube video about the services provided in the Northwest



Territories; they are full of great ideas on how to improve these services.

- Steve Burnett stated that various jurisdictions are in different places in their relationship with Service Canada. In terms of bureaucratic barriers, not sure where they exist exactly; there is cross delivery where Service Canada goes into communities and delivers the services but there is an institutional barrier as well in making this relationship work.
- Jacques Paquette stated that in terms of partnership guide outline, the most important thing is the value proposition for the clients, partners and employees. What value do we get? This is the question we should be looking at. The idea is to go beyond co-location. There may be other ways of delivering services to consider that would provide value to citizens, partners and employees. What would be better value for our clients? That needs to be part of this discussion.
- Chris Bookless asked Linda Maljan if there is a formal arrangement between NWT and Service Canada. Is it a formal arrangement? How is that working? Linda Maljan responded that two regional directors responsible for the Northwest Territories have been involved in the agreements and have tested how this works; if it's established we can provide further information. Jacques Paquette added that the pilot with the Northwest Territories will be assessed and if this works, it can be replicated in other jurisdictions.

Rob Horwood stated that in terms of getting endorsement from the PSSDC group, there are four steps: 1. to analyze the existing partnerships that are in place; 2. To explore how we operationalize the Pan Canadian map that the team worked on; 3. To explore further partnerships and strategic pilots; 4. to demonstrate success in implementation of integrated delivery across the country.

Jacques Paquette asked members to support the next steps, with the proviso that this work needs to go broader.

Rob Horwood noted that the Service Network Collaboration Working Group will provide an update report at an upcoming PSSDC meeting/teleconference.

8. **Canada Café (Refer to TAB 8)**

Natasha Clarke stated that the Canada Café session is an exciting opportunity to try something new and that its objective is to use it as an opportunity to have focused discussions and share information around key themes of interest to the service delivery community. She noted that each of the four discussions would be led by a facilitator who is a member of the Councils. She also noted that placemats were included in the meeting package to facilitate the



discussion. Members were provided with instructions on team assignments and schedule of sessions.

At the end of the Canada Café session, each topic lead provided a recap of the feedback received at their table from all the four teams. The following notes are the feedback provided by each lead at the plenary session. The notes from the individual discussions (four themes) are attached to this Record of Decisions as an appendix.

### A) Bundled Services for Client Segments

Guy Gordon, lead, provided an overview of the key messages received at the Bundled Services for Client Segments sessions:

- To be mindful and focus on the bundles that we have in place.
- To continue the work on the Death Notification Bundle and make this final.
- Need to remind ourselves to be client-centric and based on user experience.
- Identify what bundles are done and which ones we are working on.
- Need to think more about the user experience and taking into account best practices and lessons learned from previous bundles/work
- Taking a step back on the things that are fundamental, better client-centric design, management of information, governance of data, looking beyond the current state of bundling
- We need better capability and to simplify things.
- Challenges identified: “getting over ourselves” - how much constraints we put on ourselves, culture shift required, technology, money, human resources, focusing on the “next” thing before fixing what is already in place, leverage opportunities instead of reinventing the wheel, better understanding of citizens’ needs.
- Leadership: who is going to challenge the authority issue in Canada?
- Potential Bundles: New Grad Bundle, Retirement bundle, Moving Bundle (from one jurisdiction to another), Immigration Bundle (newcomers bundle) – pick a couple that make sense and use pilot in a box
- Government as a platform – citizens to create their own “bundles” based on what “they need” not on what government think they need – need data and processes to accomplish this as everything is rooted in data.
- In regards to bundles, citizens want a “personalized” service – government as a platform.
- Journey mapping is needed to better understand gaps and leverage opportunities
- Policy modernization, better understanding of data governance.



## B) Service Integration

Rob Horwood, lead, provided an overview of key messages received at the Service Integration session:

- Digital First (build the right tool for citizens and have employees use the same tool)
- Video/OMNI Support (provide the right tools to support our business including options for skill based routing and language preferences)
- Provide 'hosted' self-serve options for customers
  - Using our 'Digital First' tools
- Consider providing physically mobile options in some cases
  - Example: State of Virginia (college campus in Sept, assisted living centres, etc.)

## Other Messages

- Model facilities like Ottawa City Hall where municipal, provincial and federal are co-located.
- There needs to be human needs based design philosophy for digital first.
- Analytics and artificial intelligence may provide more support options in the near future
  - Example: Think of the evolution of the Amazon "Echo"
- Caution: Note the legal implications of trying to do too much with regard to offering 'everything' to 'everyone'. If we provide in-correct information, we are potentially liable. Issue for service delivery design and knowledge base design.
- OMNI will provide the option for more virtual support which may evolve into the primary support model where the customer reaches out from home versus visiting a service centre
- Mobile, mobile, mobile for digital first.

## C) Digital Integration

Glenn Brunetti, lead, provided an overview of key messages received at the Digital Integration session:

He stated that overall the main themes coming out of the discussions were about the importance of connections, connecting people at the federal, provincial, territorial and municipal level. Drivers of success identified: political will, tolerance of risk, resources, governance, and organizational policy. Citizens want mobile services; they want instantaneous delivery of services. There are different tables and different discussions on this topic. Moving from traditional way of doing things to good prototyping, Death Notification as an example; Identity Management – user cases. Need to determine the inter-jurisdictional governance around digital.



#### **D) Vulnerable Populations:**

Linda Maljan, lead, provided an overview of key messages received at the Vulnerable Populations session:

- Principal framework is client service
- We are all vulnerable at times
- Giving citizens what they need, wherever they are at any stage of life, or high risk, or in trauma situations, that affects the ability of helping;
- Need to ask citizens what they need - as an example we have services online but they may prefer to get the service via another channel - maybe they have different needs;
- Better service delivery based on citizens' needs
- Simplify things; better service design
- Challenges identified: how we share information and improve service delivery, look at innovative ways to deliver services, identify areas where we can provide multiple services, data sharing challenges, required policy changes around service delivery

#### **9. Other Business:**

##### **Next in-person meeting of the PSSDC: October 5<sup>th</sup>, Charlottetown, Prince Edward Island.**

Natasha Clarke, on behalf of the Councils, announced that Chris Bookless is retiring and expressed her thanks and appreciation to him for his contribution and support to the Councils over many years. She advised that Mark Burns will be replacing Chris Bookless on PSSDC.

Jacques noted that the Council had accomplished a great deal during the Ottawa meetings and was pleased with the outcome. He thanked members and observers for their participation.

***The meeting adjourned at 4:00 p.m. EST.***



## **APPENDIX**

**Notes from the Canada café sessions during the PSSDC Meeting  
February 23<sup>rd</sup>, 2017  
Ottawa, ON**



## Canada Café – Feedback from each session

### Bundled Services for Client Segments

#### Existing bundles:

- Birth bundle
- Job Bank pilot bundle
- Four in one bundle in ON
- Death Bundle
- Restaurant bundle in NS, BC and AB
- Transactions bundle – e-commerce transactions
- Tourism bundle – fishing, hunting, find two or three and move forward
- Bundling information
- Birth Bundle
- Life event bundle
- Employment bundle
- Expedited business bundle
- EBS bundle in MB – what you need to start a business in that province
- ISED – an intelligent algorithm – looking for financing, open data

#### Challenges:

- System barriers - Full privacy and consent, what you can share
- Jurisdictional challenges
- Too much integration – how far can you go?
- How the bundle stays updated?
- Authority at a certain level, legislation, cost, resources, technologies, etc.
- Get over of ourselves
- At the municipal level the information is not in one spot
- The culture is a barrier, Canadian culture is strong in preserving the programs in silos
- In Manitoba there is a huge struggle to share the staff training differently, different background or not qualified.
- A question was raised: who is going to challenge the authority in Canada
- Legislation interpretation
- General approach if it doesn't contravene the law, how do we shift the focus and build on success?
- What is next? Not having enough information in the bundle, don't overwhelm citizens. Birth bundle – how do we integrate it in the child system care? What is a logical extension, what is too much?
- From a marketing perspective – number of people, which are the most relevant groups, get marketing and empathy, journey



mapping.

- Doing that work outside of comfort zone in terms of jurisdictions, at WSDC – in our own program, change the perspective of client
- Citizens are task oriented, we are organization oriented, delivering a complete service across the country, not in silos
- Policy modernization, now it's fragmented, do the hard work to make it simple.
- There is resistance to transformation
- Making progress
- How do we let the customers bring the context of what they need from us as opposed to think that we know what they want? Allow people to lead their context
- Bundling services at ESDC, personalized service, structure in grouping, data, profile, someone asking for information on the website and you can start popping questions, you offer a bundle of services, but in fact they ask for one single service.
- Death Bundle piece is a challenge, get over, focus on yes, it can happen, understand the system, and the work we can do. The process in BC is complicated, make it simple
- Applying design services, bureaucratic barriers
- An example with changing the passport – the passport was issued, you bring the old passport and that is done, no need for the birth certificate
- There is a lot research, with a challenge to aggregate the data
- Starting business online in the life cycle
- Accessing the bundle together, calculate the eligibility, payment – it was never applied
- Collect your information
- Missed opportunities in terms of clients, we could do proactive work helping the citizens, providing literacy services, so that in the future there are more employable policy objectives
- At the municipal level, for example in Ontario the child care, there is a tendency to silos them

#### **Opportunities:**

- New grads bundle – a job bank connecting new graduates with the potential employers
- Immigration bundling digitally
- Death Notification bundle on the reserves
- On the existing bundle: Employment bundle – we have to build successes
- New Comer bundle
- Moving bundle
- Internal mobility bundle, when you move across jurisdictions
- A suggestion was made do not think too hard, pick a couple that resonate with people and use it, try it.
- Life event bundle
- Keep focusing on sharing data, birth bundle – simplify it, guiding principles to share with people consent



- BizPal partnership – what innovation is to make things simple
- A question was raised: is bundling the right way to go?
- Build the methodologies for scaling the capability and go ahead
- Notion of social service transformation into digital age, using Service ON, know the customers, they are unique, vulnerable people. Doing a market research to understand the client mobility, understanding the client experience, then you start identifying what you need to bundle. Identify the Death bundle, the client experience, do an effective design of bundle.
- Are there research showing what the customers are saying in terms of bundling? There is a cultural thinking treating citizens as business
- New mom bundle
- An eligibility bundle – a unique bundle that I may be eligible for
- Be dynamic, change, re-think, identify new opportunities for bundle
- Within the same level of Government, start small
- Focus on User centric, ask your clientele, who is the end user?
- The terminology, start, grow, action terms – what kind of information I can get?
- We cannot track the information, the more we talk, the more we learn
- Continuous improvements
- Focus on the ones that we have and improve them

**What we learned:**

- in Nova Scotia with the restaurant bundle design, worked on the approach, asking a series of questions
- BizPal is not sustainable
- People expect personalized services with different nuances and needs
- Customize the experience
- Set up a platform , a legal support
- Let's find out first what citizens want? Understanding the clients' needs. For that, we need to be informed better, we need to understand the Information Management, government data
- We are too complicated, simplify, quick and rapid interactions, tackle proof of concept, etc.
- Be digital, but Human centric
- Look at the success, think at the customer segment based on good research and evidence, everyone has ideas, understand the clients' needs

## Service Integration

**Key Messages:**

- Digital First (build the right tool for citizens and have employees use the same tool)
- Video/OMNI Support (provide the right tools to support our business including options for skill based routing and language preferences)
- Provide 'hosted' self-serve options for customers



- Using our 'Digital First' tools
- Consider providing physically mobile options in some cases
  - Example: State of Virginia (college campus in Sept, assisted living ctrs, etc)
- Other Messages**
  - Model facilities like Ottawa City Hall where municipal, provincial and federal are co-located.
  - There needs to be a human needs based design philosophy for digital first.
  - Analytics and artificial intelligence may provide more support options in the near future
    - Example: Think of the evolution of the Amazon "Echo"
  - Caution: Note the legal implications of trying to do too much with regard to offering 'everything' to 'everyone'. If we provide in-correct information, we are potentially liable. Issue for service delivery design and knowledge base design.
  - OMNI will provide the option for more virtual support which may evolve into the primary support model where the customer reaches out from home versus visiting a service centre
  - Mobile, mobile, mobile for digital first.

## Digital Integration

- ON**
- Health Card does not exist – nor have online driver license, trying to get Health Card renewed, available online, try to break down the policy barriers at Health agencies
  - Align policies from Health Ontario with the ON Ministry of Transportation
  - Authentication
  - CSF already had MTO on board, there is a government commitment,
  - Political will, bring parties together and the solutions
  - Difference in risk tolerance, leverage others (e.g – Canada Post)
- BC:**
- BC Services Card – Combined Health and Driving licenses
  - New card that cannot be obtained online
  - "Top" service like your phone
  - "My Gov"
  - What programs will be conducive to online service: student loans
  - Corporate enabler
  - Citizen satisfaction
- ESDC:**
- Develop service strategy
  - Look at common functions



- Program agnostic
- OAS, CPP, EI
- OAS – is paper based, EI is more than 90% online
- Align process and make a national workload balance
- Notice call centres and processing staff have similar knowledge
- Digital integration would allow for a portfolio wide approach
- Telephony integration
- Silos approach because each system is built specifically for the program
- CDO? Processes are restrictive- data access is stifled, ensure the data is integrated to better serve clients and share internally / inter-jurisdictionally
- Business Number: drive across to improve integration
- Integration Call Centre: allows to adjust to solutions based on a shared approach
- Interoperability: if we were looking into individual standards – inter-jurisdictional approach
- INAC – CRA, RCMP and few others
- ISED – Canada business network ---links on starting a business – FPTM
- Provide list of programs and what you need as a business, uses an API, maintained and updated by ----
- BizPal – cover 77% of-----
- Single window and no wrong door e.g. open a restaurant in Vancouver, and over 50 programs are available
- CSF – started with federal, its traffic grew, program offices saw the small changes
- We don't need to know the end game, don't recreate something new for everyone
- Investments made internally: Federal Corporations register – interoperability is not that important, the web is your interoperability
- CRA – Income verification – being
- Integration principle – open interface – API, using open protocols
- Prototype to demonstrate how it could work
- IIRC – grants program
- In QC – back end integration
- MSDO – little integration within the local municipality versus regional
- Challenge in the different CRM system
- IIRC – interoperable system at border
- Yukon – 2 tier environment, it's a small territory and it's easier to help, someone navigates then changes the system
- Manitoba – challenges: technology is expensive, Portal – citizens and business could submit request, there is failure due to design, built to meet internal needs; from the client perspective, it wasn't taken into account
- Yukon – convert forms into PDF on Web, 2<sup>nd</sup> phone – xml form; 3<sup>rd</sup> – proper digital system with the data collection; learn from mistakes in first or second phase.



	<ul style="list-style-type: none"> <li>- CRA – Direct deposit info; link between CRA and CPP; extend capability; link between MSCA and My CRA, bundle their internal household</li> <li>- Nova Scotia – Service design – human element/interaction, how do we expose services, API, standard way to open up the information to trusted partners;</li> <li>- How do we govern in the digital age? Citizenship and Passport – Instantaneous; Where can clients go for help? Validate hypothesis and design based on...</li> <li>- Service Integration – digital first, build the right tool; video/Omni support; skills based, language; self-serve option – digital first</li> <li>- Ottawa City Hall – needs based process design</li> <li>- Caution – legal implications if we provide incorrect information</li> <li>- Virtual agent (Omni) available to customer at HOME, Death Notification example; Identity service, use cases</li> </ul>
<b>Vulnerable Populations</b>	<ul style="list-style-type: none"> <li>- Access to all services</li> <li>- Hard to look at in silos</li> <li>- Remote – access different versus complex – barrier for vulnerable group</li> <li>- Yukon – Social assistance to child protection can't provide spread service- alternate service, use third parties and different service partners</li> <li>- Most challenges: mental health, domestic challenge, cultural, these are hard to separate</li> <li>- Seniors, homecare – hearing/site, afraid</li> <li>- Physical interactions</li> <li>- BC: kids with anxiety, no school bus system; transit coaches, hard with team</li> <li>- Newly arrived immigrants – challenge – professionalism in service delivery</li> <li>- Pariah – don't make assumptions</li> <li>- Economic – homeless, low income, targeted outreach</li> <li>- Digital world can help – take own passport picture</li> <li>- Newcomers – degrees of human capital, cycle of vulnerability as go through transition</li> <li>- Digital - over the phone, can be more anonymous, judged being treated differently; role go government e.g. seniors</li> <li>- Technology can be a barrier or helpful</li> <li>- Investments long term care – continue case standards</li> <li>- Safety</li> <li>- INAC - Indigenous people: literacy, choosing, food on table, do not trust government, not one solution fits all, need to consult with all Indigenous groups</li> <li>- INAC are part of ... - elders versus young</li> <li>- Cultural vulnerability – affect Indigenous people, avoid labelling- stereotypes</li> <li>- ESDC works with partners and service providers</li> </ul>



- Seniors – Innovation lab, make CPP online – going to apply online – senior very persistent and wanted to do it;
- Ecosystem –still miss
- Outreach team – don't exist in system, remote areas – people off of the system
- New Canada Child Benefit
- Need to connect at human level
- Trauma – face to face key dominant
- BC – income assistance, staff not ready – make assumptions; northern – remote; water in schools – not having a driving license – not a barrier to driving
- Cautions: channel shifting, need to understand context, hearing assistance rebate – put online;
- Community service, design service that can be used, data sharing – can share inter-departmentally, policy/legislation need to , basic human centre design, reformed seriously around service