Client Centric Policy Playbook 1.0

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Employment and Social Development Canada
Emploi et Développement social Canada

Service Canada

TABLE OF CONTENTS

1.0 Introduction

1.1 Introduction

Clients are at the centre of the ESDC Service Transformation Plan (STP) and everything we do. They expect their government to be open, transparent and accountable. They also expect their government to deliver real and meaningful results fairly, efficiently and responsibly. Clients want and deserve programs and services that provide the best experience for them, when and where they need it, and in a client-centric manner.

To meet these expectations, the **Client Centric Policy** solution was developed as part of the STP with a vision of perfecting our ability to engage and involve clients in the design and refinement of program and service policies so that at the end of the day, what we deliver to clients is consistently reflective of their needs and expectations.

This is also a commitment that the Government of Canada has made to citizens through its Service Strategy and also by defining Principles for Engagement for all Departments. As a leader in client engagement, ESDC continues to embrace these principles and, through this solution and the development of this Playbook, aims to seek out innovative approaches and insights that will strengthen our ability to engage clients at all stages of policy development.

The Client Centric Policy pod (team) was formed in April 2018 and, with representation from various branches and Regions, completed two phases of work:

Phase 1 - Client-testing engagement approaches: Working with the Youth Digital Gateway pod, approaches were tested during a workshop in June 2018 and also during four crowdsourcing Policy Jams held in Winnipeg, Toronto, Gatineau and Iqaluit in August 2018. These consultations provided an opportunity for testing approaches and getting feedback from youth with unique needs (Indigenous Peoples, people with disabilities, newcomers and people living in remote areas).

Phase 2 – Development of the Client Centric Policy Playbook: Building on the Department's successes as a leader in client engagement, and on learnings from Phase 1, the pod consulted broadly both internally and externally to gather insights, best practices, tools and resources for engaging clients. User pain points and content were validated with ESDC policy and engagement experts and all ESDC employees had an opportunity to review and comment on the draft playbook.

The culmination of this work has been the development of this Playbook which captures over 1000 individual pieces of feedback from policy and engagement experts, clients, as well as from a range of staff across the country who work day-to-day serving the clients that are touched by ESDC policies. Over 100 contributors have been recognized in the development of this Playbook!

While intended to support those wanting to take a client centric approach to developing policy, many of the approaches and resources highlighted will be of interest to anyone seeking to better understand their clients' needs.

This is the first iteration of Playbook and so it has room to evolve! It is intended to become an ever-growing and evergreen reference that will strengthen our collective efforts in generating policies that will ultimately result in programs and services that consistently meet the needs and expectations defined by our clients.

1.2 Playbook Overview

Client Centric Policy Vision

Perfecting our ability to engage and involve clients in the design and refinement of program and service policies so that, at the end of the day, what we deliver to clients is consistently reflective of their needs and expectations.

Playbook Purpose

To support the Client Centric Policy vision by providing employees with insights, best practices, tools and resources for engaging clients.

Who is the Playbook for?

Policy/Service plus anyone seeking to better understand their clients' needs.

How to use the Playbook

Dynamic features have been included, such as the banner bar on the top of each page and hyperlinks in the Table of Contents, to allow you to move quickly to a topic of interest. As well, the home button on the top right hand corner of each page will always take you back to the Table of Contents.

We are always interested in your feedback. Any comments or ideas can be sent to: ESDC.CCP-PAC.EDSC@hrsdc-rhdcc.gc.ca

2.0 Engaging Clients in Policy Generation

2.1 Principles of Engagement

Public engagement is an important part of an effective, open, and transparent government. The Government of Canada has developed and is committed to demonstrating the following principles when engaging with the public:

Transparent

We communicate with Canadians about engagement opportunities. We let Canadians know the purpose of engagement and how their input will be used.

- We co-create engagement processes with stakeholders.
- We provide information that is accurate and timely.
- We ensure that people have sufficient time to prepare and participate.
- We publish summary reports online, and, when possible, input as open data.

Relevant

We listen and talk to interested and affected Canadians about issues that matter to them. When we convene participants, we are clear about what is up for discussion and the scope of change possible.

- We explain how this issue affects Canadians.
- We engage when there is an opportunity for the public to influence decisions.
- We connect people who have a stake in the issue with opportunities to participate.
- We promote a shared sense of purpose towards a better outcome.

Inclusive

We engage with people who have a range of views and perspectives that reflect the diversity within Canada. We reduce barriers to participation, whether physical, cultural, geographical, linguistic, digital, or other. We offer a variety of channels and methods through which to engage.

- We engage in a variety of locations.
- We provide information that is clearly written in both official languages.
- We provide information in alternative formats and additional languages.
- We design processes with the target audiences in mind.
- We adapt to the needs and preferences of the people participating.
- We go where the conversations are happening.
- We listen without judgement.
- We build and sustain relationships.

Accountable

We commit to sharing what we hear from participants. We explain our decisions including how input was used.

- We report back to participants soon after our conversations.
- We communicate and listen throughout the process.
- We commit resources to do what we say we are going to do.
- We demonstrate the value of participants' time by showing what has changed because they contributed.

Adaptable

We commit to learning and adapting our approaches. We promote a culture of engagement, consultation, and collaboration across the public service. We build on our successes, learn from our failures, and share our experiences.

- We define success at the outset, measure and adjust.
- We try new methods and tools, to determine the right fit for the context.
- We work with experts in other sectors to learn from them and build capacity.

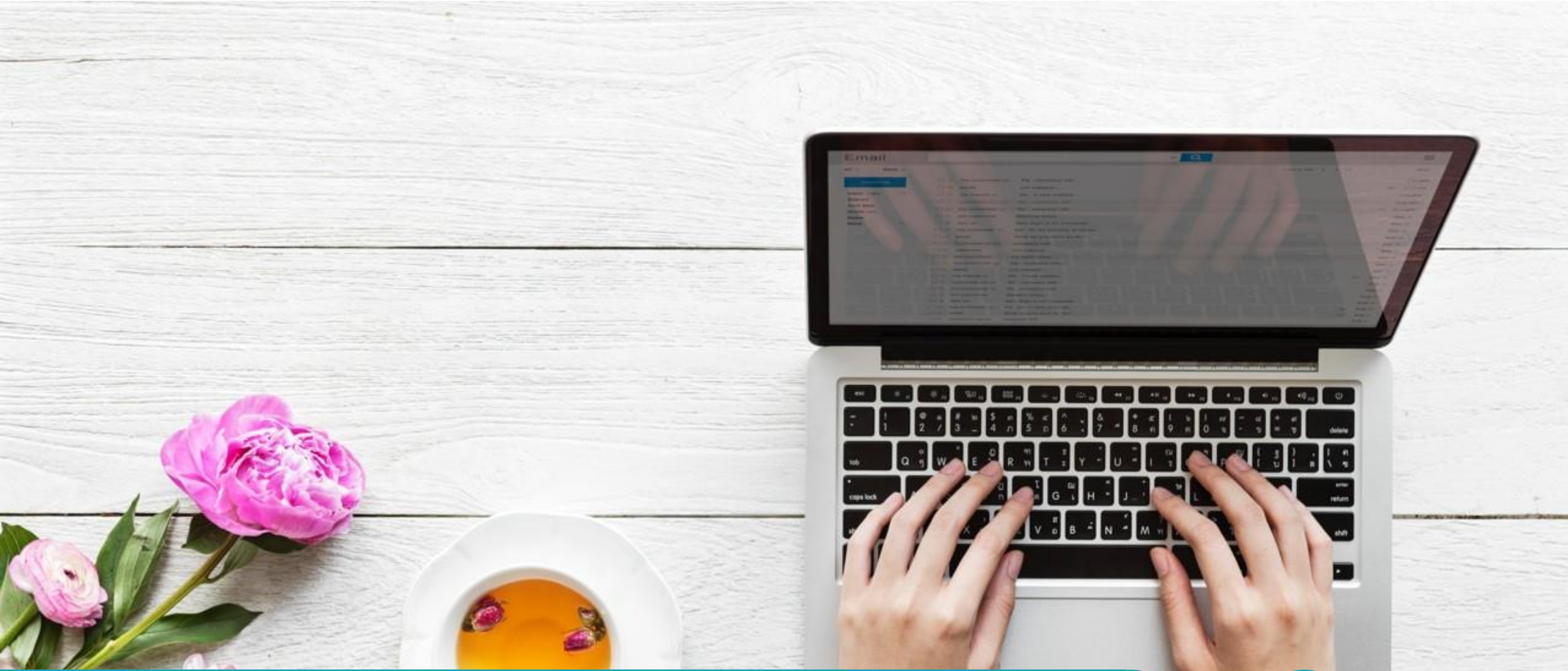
Source: Open Government, Principles and Guidelines

2.2 Opportunities for Engagement

Engagement occurs at all stages of the policy, program and service development and implementation cycle to ensure that the needs of a particular client group are met. Policy stakeholders may not be involved in all stages and the cycle may in fact be non-linear. Whether we are in a policy or operation branch or in a Region, being aware of the potential areas for engagement along this continuum is important, as it is the same client group that is often being consulted. From a client perspective, they may not see the branch and regional distinctions we make. As a result, it is essential that within ESDC, all contributors to this life cycle work closely to share client knowledge and to leverage opportunities for engaging clients in an effective and meaningful way.

Phases of the Policy, Program & Service Cycle

	Analysis & Development (may result in Memorandum to Cabinet)	Funding Program Design (resulting in Treasury Board submission)	Operational Policies	Program Implementation/ Service Delivery	Evaluation
Potential Focus Areas for Engagement	• Policy objectives • Program options, outcomes • Understanding the problem and envisioning how this problem may evolve into the future • Relationship development	• Funding criteria and terms • Success indicators • Decision-making and accountability • Relationship models • Application and assessment process • Payment conditions • Monitoring and audit • Evaluation requirements	• Application procedures • Approval processes • Service standards	• Administrative burden • Relationships • Efficiencies or inefficiencies	• Impact of program • Improvement of delivery mechanism • Continued understanding of the evolving needs of Canadians



3.0 Planning & Engagement Approaches

3.1 Planning Your Stakeholder Engagement

- The key to a successful engagement is a well-thought-out plan. The ESDC Stakeholder Relations 101 Guide, published by the Public Affairs and Stakeholder Relations Branch (PASRB), is an excellent resource that provides advice, best practices, templates and tools to support the planning and execution of engagement activities:
  - The Strategy Template will help you plan out the objectives and scope of your engagement, including strategic considerations and expected outcomes;
  - The evaluation checklist will help you plan and evaluate your activities according to the Government of Canada's stakeholder engagement guiding principles. The checklist includes sample questions to help you assess your engagement process and can be modified to reflect your needs; and
  - Other useful tools such as the Sample Budget Worksheet, tips sheets for the Venue and Facilitations, and the Diversity Tip Sheet.
- Allow sufficient time to consider things like: engaging Regions and other stakeholders in planning; client testing your approach; addressing unique client needs; applying a GBA+ lens (including taking GBA+ training), approvals; translations; privacy, legal, security, health & safety; accessibility; promotion; and measuring and sharing results. Engage clients well in advance of needing to make decisions.
- Given the size of ESDC and the potential for multiple stakeholder outreach efforts, it's important to plan ahead and take a coordinated approach to help avoid duplication and stakeholder exhaustion. Review ESDC and other public consultations and connect with internal and external partners to have a good understanding of what's been done or what's in the works.
- The following sections provide considerations and tips for selecting engagement approach(es) as well as a list of key resources and contacts.

3.2 Engagement Approaches

- There are many different ways to engage clients and other stakeholders (see "Engagement Approaches and Tools"). To determine the most effective approach(es) consider the following:
  - The goals of your engagement;
  - Who your audience is. Think specifically about all segments and apply a Gender-based Analysis Plus (GBA+) lens to determine all intersections within your client group;
  - Unique needs related to your client group (see sections on 4.0 Knowing Your Client and 4.3 Engaging Clients with Unique Needs);
  - Accessibility requirements;
  - Language, culture, privacy, legal, security, health and safety considerations (see section on 5.0 Additional Engagement Considerations);
  - Geographic location of clients and any regional differences;
  - Literacy and digital literacy levels as well as access to digital technology and high speed internet;
  - Options for promoting your engagement;
  - What consultations have already taken place and what approaches have been used by ESDC and other government departments (all levels) to determine what's worked well and if there is a danger of consultation fatigue; and
  - Your budget and capacity to plan, implement, analyse feedback and report back to clients.

- Engage clients and stakeholders such as community organizations/leaders to help determine and client-test engagement approaches.

- Consider multiple approaches to maximize your reach and allow for greater participation by all segments of your client group.

- Work with your team and the Public Affairs and Stakeholder Relations Branch to consider the appropriate level of engagement and corresponding activities. In some situations it may be possible and/or preferable to hire an outside firm to facilitate in-person or online engagement activities.

- Leverage social media to promote your engagement activities. Reported cases from provincial and municipal examples show a significant increase in participation rates when promoting with social media. For example, the BC provincial government saw a 61% increase in the number of respondents to their Distracted Driving Engagement when they used ads on Facebook. Also, where appropriate leverage community organizations, Regional client-serving staff; provincial, territorial and municipal governments; and other stakeholders to help with promotion.

- Whether engaging in-person or online, ensure your approach provides a safe environment for clients to provide their feedback.

- Have the intersectionality/diverse identities of the target groups been identified? Will a facilitator be identified that is sensitive to their needs and experiences? Have the target populations been asked who they would feel more comfortable working/collaborating with?

- Consider the impacts of interdependencies between consultations. For example: the relationship between social issues such as homelessness and mental health, and housing.

Engagement Approaches & Tools

Levels of Engagement	Information Gathering (Observing)	Informing (Communicating)	Engaging (Asking, Listening and Discussing)	Empowering (Collaborating)
Tools	• Social media monitoring • Media monitoring • Stakeholder analysis • Web metrics • Stakeholder mapping • Service observation • Shadowing	• Social media • Traditional communications • Responsive communications • Shareable content • Blog • Public hearing • Email • GCconnex/GCcollab • Twitter • Open house • Town hall • Kiosk	• Surveys • Questionnaires • Request for comment • Discussion papers • Story sharing • Feedback forms • Online forum • Poll • Blog • Video submissions • Social media • Town hall workshop • Site visit / observation shadowing • Hackathon crowdsourcing • Think tanks • Interactive tools • Open government • Roundtables • Townhall meetings • Blog, social media, GCconnex/GCcollab • Toll free lines • Focus groups interview • Site visit • Conference • Tweet Chat • Journey mapping	• Co-development • Wikis • Blogs • Group decision • Open data • Peer reviews • Crowdsourcing • Expert panel • Advisory panel • Workshop • Devolution • Online forum • Video submissions • Town hall workshop • On-site visit with group experts • Hackathon • Public roundtables

3.3 Digital Consultations

- Connecting with clients online can allow for a broader reach. It can also provide an opportunity to share ideas in written form so that your clients have time to research, analyze and prepare an informed response.

- Assess your clients' capacity to use a digital platform (ex: access to digital devices). Internet access is limited in some rural and remote areas. Identify what, if any, challenges would need to be overcome and/or consider supplementing with non-digital approaches.

- Different online engagement platforms offer a variety of tools. Things to consider include: ability to collect demographic information, participant registration vs. anonymity, ease of access, analytics and reporting, cost, social media integration, and moderation options. Consult with PASRB and seek out lessons learned from those who have used the platforms you are considering.

- A survey of Canadians visiting the ESDC internet site in 2018, as well as feedback from a focus session held with youth in June 2018, indicated that Canadians want to engage with the Government of Canada (GoC) digitally on a trusted platform that is branded and moderated by the GoC. We also heard from the focus session that youth preferred that their personal social media accounts (such as Facebook, Instagram, Twitter) not be used for engagement but can be used to drive them to a separate non-social platform.

- Work with PASRB to determine what departmental social media accounts (Twitter, Facebook, etc.) can help promote your consultation. Research any hashtags that you intend to use to ensure they haven't been utilized previously and can't be misconstrued.

- Ask community organizations to help promote your consultation through their social media accounts by providing wording for Tweets, etc.

- Develop a plan for moderation so that inappropriate comments or any personal information posted by a participant can quickly be removed.

- Incentives can help attract clients to your online consultation (ex: offer Youth wording that they can include on their resume indicating that they participated in a consultation).

- Online consultations can generate a lot of data. Consider how you will collect, analyze, store and share the information you collect. See 5.3 Privacy, Legal, Security, Health and Safety section.

- When considering digital platforms for engagement, ensure that its features meet Web Content Accessibly guidelines (WCAG) 2.0.

- Consider creating an online presence that participants can come back to for results, updates or future consultation.

- See 5.0 Additional Engagement Considerations for other tips.

3.4 In-Person Consultations

- Ensure facilitators are well trained, unbiased and keep conversation on track. Working with client's opinions can be a very sensitive matter. Many clients have experienced difficult situations. Be open for challenging conversations and be ready to empathize and have de-escalation approaches ready if need be.

- Convey integrity, transparency, commitment, accessibility, inclusivity, and confidentiality throughout your entire process by communicating and listening.

- Prior to in-person consultations, determine up front if participants are eligible for compensation for travel and consider providing healthy food/beverages, especially for an all-day or multi-day event as cost related to travel, space, time, etc. are all factors that have to be taken into consideration, especially in a country as large and vast as Canada. Note: when inviting an Indigenous Elder it is common practice to compensate them for their time.

- Begin each in-person meeting with a Territorial Acknowledgment. Indigenous Coordination and Engagement (ICE) can help you determine the appropriate acknowledgement.

- In-person engagement may allow for greater control as a moderator can ensure that everyone is receiving the same information and confirm participants' level of understanding. They can also pay attention to who is not speaking and probe further where appropriate.

- Body language and facial expressions can convey more than words and become invaluable tools, especially with highly sensitive subjects.

- An in-person meeting offers only a limited amount of time to interact with a limited number of participants.

- Keep in mind that the approach and amount of time required for discussions may vary based on group. If fluid conversations take place, consider the value of letting them run their course.

- Consider your client group's availability when determining date and time. For example, are they at school or work during the day? Do they have childcare obligations?

- Be sure to engage Regions early when thinking about in-person consultations.

- Consider whether participants can utilize virtual tools, such as webex or video conferencing.

- Some valuable training for facilitators includes: GBA+, mitigating unconscious biases, cultural awareness, using plain language and de-escalation approaches.

3.5 Tips for Planning an Accessible Engagement

- Assess your client group and identify the potential barriers they may face. These can include physical, architectural, technological, cultural, attitudinal, language and anything that hinders full and equal participation.
- Consult Planning Inclusive and Accessible Events - A Handbook for Federal Public Servants for great tips on how to incorporate an inclusive design approach.
- Plan well in advance to ensure additional services, such as sign language interpreters are available. Keep in mind how these services will affect your budget.
- For in-person engagements, consult with community organizations for suitable locations. Conduct a physical inspection of the facility you are going to use to ensure it is fully accessible. Pay attention to exterior access, transportation options, lighting and location of washrooms.
- When considering digital platforms for engagement, ensure that its features meet Web Content Accessibility guidelines (WCAG) 2.0.
- Offer multiple options for collecting input: oral, written, captioning through a scribe, video, etc.
- Consult with community organizations that work with people with disabilities to develop your engagement approaches. Don't forget to client test your approach ahead of time.
- Ask participants in advance to let you know if there is anything they require in order to be able to fully and successfully participate. Examples of accommodations include: interpretation services like American Sign Language (ASL), langue des signes québecoise (LSQ), captioning, and documents in plain language, large type or braille.
- Read about the Consultation on Accessibility where Canadians identified what an accessible Canada means to them.

3.6 Planning and Engagement Approaches - Resources & Contacts

Resources & Tools :

- ESDC Stakeholder Relations 101 Guide – provides advice, best practices, templates, tip sheets and tools to support government officials conducting engagement activities.
- ESDC open/closed Consultations – A list of consultations, useful when looking to learn from past engagement experiences.
- Consulting with Canadians is a listing of all Government of Canada's public consultations.
- GoC Public Engagement Community of Practice features consultation tools, guidance documents and good practices from across the Government.
- Public Opinion Research reports, templates and best practices.
- Participedia: Funded by Social Sciences and Humanities Research Council of Canada (SSHRC), this is a collaborative site where researchers and practitioners from across the globe catalogue and compare experiments in new forms of participatory politics and governance.
- The Designing Public Engagement Experiences kit features resources by the Public Engagement Community of Practice, stored on GCcollab.
- The Engagement Go or No Go Tool will help you quickly determine where and when engagement may be appropriate.
- The Government & Public Sector Practice: The Leaders' Report – Increasing Trust Through Citizen Engagement is an overview of how government communicators in 50 countries are thinking about citizen engagement.
- Consultation Framework – A Guide to Undertaking Consultations by the Department of Fisheries and Oceans.
- How to Host a Tweet Chat - A GOC Playbook - Contact PASRB through your communications advisor.
- Planning Inclusive and Accessible Events - A Handbook for Federal Public Servants
- Public Engagement Case Studies – A showcase of GOC public engagement, sharing lessons learned, and illustrating the decision making process when engaging the public in large-scale projects.
- ESDC Innovation Lab: Listing of tools and methods, some of which can be applied to the engagement process.
- City of Vancouver Engagement Principles – The six principles that guide community engagement in the city of Vancouver.

Contacts:

- For questions on consultations and engagement, contact PASRB.
- For a full listing of supports available see Appendix 4.

4.0 Knowing Your Client

4.1 Knowing Your Client

- Hearing directly from your clients on what their needs are is paramount.
- Keeping a continuous pulse on your client group helps you to be proactive in addressing and assessing needs.
- Having an in-depth knowledge will help you to form stronger relationships and enable you to plan more effective consultations.
- You are likely not the only one interested in the needs of your particular client group. Up-to-date client segment information is available through ESDC; other federal departments; provincial, territorial, and municipal governments; and other stakeholders. Learn from consultations that have already taken place both within ESDC and beyond. Leverage and collaborate where you can.
- Client groups can be complex, with multiple segments and intersectional identity factors. As well, a client's culture, language, accessibility and other factors all play a role defining them. For example, youth can be defined as newcomers, First Nations, Inuit, Métis or non-affiliated Indigenous youth, vulnerable youth, youth with disabilities, youth in custody, youth in care, students, youth not in school, etc.
- Spend time with employees who deliver services and programs directly to your client group. The Regions have invaluable networks and knowledge as well as an important perspective that can help you better understand client needs, particularly if there are regional differences.
- Don't assume a particular client segment has the same needs right across the country.
- Engage with people with different lived experiences and consult with organizations that work with your client group to better understand their perspectives.
- Seek out opportunities in your community (or when you travel) to learn about your client. Example: visit an event put on by a local community organization.
- When getting to know your client, look for barriers that may limit their participation in consultations so that you can develop mitigation strategies.
- GCconnex, and GCpedia are great knowledge banks of information that allow you to post questions about your engagement and connect with others in the federal government who have experience and can share best practices. GCcollab offers the same ability to connect but with external users.

4.2 Leveraging Existing Resources

While this is not an exhaustive list, here are some examples of great resources to explore:

ESDC		Other Government of Canada Resources
• Audience segmentation cards by key population groups and sub-groups, contact the Marketing team at PASRB. • ESDC Labour Market information • Information regarding ESDC open & completed Consultations contact: PASRB. • Weekly Public Environment Scans grouped by target audience. • ESDC Innovation Lab GC websites: GCConnex; GCCollab; GCPedia.	• Public Opinion Research (POR) – including Data Profiles research topics related to ESDC policies and programs. • Research completed by the CX/UX team of TISMB • ESDC Innovation Lab SharePoint – The home page for a multi-disciplinary team within ESDC, that consults with Canadians to inform policy, program or service design. • ESDC Innovation Lab Projects: – Information about engagement projects undertaken by Innovation Lab.	• Statistics Canada has detailed information on various client groups. • Consulting with Canadians is a listing of all GOC public consultations, including summary reports from past consultations. • GC Collab Policy Community – Log into GC Collab and type *The Policy Community* in the search for groups option. You can connect with and learn from policy makers and shapers from across the federal public service and beyond. • Introduction to Gender-based Analysis Plus

Note: links to specific information related to Indigenous Peoples, newcomers, youth, seniors, persons with disabilities and clients living in rural and remote areas can be found in the Engaging Clients with Unique Needs section of the Playbook.

4.3 Engaging Clients with Unique Needs

Determine who will be affected most by the policy that you are revising or creating and pay attention to segments that have unique needs and whose voices may not always be heard. By having a good understanding of these clients, you can develop effective approaches for engaging them in a respectful and sensitive manner.

While there are many client groups and sub-groups with unique needs, in this first iteration of the Playbook, we have focussed on:

- First Nations, Inuit, Métis and non-affiliated Indigenous Peoples;
- Newcomers;
- Youth;
- Seniors;
- People with disabilities; and
- People living in rural and remote locations.

Some other examples to consider include: homeless, LGBTQ2+, women fleeing violence, people who are incarcerated and/or previously incarcerated, youth in care, people with mental health issues, non unionized and vulnerable workers, and visible minority groups.

In addition to engaging clients directly, if you want to get additional insights on unique needs, reach out to Regional staff or community organizations who interact on a daily basis with your client group of interest.

> *"I'm really excited about the Playbook. My team deals with youth employment and we routinely engage our stakeholders – youth, employers, service providers. The playbook will help us to be more systematic and approach engagement in a way that puts these people and their needs first."*
> *– Shannon Brown, Policy Analyst, Skills and Employment Branch, ESDC*

4.4 Engaging Indigenous Peoples (First Nations, Inuit, Métis, and non-affiliated Indigenous Peoples)

The Government of Canada is committed to reconciliation with Indigenous Peoples through nation-to-nation, government-to-government, and Inuit-Crown relationships based on respect and partnership. Client centric policy can act as an important mechanism for reconciliation. Specifically, the Government of Canada can demonstrate its recognition of rights, respect, and co-operation with Indigenous Peoples by partnering with them as equals in the policy generation, implementation and evaluation processes. Involving Indigenous Peoples in the creation of policies is not only the right thing to do, and a best practice for creating sound policy, it is also a legal obligation under certain Modern Treaties and Self-Government Agreements.

- First Nations, Inuit, Métis and non-affiliated Indigenous Peoples are diverse and it is important to recognize that:
  - First Nations are actually distinct nations with cultures, languages and realities of their own; and
  - First Nations, Inuit, Métis and non-affiliated Indigenous Peoples are diverse in their composition (example: women, youth, persons with different abilities, living in urban areas, living in rural or remote areas, both on and off reserve for First Nations). All have unique needs, perspectives, preferences and histories. Acknowledging this diversity during your partnership will not only improve the quality and accuracy of your engagement, it will also demonstrate respect.

- One of the most important steps to becoming better partners to First Nations, Inuit, Métis and non-affiliated Indigenous Peoples, especially during the policy creation process, is to learn their history by:
  - Recognizing the intergenerational impacts of colonization, residential schools, attempts at forced assimilation, and cultural genocide;
  - Recognizing the critical roles Indigenous Peoples have held in the creation of what we now know as Canada, past and present; and
  - Entering each partnership as informed as possible about the role, priorities, needs, and aspirations of the specific First Nations, Inuit, Métis and/or non-affiliated Indigenous Partner(s) you are working with.

- Deepen your knowledge by participating in training offered through Saba and the Canada School of Public Service, and through cultural activities offered in your community.

4.4 Engaging Indigenous Peoples – continued

- Given Canada's commitment to implementing the Truth and Reconciliation Commission Calls to Actions and the United Nations Declaration on Rights of Indigenous Peoples (UNDRIP), our Indigenous partners may expect that they can and should have meaningful influence at each stage of the policy and legislative development processes. Federal officials must be open and honest with co-development partners about: objectives; expectations; the constitutional and legal requirements to protect and uphold Cabinet confidentiality; the stages and extent to which influence can be achieved; and timelines.

- For best outcomes, work with ESDC's Indigenous oh non and Engagement (ICE) team. They have a lot of experience with Indigenous affairs and are well equipped to provide advice.

- First Nations, Inuit, Métis and non-affiliated Indigenous partners are the experts on the needs, goals and perspective of the people they represent. Treat them accordingly by working with Indigenous Leaders/partners to determine their desired level of involvement and the best engagement approach for them and the people they represent. Ensure that the chosen engagement approach includes engagement at both the community and individual level, so that needs of the rights-holders themselves can also be assessed. (Note: national Indigenous organizations are often political and advocacy groups).

- Respect the government, community, group or organization's decision-making processes by ensuring adequate timelines for community consultation and collective decision-making.

- Regions are a good resource to consult with during engagement planning. They also have established relationships with Indigenous leaders/partners that can be leveraged.

- When collaborating with Indigenous partners, Elders can play an important role as facilitators, translators and for emotional support. Consult the First Nations, Inuit and Métis Elder Protocol Guide for more information.

- It is a best practice to begin each meeting/engagement activity with a Territorial Acknowledgment. ICE can assist with determining the appropriate acknowledgement for your location.

- Adapt engagement approaches to ensure you can accommodate/reach those who might be located in rural or remote areas, while not neglecting urban Indigenous populations.

- Make arrangements and allow sufficient time for spiritual and emotional support (in person if possible) especially if engagement questions have the potential to touch on traumatic histories. Draw on help from Elders, community leaders and other resources listed in this section.

- Indigenous Partners are often highly solicited by Government and may not have the resources to respond. Reduce "consultation fatigue" by consolidating and coordinating your engagement request among federal departments and leveraging feedback from previous engagements.

- Consider whether interpretation services will be required.

4.4 Engaging Indigenous Peoples - continued

Resources & Tools :

- GCPedia Indigenous Reconciliation at ESDC, managed by ICE – including a calendar of upcoming ESDC Indigenous engagement activities.
- Tools for consulting and engaging with Indigenous Peoples.
- Principles respecting the Government of Canada's relationship with Indigenous peoples.
- W-T Region Indigenous Engagement Tool – summarizing the principles, tools, and methods for engaging Indigenous peoples by the WT Region.
- Indigenous Corporate Training Inc. : Engagement/Partnering Guides to help everyone work effectively with Indigenous Peoples.
- Twitter News and updates about GOC and Indigenous Partnerships.
- Truth and Reconciliation Commission of Canada – provided those directly or indirectly affected by the legacy of the Indian Residential Schools system with an opportunity to share their stories and experiences.
- Information and History about Indigenous, First Nations, Inuit, Métis, and Urban Indigenous – provided by Crown-Indigenous Relations and Northern Affairs Canada.
- Indigenous Cultural Awareness Committee – tools and resources for Indigenous cultural awareness within ESDC.
- Recent ESDC Indigenous Consultations: Indigenous Early Learning and Childcare; Consulting Canadians on Poverty Reduction.
- The Indigenous Employees' Circle (IEC) is the network for First Nations, Métis and Inuit employees of the Department to share, learn and connect with their Indigenous and non-Indigenous colleagues. The network also promotes awareness of Indigenous cultures, and provides a forum for departmental consultation on issues and policies that impact First Nations, Métis, and Inuit employees.

Contacts:

- Indigenous Coordination and Engagement (ICE) NC-ICE-MAC-GD@hrsdc-rhdcc.gc.ca.
- Contact Modern Treaties Unit to help determine whether there is a legal obligation to engage Modern Treaty and Self-Government Agreement Holders.
- Regional Indigenous Program Delivery teams.

4.5 Engaging Newcomers

There are several newcomer groups: permanent residents, foreign workers, temporary foreign workers, students, refugees, and others, all of which have their unique stories, experiences and perspectives.

- It is important to keep an open mind when speaking with newcomers. Clear communication and mutual understanding are key.
- For some newcomers, the fear of not integrating may lead them to agree with you when, in fact, the meaning is unclear to them. For in-person consultations, create an environment where participants know it is safe to seek clarification. Repeat back what was said and allow time for participants to confirm their perspective. Keep questions simple and clear (use plain language).
- The starting points for adapting to life in Canada vary according to several factors: where people have come from, their migration experience, and current living conditions. Allow time to fully understand the client journey as it may be different than what you are familiar with.
- It is important to remember that some newcomers have survived very difficult circumstances. Being mindful and empathetic of their experience will go a long way towards facilitating their participation.
- Reach out to community organizations who already have an established relationship with your client segment. Build partnerships, but seek out a variety of organizations to allow for varying views.
- Consider the various cultural and language accommodations that may be required to make the client feel at ease. Offer multiple methods for communication such as voice recorders, written activities, etc.
- Consider clients' religious requirements and faith-based needs, and how they may impact their experience. For example: avoid hosting consultations during holidays and/or religious dates, be aware of dietary restrictions and requirements, and ask if there is a gender-preference for the consultant/facilitator that they work with.
- Consider offering the engagement in a language of choice and using interpretation to facilitate understanding and clear communication.
- It is important to note that there may be power imbalances within a community that make certain individuals more comfortable speaking out than others. Pay attention to internal dynamics and create a safe space wherein everyone is given the opportunity to share their perspectives. This may require creating women-only spaces, for example.

4.5 Engaging Newcomers - continued

Resource & Tools :

- Summary of the Online consultation undertaken by the Panel on Employment Challenges of New Canadians.
- Fact-Sheets on racialized poverty including immigration and newcomer settlement.
- Information on engaging with newcomer youth
- Key results from the 2016 Census on Immigration and ethno cultural diversity.
- Immigration, Refugees and Citizenship Canada Public Consultations – A list of past and present consultations, useful when looking for examples of how to engage newcomers.
- Immigration and Diversity: Population Projections for Canada and its Regions, 2011 to 2036 – A report that includes: projections; a regional analysis; information on language, visibly minority status, and religion.

4.6 Engaging Youth

- Approximately 1/4 of Canada's population are youth. Ranging from ages 15-30, the youth client group is not homogenous and intersecting identity factors need to be considered.
- While youth may prefer to use technology and the internet, in-person engagement can still be an effective tool, particularly for reaching marginalized youth who may not be as digitally connected and/or may need encouragement to actively participate.
- To help generate more meaningful feedback, include youth when you design and test your engagement approach. During the consultation, consider offering options that allow for creative expression and the ability to choose how youth will provide their feedback.
- While some youth may be okay with using their personal social media accounts for promotion of a consultation, they may prefer participating in a trusted government-moderated platform.
- Using short interactive activities where youth describe their own personal journeys may be more effective than simply asking them questions.
- Facilitators need to be ready to modify activities to accommodate certain participants, for example: use a scribe to help participants capture written input, break into smaller groups to maximize engagement, and allow other ways to capture their thoughts such as the option of using voice recorders or video.
- To create a welcoming and inclusive environment, select facilitators who are members of the group you are engaging with, for example: First Nations, Inuit, Métis and non-affiliated Indigenous Peoples, visible minority, youth, etc.
- For in-person engagements, choose locations that are easily accessible to youth. Consider space at a familiar community organization and that is accessible by public transit.
- Community organizations are a great resource for recruiting youth from unique segments. Regions can also be leveraged for insights and networks.
- To reach homeless youth, consider partnering with youth homelessness organizations or a local shelter that may have already established a level of trust with youth. They may also be willing to transport youth to the engagement and to pass along communications.
- Consider incentives such as formal written acknowledgement of their contribution (e.g. certificate of participation or wording they can use in their resume).

4.6 Engaging Youth - continued

Resources & Tools :

- Statistics Canada – A Portrait of Canadian Youth
- YouthREX : Youth research conducted by the Government of Ontario.
- Youth Engagement Toolkit – A guide by the Pan-Canadian Joint Consortium for School Health intended to provide a how-to resource of effective practices to support youth engagement.
- Canada's Youth Policy

Contacts:

- PASRB Marketing team - to access audience segmentation cards for Youth, (Post Secondary Student, In the Workforce, and Grads Starting Careers).
- Program Operation Branch – Labour Market and Social Development Programs (LMSDP) – Program and Services Oversight : NC-CSJ-INTERNAL-EEC-INTERNE-GD@servicecanada.gc.ca.
- Skills and Employment Branch Distribution list – Youth and Skills Innovation.

4.7 Engaging Seniors

- The seniors' demographic is a wide and varied group. In addition to segmenting by age, there are many other subgroups to consider such as: ethnicity, gender and sexual orientation (LGBTQ2+), low income and First Nations, Inuit, Métis and non-affiliated Indigenous Peoples.
- Community organizations, Regional delivery staff and provincial/territorial/municipal governments can provide knowledge and insights relating to seniors' demographics, stakeholder networks and engagement approaches.
- In addition to traditional communications, such as face-to-face, phone and print, online engagement and social media can be effective for engaging with some segments.
- To engage with seniors in a meaningful way, it is important to be respectful and to avoid paternalistic or condescending language.
- Negative attitudes, myths, and stereotypes regarding ageing should be identified and addressed to ensure they do not influence the engagement process.
- Other important considerations include: mobility issues, print size (larger font for printed materials), hearing ability, transportation and accessibility.

Resources & Tools:

- Better Together: A Practical Guide to Effective Engagement with Older People, published by the Government of South Australia.
- Data profile on seniors
- ESDC Audience Segmentation Cards upon request (PASRB Marketing team).

Key Contacts:

- Seniors Partnerships and Engagement Unit, ISSD: Neil Burron
- New Horizons for Seniors Program, ISSD
- Old Age Security Policy and Public Pensions Statistics: Kevin Wagdin
- Canada Pension Plan Policy and Legislation: Neal Leblanc

4.8 Engaging People with Disabilities

A disability is defined as a physical, mental, intellectual, learning, communication or sensory impairment or as a functional limitation- whether permanent, temporary or episodic in nature that, in interaction with a barrier, hinders a person's full and equal participation in society.

- Through the Accessible Canada Act (Bill C-81), the Government of Canada aims to ensure equity and full participation in society for all Canadians by proactively eliminating barriers and promoting inclusion for people with disabilities.
- Actively engage people with a range of disabilities throughout the policy development/refinement process to create equity and ensure potential barriers are addressed.
- When developing and testing your engagement approaches, consult with knowledgeable resources such as: community organizations; ESDC Office for Disability Issues; Regional expertise on delivering programs and services to people with disabilities; and/or the ESDC Employees with Disabilities Network.
- Consider intersectionality identity factors. Some people with disabilities live in poverty, are victims of violence and engage the world not just through their disability, but through all the intersections who make them who they are. No two people experience the same disability the same way.
- Be aware that some people may have more than one disability. Many disabilities are not visible, such as learning disabilities, chronic pain, mental health issues, and episodic disabilities. The disability that causes the most difficulty may not be the most obvious one, so do not make assumptions based on what you observe and never assume a lower level of intelligence associated with a disability.
- Be mindful that not everyone with a disability wishes to discuss the barriers they face.
- For additional considerations related to accessibility, consult the 3.5 Tips for Planning an Accessible Engagement.

"When we talk about an accessible Canada, what we're really talking about is creating an inclusive society where all Canadians have an equal opportunity to succeed, and are equal participants. Together, we can make it happen."
– The Honourable Carla Qualtrough, former Minister of Sport and Persons with Disabilities

4.8 Engaging People with Disabilities - continued

Resource & Tools:

- Accessibility Canada Act
- ESDC Consultation on Disability and Accessibility
- Government of New Zealand Guide to Engagement with People with Disabilities
- Tips for engaging with different disabilities – University of Washington Disability Resources for Students.
- Free online training about engaging people with a range of communications disabilities Communication Disabilities Across Canada.
- Planning Inclusive and Accessible Events - A Handbook for Federal Public Servants.
- Elise Roy Ted Talk – When we design for disability, we all benefit.

Key Contacts:

- Office for Disability Issues
- ESDC Employees with Disabilities Network
- ESDC Diversity Network

4.9 Engaging Clients Living in Rural and Remote Areas

Almost one fifth of Canadians live in rural and remote areas. This is important to remember when planning your engagement activities since reaching out to clients living in these areas may not always work using conventional methods.

- If you want to get a good appreciation of some of the unique challenges, engage early with regional staff living and working in rural and remote areas. Regions also have established relationships and networks that can be leveraged.
- Community organizations, and local, provincial, and territorial government staff are also a good source for collaboration, including advising on engagement approaches, assistance with recruitment, and finding meeting space. They may often be willing to help with local promotion.
- Internet access and video conference may be limited in some communities necessitating the need to interact using other methods. When planning engagement activities, do not make assumptions. Consult with someone "on the ground".
- For digital, teleconference and video consultations, make sure to research and test the connectivity and accessibility ahead of time and have some back up options. Some website features or things like videos may not function properly and could take longer to load.
- In a community where agriculture, hunting or fishing is the driving economic factor, be respectful of growing seasons, harvest, etc. and provide sufficient notice of the engagement activity/process.
- If you find yourself needing to visit a community without commercial accommodations, other options to explore include: nurses' quarters, other federal department housing and local homes. Don't forget that you may also need to bring your own food or water.
- Ensure your mode of travel is safe. Ex: some communities are only accessible by roads during certain months. Connect with local Service Canada or other government staff ahead of time to get advice on safe travel. Note: some remote areas have limited or no cell coverage.
- The local community may also be a great source for information and for help promoting your consultation through the local social media, radio, and networks.

4.9 Engaging Clients Living in Rural and Remote Areas - continued

Resources & Tools:

- Global Affairs Canada consultation where radio broadcasting was used to engage clients in hard to reach places.
- Engaging remote Marginalized Communities – A research article outlining online research methods that can be used to engage remote and marginalized communities.

Key Contacts:

- Regional staff living/working in rural and remote areas.
- Program Operations Branch and Income Security and Social Development-Community Development - HPS Directorate for Reaching Home (formerly, Homelessness Partnering Strategy).
- Program Operations Branch and Income Security and Social Development-Community Development - Social Programs Division for New Horizons for Seniors Community Engagement Plans.

4.10 Engaging Stakeholders Beyond the Client

- Stakeholder are defined as individuals, groups or organizations that have an interest and/or stake in the Department's policies, programs or service offerings. They include, but are not limited to, citizens, interest groups, associations, sector representatives, private companies and academics.
- It's important to define your stakeholders prior to any engagement activities. Stakeholders can help you better understand your client group and segments and can also help determine effective approaches for gaining their trust and engaging the people that the policy most affects.
- Think broadly about stakeholders and do not limit to those that are currently funded or agree with existing policies. It is important to hear differing points of view.
- Think about intersectional considerations and apply a GBA+ lens.
- Public Affairs and Stakeholder Relations Branch has tools that can help you, like Audience Segmentation Cards, personas, analytics reports, and more. See resources, tool and contacts in the Planning and Engagement section.

Note: Indigenous groups generally prefer to be acknowledged as "partners".

5.0 Additional Engagement Considerations

5.1 GBA+ Considerations

What is Gender Based Analysis Plus (GBA+)?

Gender-based Analysis Plus (GBA+) is an analytical tool and process used to assess how diverse groups of women, men and non-binary people may experience policies, programs and initiatives.

The "plus" in GBA+ acknowledges that GBA goes beyond biological (sex) and socio-cultural (gender) differences. We all have multiple identity factors that intersect to make us who we are. GBA+ ensures a greater understanding of the intersection of sex and gender with other identity factors that include race, national and ethnic origin, Indigenous origin or identity, age, sexual orientation, socio-economic condition, place of residence and disability.

The ESDC Service Transformation Plan aims at giving clients the ability to actively participate in the policy generation process. In keeping with the Government's ongoing and renewed commitment to diversity and inclusiveness, we are incorporating steps that ensure consideration of GBA+ when developing and refining policies. This approach will ensure sustainable application of GBA+ throughout the policy life cycle, including designing of questions for potential crowd-sourcing activities, outreach and engagement strategies.

We often assume that our work or our policies apply to everyone equally and there are no gender or diversity issues to consider.

GBA+ helps us recognize and move beyond our assumptions, uncover the realities of people's lives, and find ways to address their needs. We can only know if a group is affected differently if we explore it using GBA+. Incorrect assumptions can lead to unintended and unequal impacts on particular groups of people. You can begin to challenge your assumptions and apply GBA+ to your work by asking these key questions:

1. Do I believe that the issues I work on are gender neutral, culturally neutral and/or ability neutral? Are my beliefs based solely on my own experience?

2. Is it possible that my assumptions prevent me from asking questions and hearing or understanding answers that are outside my own experience?

3. How might attitudes and norms – my own, those of my organization, and those of the institutions and society that surround me – limit the range of policy options I consider and propose?

5.1 GBA+ Considerations – continued

The application of GBA+ is an integral part of Client Centric Policy. At its essence, GBA+ recognizes the complexity of each individual, and takes a "whole-person" approach to understanding how different aspects of a client's identity can interact to affect their client service experience.

The use of GBA+ requires that the person using the tool assess how their own identity shapes how they perceive the service and its target client base. By promoting an awareness of biases (both negative and positive), GBA+ underscores the importance of moving beyond assumptions and instead engaging with clients to better understand their needs.

Engaging early on, throughout the policy life cycle (from issue identification to evaluation) and using the tools highlighted throughout this playbook, will ensure that the perspectives of a broad range of clients are captured. This provides valuable insights that can help identify potential gaps as well as opportunities for improvement.

Inclusive engagement is necessary for inclusive design; when we ensure that all clients are heard from and that no one is excluded, we are able to design human-centric services that reflect the diversity and complexity of the people we are trying to serve.

How do I apply GBA+?

When applying GBA+ consider using existing tools and resources like the Intersectionality Job Aid. This tool can help you reflect on people's multiple identify factors, and how that may impact their experiences.

Tools & Resources:

Department for Women and Gender Equality (including free training course on GBA+) :

Introduction to Gender-based Analysis Plus (GBA+)
Demystifying GBA+ Job Aid
Intersectionality Job Aid
How to Apply GBA+

Key contacts:

Reach out to our departmental GBA+ specialists via email for help in developing polices incorporating GBA+.

5.2 Culture and Language

When engaging clients and stakeholders, be mindful that our clients come from a number of diverse cultural backgrounds and that they may not necessarily be sufficiently fluent in either English or French to fully participate in your engagement activities. As a result, it is important to research your client group well to understand and appreciate any cultural or language needs that should be taken into consideration.

Culture refers to the history, language, traditions, beliefs, and ideas shared by a group of people. Culture determines how people see the world and their place in it. Therefore, it is important to understand and respond effectively to the unique cross-cultural and linguistic needs of our clients.

- Connect and consult with community organizations to learn about their culture and unique practices. Consider participating in a community event as a great way to expand your knowledge.
- Consult with Regional and Provincial/Territorial staff who have experience serving the particular client group in order to leverage their learnings and best practices.
- Demonstrate openness to exploring issues from the point of view of the client's culture.
- Double check you are not organizing activities on days that conflict with cultural holidays or events.
- For clients who do not speak either official language, utilize interpretation services. In the absence of a trained interpreter, enlist a volunteer or volunteer organization within the community to assist. Be sensitive to clients' right to privacy and their choice of who should act as an interpreter.
- Consider whether the stakeholder community is part of an Official Language Minority Community (OLMC), as this may impact the materials, format and/or organization of the engagement.
- Remember that under the Official Languages Act (OLA) ESDC has obligations relating to services in official languages.
- Try to keep communication as simple as possible to avoid confusion and misinterpretation; avoid the use of jargon and/or acronyms that are specific to the government.
- When consulting with First Nations, Inuit, Métis and non-affiliated Indigenous Peoples, consult with ESDC's Indigenous Coordination and Engagement unit and consider inviting a First Nations, Inuit, Métis or non-affiliated Indigenous Elder (as appropriate) to facilitate or assist with discussions. Consider providing documents in advance and if possible in the Indigenous language(s) of the participants.
- Where required, ensure that facilitators are fully bilingual and can engage meaningfully, understanding the nuances of both the English and French language. Remember to ensure that translation timelines are taken into account when developing a document to share.

5.2 Culture and Language - continued

Resource & Tools:

- An interpreter works with spoken language, often translating and mediating between two languages in both directions, on the spot, without the aid of a dictionary. The website Kids New to Canada has tips on what to consider when choosing an interpreter.
- Links to specific information related to Indigenous Peoples, newcomers, youth, seniors, persons with disabilities and clients living in rural and remote areas can be found in the "Engaging Clients with Unique Needs" section of the Playbook.

Key Contacts:

- For interpretation and application of the Official Languages Act (OLA) contact the Official Language Centre of Expertise.

5.3 Privacy, Legal, Security, Health and Safety

Privacy and Legal

Citizen engagement is about collecting opinions, emails and sometimes demographics. There are several laws which play a significant role:

- The Department of Employment and Social Development Act;
- The Privacy Act;
- The Access to Information Act and;
- The Canadian Charter of Rights and Freedoms.

With any government engagement initiative, including face-to-face events, you must assess privacy risks and mitigate any privacy concerns. Depending on the tools you wish to use, you will need to consult and get advice on privacy considerations and whether a Privacy Impact Assessment (PIA) is required. For more information on the appropriate privacy assessment please contact Privacy Management Division.

- If you are collecting personal information ensure participants provide written consent and that you are taking measures to safeguard the information. It's important to consider how information is transported, stored, accessed and destroyed.

- Use a respectful approach to data collection; consider whether the information you are asking for is necessary, and analyze how you are asking for it.

- Information provided for ESDC consultation and engagement activities should not include any identifying personal information about the participant or anyone else other than name, organization and contact information.

- If engagement activities are contracted to a third party, ensure that appropriate privacy clauses are included in the contract. This can be discussed with the Privacy Management Division who will engage Legal Services if required (example: intellectual property).

- If you intend to photograph or record your engagement activities, ensure you have participants' written consent (this includes using photos for social media and/or reports).

- Remember that individuals have the right to the protection of, and access to, any personal information you collect.

Security, Health and Safety

- Ensure measures are taken to safeguard government assets and collected information. Provide clients and all ESDC employees a safe and healthy environment during both in-person and on-line consultations.

- Make sure that on-site Service Canada staff and/or security personnel are informed that your engagement is going to take place and that they are sensitized to the nature of the engagement (including potential for escalation) and the needs of the participants.

5.3 Privacy, Legal, & Security - continued

Resources & Tools:

- Privacy Management Division – The departmental focal point for managing privacy policy and implementation of the Departments Privacy Management Framework.
- ESDC Consultation and engagement activities privacy notice statement
- ESDC Information Management – A webpage providing information, Tools, Resources and links for all thing related to Information Management.
- ESDC Information Classification Tool – A guide to aid in proper handling and protection and handling of information.
- Security Code of Practice – A code which aims to provide brief, practical and comprehensive guidance for employees on their roles and responsibilities concerning key areas of security within ESDC.
- Occupational Health and Safety Program – A webpage highlighting rights, responsibilities, and tools and resources related to occupational health and safety.
- Workplace Violence Prevention – A webpage highlighting tools and training for the prevention of workplace violence.
- Working Alone Guide – A pdf guide for the mitigation or elimination of potential risk of injury and illness for when employees are working alone.

Key Contacts:

- For privacy advice and guidance requests : NC-Privacy-Protection_Rens_Pers-GD@hrdc-drhc.net.
- ESDC's Harassment Centre of Expertise advisors offer consultations to employees who may feel that they are being harassed.

6.0 Measuring & Sharing Results

6.0 Measuring & Sharing Results

When preparing your engagement plan, think about how you are going to measure success, in particular, how you are going to demonstrate outcomes to clients and stakeholders. Providing feedback to clients you've engaged with and closing the loop on your engagement process is important for building trust and respect, as well as truly demonstrating that a client-centric approach was taken. It's also a way of letting people know that their contribution was valuable and helps you solidify your relationship with participants.

Key Points/Best Practices to Consider:

- Publish the results of the consultation online or in a report and make it available to anyone who participated. This gives stakeholders the opportunity to confirm that you have recorded their input accurately.
- Loop back to clients/stakeholders to double check information, test stakeholder reactions, and get buy-in prior to moving forward.
- Inform stakeholders on how their information is being used and any potential impacts.
- Let the stakeholders know how or if it will affect the decision-making process.
- Use the 101 Guide evaluation checklist to ensure that when your engagement activities are completed you can demonstrate adherence to the Government of Canada Principles of Engagement.
- While there are not always immediate results that can be reported after an engagement (particularly when engagement takes place early on in the policy lifecycle), validate findings with clients in a timely manner and share the steps in your consultation process and how their feedback will be used. Look for a way to loop back at the end of the process (see examples).
- Create awareness of your engagement results internally within the department. Many of our programs share common clients and others likely have an interest in your findings and may want to leverage your work. Utilize tools such as GCconnex & GCcollab to spread the word about your engagement and to network with others.
- Review the goals established at the outset of your engagement and use these to help define your key performance indicators as a tool for measuring the impacts of your engagement.
- Global Affairs Canada case study: International Assistance Review shows examples of how to analyze feedback by theme.

6.0 Measuring & Sharing Results - continued

Examples of Feedback Mechanisms for Reporting Back:

- Written reports online and in print
- Video posted online (make sure to include written transcript as well)
- External Communications (ex: Media Release, Social Media, etc.)
- Follow up Meetings online or in person
- Email asking for validation of what we heard

Examples of Consultations where Results were shared:

- Canada's Feminist International Assistance Policy "What We Heard" Report
- Employment Insurance Special Benefits online consultations Executive Summary
- Canada's first Poverty Reduction Strategy "What We Heard" Report
- Nutrition North Canada's Case Study where feedback was shared in multiple indigenous languages
- Treasury Board of Canada Secretariat's "What We Heard" – Summary Report on Open Government Consultations

7.0 Contributors

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"Really happy to have been a part of the creation of this playbook and to have contributed to this work. This will be a very useful resource for all analysts across ESDC".
-Sania Rahman, Income Security and Social Development, People with Disabilities

8.0 Appendices

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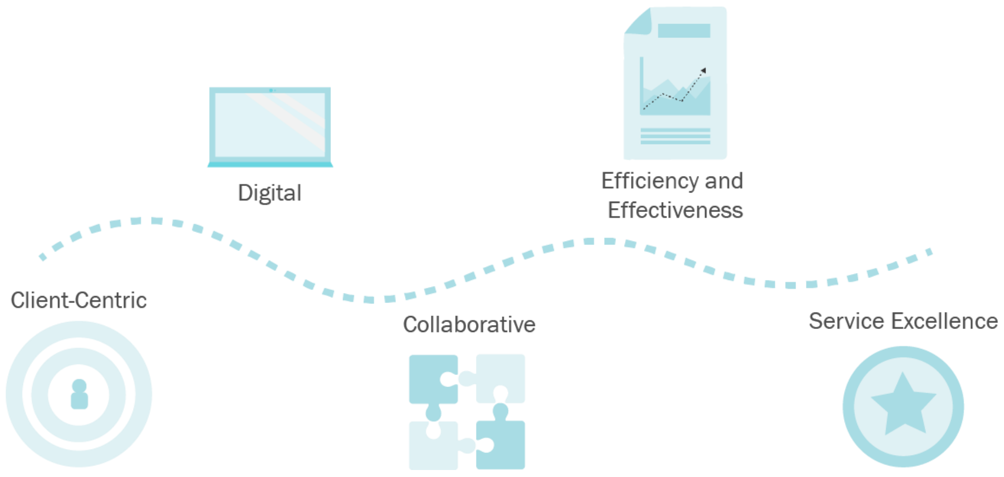
Appendix 1: ESDC Service Strategy Overview – “What is the Service Strategy?”

Each day, the Government of Canada interacts with millions of Canadians by delivering services that play important roles in their lives. Canadians expect these services to be high-quality, easy-to-access, simple, and secure – while also being responsive to their needs in a rapidly changing world.

As leaders in service excellence, ESDC is adopting world class service delivery models enabled by modern technologies to provide more services online and deliver services in a way that responds to our clients’ current and emerging needs. To achieve this, the department developed the **ESDC Service Strategy** to serve as a department-wide modernization plan of action that embraces our commitment to service excellence and transforming the way we deliver services to clients, communities, and organizations.

At the core of the ESDC Service Strategy are **five principles** that will guide our service delivery modernization efforts. The guiding principles will advance the achievement of **five aspirational goals** resulting in important service changes for Canadians.

ESDC Service Strategy Principles



ESDC Service Strategy Goals

- **Goal 1:** Client can complete all services using digital self-service
- **Goal 2:** Clients can access bundled and connected services seamlessly across channels
- **Goal 3:** Clients receive high quality, timely and accurate services
- **Goal 4:** Clients needs are anticipated
- **Goal 5:** Organize to efficiently and cost-effectively deliver on the vision

Appendix 2: Service Transformation Plan (STP) Overview

To achieve the goals and commitments of the GC and ESDC Service Strategy, and the recommendations from the Employment Insurance Service Quality Review (EI SQR), the department launched the **Service Transformation Plan** (STP). This Plan serves as the roadmap for the transformation and modernization of ESDC's services, and advances its vision for improved service delivery.

Development of the Service Transformation Plan (STP)

GC Service Strategy

- Client-driven design and delivery across channels
- Easy online services
- Seamless delivery

ESDC Service Strategy

- Client-centric
- Digital
- Collaboration
- Efficiency and effectiveness
- Service excellence

EI Service Quality Review

- A citizen-centric approach to service delivery
- Effective citizen feedback strategies
- Measuring and setting targets for citizen satisfaction

Service Transformation Plan (STP)

The STP is a roadmap that details the way forward for service transformation to achieve the GC and ESDC Service Strategy goals. It encompasses the department's response to the EI SQR and provides an incremental, flexible, and targeted plan of action that will allow the department to execute and meet the goals of the EI SQR and Service Strategies. The STP is organized by Epics, or high-level categories that represent client service expectations under which the STP solutions are grouped.

Recommended Reading

For additional background and context, please feel free to review the recommended reading outlined below:

- GC Service Strategy
- ESDC Service Strategy
- EI Service Quality Review
- Service Transformation Plan

Appendix 3: Service Transformation Plan (STP) Solutions

The Plan is broken into five major outcomes (Epics) and supporting aspirational solutions. The Epics, outlined below, have been used as a method to group together solutions that will support the realization of similar capabilities and / or have similar impacts on users and clients. The STP Scrum Playbook details the approach to deliver a STP solution from mobilizing a pod and planning through to execution.

Allow Me

Allow citizens and clients to access their services/ benefits in a faster and efficient manner.

Solutions:
Save My Work
1.1 Save & Retrieve

Easy Access to Me:
1.2 Simplify Channel Registration
1.3 Enhance Authentication
1.4 Risk Based Authentication
1.5 eSignature

Let Others Access for Me
1.6 Enabling Delegates

Trust Me

Enable better ability for clients to apply for benefits/ services faster by leveraging known data about the client. Clients will feel trusted and recognized.

Solutions:
Know Me
2.1 Single Client Profile
2.2 Manage Client Profile
2.3 Document Upload
2.4 Risk Based Entitlement Approval

Do it For Me
2.5 Prefill Client Information
2.6 Leverage Alternative Data Sources for Burden of Proof
2.7 Auto Enroll

Do It Better
2.8 Smart Entitlement & Benefits Approval Tool

Tell Me

Give more information about the benefits and services and have multiple means of efficiently communicating.

Solutions:
Help Me
3.1 Request and Resolution Tracking
3.2 Client Event Notifications
3.3 Call Me Back
3.4 Live Chat
3.5 Chatbot
3.6 Video Chat

Advise Me
3.7 Smart Application
3.8 Benefits & Service Finder

Hear Me, Show Me

Increased ability for clients to provide feedback and answer their questions.

Solutions:
Speak My Language
4.1 Client Centric Feedback

4.2 Client Centric Policy

4.3 Ask Canada
4.4 Program Knowledge Repository

Design with Me
4.5 Human Language Search & Dynamic FAQ
4.6 Redesign Online

My Choice

Provide multiple options to engage with ESDC so clients have their choice in how they want to interact and receive benefits/ services.

Solutions:
Easy Pay
5.1 Alternative means of receiving Benefits

Anywhere, Anytime
5.2 Community Outreach & Liaison Service
5.3 Mobile App
5.4 Next Generation Telephony
5.5 One Account Portal

Appendix 4: Public Affairs and Stakeholder Relations Branch Resources & Tools

Public Affairs and Stakeholder Relations Branch (PASRB) provides strategic communications, marketing and stakeholder relations advice, services and support to all Employment and Social Development Canada's (ESDC) portfolio Ministers, Parliamentary Secretaries and Deputy Ministers. For all questions related to the PASRB products and services, please contact your Communications Account Manager. You may also find more information from the units described below. The following is a list of some additional tools and resources that may be helpful with your planning:

Stakeholder Relations	The Stakeholder Relations team is the centre of expertise for Ministerial and high-profile stakeholder and public engagement activities. They work with Communication Account Managers to provide advice on consultations both online and in-person. Advisors offer step-by-step guidance throughout each phase of the consultation process and they will provide you with the tools and templates needed for developing a successful consultation plan. Contact PASRB for more information.
Public Environment Analysis	This group provides ongoing monitoring and analysis of the public environment. They can produce analyses on trends in stakeholder and media positions, and public opinion research related to specific departmental policies and programs in support of Memoranda to Cabinet, branch communications plans, engagement activities and decision-making on departmental communications initiatives extending to the ministerial level. They also prepare the Weekly Public Environment which provides a complete overview and analysis of positions taken by our department's stakeholders - from a wide variety of public sources – on the full range of ESDC's portfolio of programs and policies. They also maintain "Interest" files which document stakeholder reactions by key mandate areas. Finally, their stakeholder reach lists detail specific stakeholder interests, publications and membership for the key portfolio programs and policies. • If you would like to request a public environment analysis or to access stakeholder intelligence, please contact Daniel Lenko.
Public Opinion Research	This unit provides advice on all departmental public opinion research activities, helps define the scope of work, co-ordinating approvals, advises on procurement, provides project management services and advice on methodology, legislative and policy requirements as well as Government of Canada and industry standards. It also creates POR Data Profiles, which contain the results of publicly available Public Opinion Research on a broad range of topics related to ESDC policies and programs. These can be very useful in client-centric policy design. • Contact Public Opinion Research for more information.
Media Services	Get regular access to the top stories, important articles, and all articles pertaining to our department through the NewsDesk platform. • Contact Media Services for more information.