



# Increasing Access to Benefits for Peoples with Disabilities

Developmental Evaluation  
of the Benefit Screening  
Tool Project Final Report

AUGUST 2023

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Since its establishment in December 1991, SRDC has conducted over 450 projects and studies for various federal and provincial departments, municipalities, as well as other public and non-profit organizations. SRDC has offices located in Ottawa and Vancouver, and satellite offices in Calgary, Hamilton, Montreal, Regina, St. John's, Toronto, and Winnipeg.

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## TABLE OF CONTENTS

<b>INTRODUCTION</b>	<b>1</b>
Project objectives	1
Project implementation	2
Logic model	4
<b>EVALUATION STRATEGY</b>	<b>6</b>
Developmental evaluation approach	6
Evaluation questions	8
Methodology	9
Data sources used for the evaluation	14
Data analysis	19
<b>PROJECT ACHIEVEMENTS AND LESSONS LEARNED BY PHASE</b>	<b>20</b>
Exploration and service design	20
Delivery	23
<b>IMPLICATIONS OF FINDINGS</b>	<b>37</b>
What have we learned?	37
What next steps make sense as a result of the findings?	43
What questions do the findings raise for future exploration?	44
<b>REFERENCES</b>	<b>46</b>
<b>APPENDIX A: ADDITIONAL WEBSITE METRICS</b>	<b>47</b>

## INTRODUCTION

Prosper Canada is a national charity dedicated to improving the financial security of Canadians living on low incomes through policy and program innovation. From July 2020 to July 2023, Prosper Canada carried out the *Benefit Screening Tool for People with Disabilities* project, focused on increasing access to government benefits for people in British Columbia living with disabilities. The three-year project, funded by Employment and Social Development Canada (ESDC), has been implemented in coordination with Disability Alliance BC (DABC), Plan Institute, and the Social Research and Demonstration Corporation (SRDC). Prosper Canada commissioned SRDC in 2020 to design and conduct a developmental evaluation of the project.

## PROJECT OBJECTIVES

The ultimate objective set at the start of the project was to develop an effective *Access to Benefits Service*, with the potential for sustainable scaling, that could support people with disabilities – at no or low cost to them – to access government benefits for which they were eligible but not receiving.

The concepts underlying this objective became more clearly defined as the project developed. The core focus was development of a Benefits Screening Tool, which once developed was named Disability Benefits Compass. This tool was intended as the centerpiece of a new service to people with disabilities, but its successful deployment would rely on the project partners, DABC and Plan Institute, bringing their caseworkers and existing clients as well as new users to the tool and supporting them to use it. Hence, the broader objective became to create an *Access to Benefits Service* of which the tool would be a key part.

To achieve this objective within three years, this project sought to:

1. Document the benefit journeys of people with disabilities and generate and disseminate new insights into the strengths and weaknesses of benefit processes from their perspectives;
2. Identify, document, and share insights on the most effective and promising approaches for removing barriers and increasing access to benefit income for people with disabilities;
3. Co-design, develop, pilot, and evaluate the new *Access to Benefits Service* with and for people with disabilities in BC (leveraging the Benefit Screening Tool called Disability Benefits Compass as the newly-designed centerpiece of this service); and

4. Share resulting project insights and project methodology, tools, and resources with interested stakeholders.

The exact form of the *Access to Benefits Service* to be created was to be developed and refined as a result of decisions made by the project team during the project's exploration, service design, and delivery stages (each further described in this report).

## PROJECT IMPLEMENTATION

The project was carried out in six phases – each with specific activities to support implementation – across three key stages. We describe the stages and planned activities in the first sections of the report and later (from page 22) describe actual project achievements and lessons learned.

### Exploration stage

- **Discover (months 1-6):** In the Discover phase, the project aimed to gather insights on the problem of access to benefits, as well as associated opportunities and stakeholder needs. Activities planned for this phase included conducting web research and a literature scan, interviews with people with disabilities, and surveys of service providers and caregivers.

### Service design stage


- **Define (months 7-9):** The Define phase of Service Design focused on prioritizing the most important information collected in the Discover phase to identify the most urgent problem(s) that could realistically be solved by the project, including defining a clear challenge for the project to address. Intended activities in this phase included interviews and/or focus groups with people with disabilities, caregivers, and providers to capture feedback on draft service models.
- **Develop (months 10-12):** The Develop phase of Service Design focused on expanding the project scope to identify and refine potential *Access to Benefits Service* solutions through iterative activities like brainstorming, prototyping, and testing. The activities anticipated included co-creation sessions with potential project participants and other stakeholders as well as developing journey maps.

## Delivery stage

- **Deliver (months 13-18):** In the Deliver phase of Service Design, the expectation was for project partners to prototype, produce, and launch a final service and *Benefit Screening Tool* to be called Disability Benefits Compass. Activities anticipated for this phase included prototyping, producing, and launching a service and developing training materials to support delivery.
- **Pilot (months 19-36):** Once the service design process had been completed, the enhanced *Access to Benefits Service* (including the Disability Benefits Compass) would be tailored to the unique needs of people with disabilities in BC, while respecting the context in which the service would be provided. Activities anticipated in this phase included training service providers, piloting of the service, monitoring usage and activities, and implementing data collection to inform the evaluation.
- **Reporting and Knowledge Mobilization (months 34-36):** The intention for the Reporting and Knowledge Mobilization phase was to develop a final insights report and a corresponding knowledge mobilization plan to broadly share project results, insights, new project delivery tools and resources with relevant stakeholders. Specific activities were expected include sharing project insights, developing a webinar on findings, disseminating tools and resources.

The overall roles of the project partners in carrying out the project are summarized in Table 1.

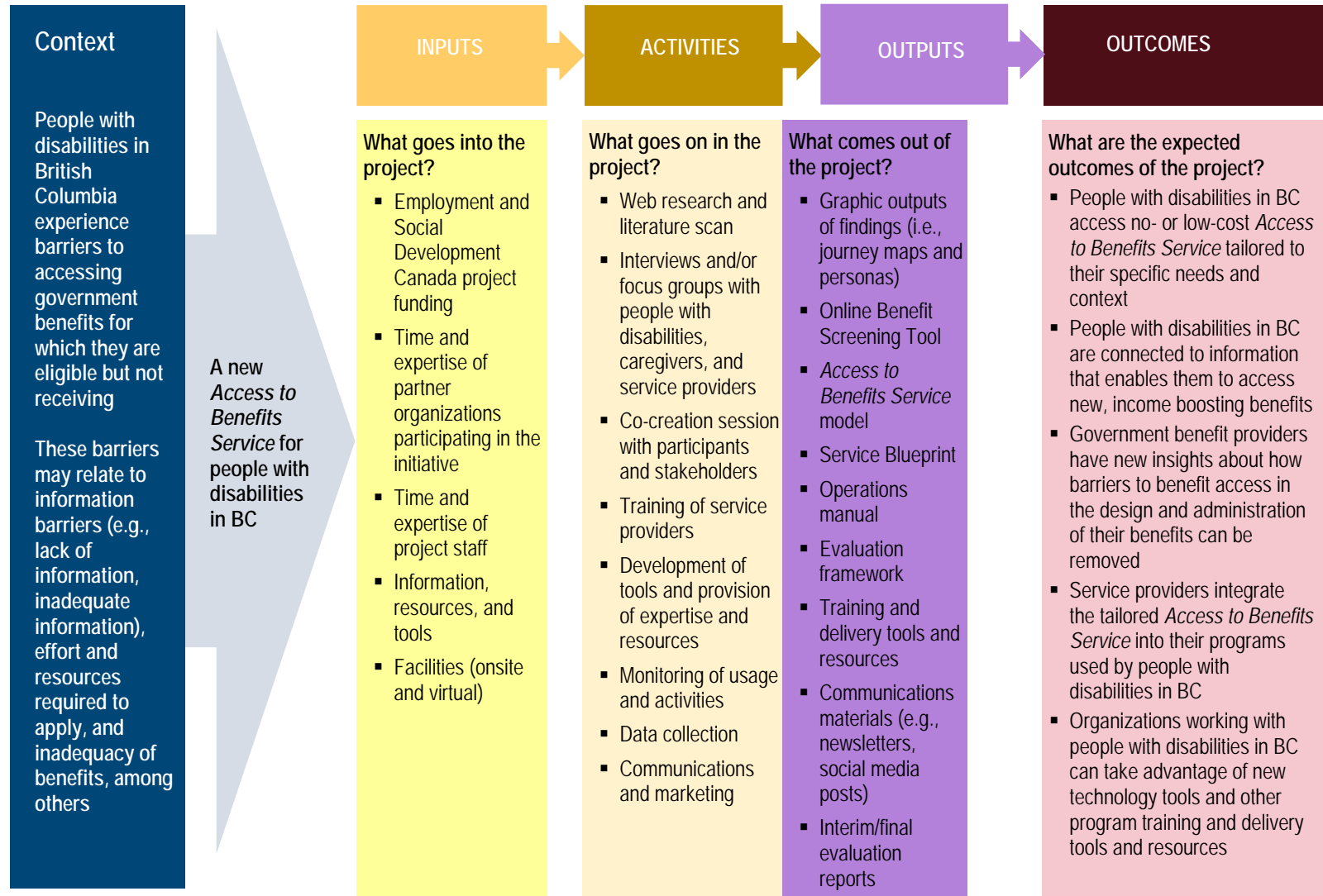
**Table 1 Partner roles in project implementation**

Project partner	Roles
	<ul style="list-style-type: none"> <li>▪ Service design lead</li> <li>▪ Primary project coordination lead</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Primary service delivery partner</li> <li>▪ Support all phases of service design</li> <li>▪ Facilitate active engagement of people with disabilities</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Advisory role throughout the project</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Advisory role during service design</li> <li>▪ Design and implement the evaluation</li> </ul>

## LOGIC MODEL

A logic model is a depiction of the relationship between inputs, activities, and outcomes, reflecting how and why a program or project is expected to work. Based on the initial project discussions in Discovery and Define phases and SRDC’s review of project documents, SRDC developed a logic model in June 2021 for the new *Access to Benefits Service* (see Figure 1). The first column details the context for the project. The inputs column summarizes the resources allocated to the project. Activities are the tasks to be carried out as part of the project, while outputs are the products expected to result from activities. Finally, outcomes are the changes expected to result from the project. The logic model considers the role played by the full range of planned activities and expectations as parts of the *Access to Benefits Service* project.

Figure 1 Logic model for the *Access to Benefits Service*





## EVALUATION STRATEGY

### DEVELOPMENTAL EVALUATION APPROACH

Given the innovative nature of the project, SRDC set out to use a **developmental evaluation** approach (Patton, 2011) that provides continuous feedback and learning to support adjustments throughout the project. Developmental evaluation was appropriate because it is flexible and produces future-oriented feedback focused on learning and continuous improvement. As evaluator, SRDC was involved in the project decision-making process from month to month, providing timely and relevant information to the project through a variety of responsive evaluation activities, helping the team as it conceptualized, designed, and tested the new *Access to Benefits Service*. In order for the project to achieve its intended objectives within the short time period, the intent was for the evaluation to support timely adjustment. In practice, this meant that SRDC conducted its evaluation activities in a flexible manner considering the emerging realities of the project while holding in view the project’s overall objectives. The evaluators worked collaboratively with the project partners to ensure a productive cycle of providing timely answers to mutually agreed key evaluation questions.

Developmental evaluation is appropriate for complex and emergent initiatives such as the *Access to Benefits Service* and Disability Benefits Compass because it respects the innovative intent of such projects rather than offering a prescribed methodology.<sup>1</sup> While SRDC adapted data collection to the changing needs of the project, the basis for SRDC’s approach to carrying out its activities was a set of broad functions and practices associated with developmental evaluation (see Table 2).

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<sup>1</sup> Alternative designs such as summative and impact evaluations become relevant once the model is fully developed and can be implemented optimally, which is unlikely in the first trial of an innovative approach such as this.

**Table 2 Functions and practices of developmental evaluation**

Functions		Practices
Starting points	Frame the issue	<ul style="list-style-type: none"> <li>▪ Conceptualize and articulate the problem/opportunity by helping to frame the issue and its dynamics</li> <li>▪ Identify key players and factors, including stakeholders, resources, and contexts</li> </ul>
	Develop a learning framework	<ul style="list-style-type: none"> <li>▪ Create a learning framework that maps key challenges and opportunities, highlights potential areas for learning, and identifies feedback mechanisms</li> </ul>
Ongoing practices	Orient stakeholders	<ul style="list-style-type: none"> <li>▪ Help identify and test assumptions, extend understanding, articulate and refine the model, and maintain an adaptive orientation</li> </ul>
	Observe key developments, group dynamics, and structures	<ul style="list-style-type: none"> <li>▪ Help identify leverage points, assess efforts, and stay in line with the core intent and principles of the model</li> <li>▪ Identify key developmental moments, group dynamics, structure, action/inaction, and threats/opportunities</li> </ul>
	Analyze and synthesize data to facilitate ongoing learning and integration	<ul style="list-style-type: none"> <li>▪ Make visible the intuitive and tacit learning of project partners by injecting systematic analysis</li> <li>▪ Help identify patterns, integrate new information, and consider the implications of new information, feedback, and/or changing contexts</li> </ul>
	Offer recommendations when appropriate to influence and shape the development process	<ul style="list-style-type: none"> <li>▪ Ask questions to expose assumptions or misunderstandings, push thinking, surface values, highlight common ground, and reveal differences in perspective</li> <li>▪ Facilitate discussion to encourage listening, surface assumptions, clarify, synthesize, ensure a diversity of voices are heard, and learning is supported</li> <li>▪ Provide information, such as sharing support/concerns of stakeholders; connect people, organizations, and/or ideas to share research on best practices; and identify helpful resources</li> <li>▪ Help clarify/correct assumptions and visually map out the political, economic, social, and cultural forces, interconnections, barriers, and leverage points relevant to the initiative</li> <li>▪ Pause the action to clarify/consider/synthesize information</li> <li>▪ Remind partners of the core intent and guiding principles of the initiative and of past successes/failures to inform future actions</li> </ul>

Sources: Adapted from Dozois et al., 2010; Gamble & McConnell, 2008.

## Strengths and limitations

The main limitations of adopting the developmental evaluation approach turned out to be those known and accepted at the project outset.

- Given a relatively modest and fixed overall budget for the three years, the regular presence of evaluators at project development and implementation meetings consumed a sizeable portion of the budget, leaving less for the more traditional evaluation activities of evaluation framework development, data collection, analysis, and reporting.
- The scale of evidence gathering, analysis, and synthesis at each stage of the project was initially hard to predict since the most useful points for intensive evaluation input were to be decided as the project proceeded. As a result, data collection priorities changed over time.
- Another key limitation is that while partners may be interested in the outcomes and impacts of the new Disability Benefits Compass, the agreement to use evaluation resources to pursue a developmental evaluation meant that the project was not subjected to a formal quantitative or summative evaluation.

These shortfalls can be balanced against the strengths of adopting a highly participatory approach. First, all partners had regular opportunities to provide input to, and engage in, decisions about what the evaluation effort would comprise. Second, the outputs of the evaluation at key stages were designed to be utilization-focused: relevant and informative for guiding critical project decisions.

## EVALUATION QUESTIONS

In keeping with the flexible and adaptive nature of developmental evaluation, SRDC crafted evaluation questions to capture relevant data at critical points over the course of the project to support project development while allowing for iterations over time i.e., ongoing practices of “*orienting, watching, sense-making and intervening*” (Dozois et al., 2010). As such, the questions were not fixed, intended only to be answered at the end of the project. Rather, the evaluation questions were intended to be answered at key project stages, to guide each step of the project’s development. As the evaluation provided these answers, in the form of information and feedback, evaluation questions could be removed, added, or revised. SRDC worked with partners throughout the course of the project to develop, adjust and prioritize questions used in its inquiry.

The final roster of questions included the following:

**Discover, Define & Develop** (months 0–12)

- What is the primary focus of the initiative? What issue or opportunity is the group trying to address? How was the issue assessed and defined?
- What can we learn from others? What has already been tried? Why is it important to the issue at hand?
- What are the identified challenges/gaps and opportunities/leverage points? How were they approached and/or addressed? What key practices emerged?

**Deliver (prototype, produce, launch)** (months 13–18)

- What are the key elements of the designed service? How will participants use the service? How and why is it expected to work?
- How is the service being implemented? How are stakeholders involved in prototyping, producing, and launching the service? What tools were developed to support its delivery and how were they used?
- What key practices emerged? What worked particularly well and what could be done differently?

**Pilot** (months 19–36)

- Who were the participants and how did they use the project/service? What was the take-up and satisfaction with the service? What are the users' recommendations for improvement or what else is needed?
- How does the Disability Benefits Compass work? What are its perceived benefits? What changes, if any, can be attributed to the use of the Disability Benefits Compass?
- What are the key lessons learned from the project? What key successful practices emerged? What elements of the project could be scaled up and how?

## METHODOLOGY

Although developmental evaluation is inherently flexible and non-prescriptive at the outset, not planning out all its specific activities against timelines, there is still an overarching methodology based on anticipated project stages and needs. Thus, SRDC designed an evaluation methodology

in months 2–4 based on project documentation available at the time and discussions with project partners. The intent was to provide a cohesive organizing structure for carrying out the evaluation, captured in October 2020 in the evaluation framework (see Table 3).

Data collection embraced a mixed methods approach incorporating both qualitative and quantitative data collection and analysis. Drawing on multiple data sources to document implementation, plus various means for stakeholders to participate, allowed for a more in-depth assessment than using a single method. The framework was based around SRDC generating answers to the evaluation questions at times when they would be most useful while within the scope afforded by the project budget. Data collection took a flexible approach such that as questions were prioritized, revised, or added, project partners could be provided with feedback quickly as needed.

SRDC was not the only partner generating data for evaluation evidence. Rather, as much as possible, the evaluation utilized data gathered through the monitoring systems partners set up as part of the Disability Benefits Compass tool/service. SRDC advised and provided input on what these data collection systems could collect over the course of the development and design of the project.

The evaluation framework in Table 3 was conceptualized as a flexible guide, facilitating the evaluation in responding to new adjustments and developments, while broadly mapping out the stages of evaluation for the project. Because developmental evaluation is responsive to the evolving progress and needs of the project, not all forecast evaluation activities may be implemented, and new ones may be introduced mid-project. An example of how the framework evolved over the course of the project is provided in Table 4, which shows the data sources actually utilized for the evaluation questions concerned with the later, pilot stage of the project.

**Table 3** Original summary of evaluation data collection: evaluation questions, data sources, and outputs

Phase	Evaluation questions that may be asked	Data sources that may be used	Evaluation outputs
<b>Discover, Define &amp; Develop</b> (months 0–12)	<p>What is the primary focus of the initiative? What issue or opportunity is the group trying to address? How was the issue assessed/ defined?</p> <p>What can we learn from others? What has already been tried? Why is it important to the issue at hand?</p> <p>What are the identified challenges/gaps and opportunities/leverage points? How were they approached and/or addressed? What key practices emerged?</p>	<p>Key informant interviews with project partners (up to 2)</p> <p>Observations at cadence meetings</p> <p>Review of project documents</p> <p>Data gathered via the <i>Burning Question</i> technique (up to 2)<sup>2</sup></p>	<p>This evaluation framework</p> <p>Advice and expertise provided</p> <p>Resources shared</p> <p>Reported in Interim Report #1</p>
<b>Delivery (prototype, produce, launch)</b> (months 13–18)	<p>What are the key elements of the designed service? How will participants use the service? How and why is it expected to work?</p> <p>How is the service being implemented? How are stakeholders involved in prototyping, producing, and launching the service? What tools were developed to support its delivery and how were they used?</p> <p>What key practices emerged? What worked particularly well and what could be done differently?</p>	<p>Key informant interviews with project partners (up to 3)</p> <p>Observations at cadence meetings</p> <p>Review of project documents</p> <p>Data gathered via the <i>Burning Question</i> technique (up to 2)</p> <p>Observations from the co-creation session</p> <p>Evaluation form with participants in the co-creation session</p>	<p>Advice and expertise provided</p> <p>Resources shared</p> <p>Feedback on the design of the <i>BST</i> with respect to built-in data collection</p> <p>Reported in Interim Report #2</p>

<sup>2</sup> A *burning question* is defined as the single most important question the staff and/or project partners need to answer to design the program effectively.

Phase	Evaluation questions that may be asked	Data sources that may be used	Evaluation outputs
<p><b>Pilot</b> (months 19–36)</p>	<p>Who were the participants and how did they use the project/service?</p> <p>What was the take-up and satisfaction with the service?</p> <p>What are the users' recommendations for improvement or what else is needed?</p> <p>How does the Tool work? What are its perceived benefits?</p> <p>What changes, if any, can be attributed to the use of the Tool?</p> <p>What are the key lessons learned from the project? What key successful practices emerged? What elements of the project could be scaled up and how?</p>	<p>Key informant interviews with project partners (up to 4)</p> <p>Review of project documents</p> <p>Data gathered via the <i>Burning Question</i> technique (up to 2)</p> <p>Observations of users and staff on the use of the Tool</p> <p>Short exit questionnaires with users after the use of the Tool</p> <p>Brief phone calls and/or interviews with users</p> <p>Tool usage and monitoring data</p>	<p>Advice and expertise provided</p> <p>Resources shared</p> <p>Input into consent forms and protocols</p> <p>Timely feedback on service design and delivery to inform ongoing improvement</p> <p>Reported in final evaluation report</p>

**Table 4 Summary of data collection sources and metrics actually adopted for pilot phase**

Evaluation question	Data sources actually used	Metrics
Who were the participants and how did they use the project/service?	<ul style="list-style-type: none"> <li>▪ Project documents</li> <li>▪ Google analytics</li> <li>▪ Interviews with website users and frontline staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Limited descriptors of pilot participants</li> <li>▪ Location of users; page views; session duration; number of pages per session; time on page</li> <li>▪ Typical use of Tool</li> <li>▪ Self-reports on use of the website</li> </ul>
What was the take-up and satisfaction with the service?	<ul style="list-style-type: none"> <li>▪ Google analytics</li> <li>▪ Built-in data</li> <li>▪ Interviews with website users and frontline staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Completion of each page or unit</li> <li>▪ Page likes; information found</li> <li>▪ Self-reported frequency of use</li> <li>▪ Ease of use; ease of understanding; helpfulness of website; trust</li> <li>▪ Integration of Tool into services</li> <li>▪ User experiences</li> </ul>
What were the users' recommendations for improvement or what else is needed?	<ul style="list-style-type: none"> <li>▪ Built-in data</li> <li>▪ Interviews with website users and frontline staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Page comments</li> <li>▪ Why would/would not recommend the website</li> <li>▪ Recommendations for improvement</li> </ul>
How does the Tool work? What are its perceived benefits?	<ul style="list-style-type: none"> <li>▪ Project documents</li> <li>▪ Interviews with website users and frontline staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Tool design and project logic descriptions</li> <li>▪ Likelihood to recommend the Tool</li> <li>▪ User understanding of project goals</li> <li>▪ Perceived benefits among users, staff, and project partners</li> </ul>
What changes, if any, can be attributed to the use of the Tool?	<ul style="list-style-type: none"> <li>▪ External survey</li> <li>▪ Interviews with website users and frontline staff</li> </ul>	<ul style="list-style-type: none"> <li>▪ Self-attributed changes</li> <li>▪ Perceptions of project-wide benefits to partners</li> </ul>
What are the key lessons learned from the project? What key successful practices emerged? What elements of the project could be scaled up and how?	<ul style="list-style-type: none"> <li>▪ Synthesis of findings from data sources above</li> </ul>	



## DATA SOURCES USED FOR THE EVALUATION

### Observations at cadence meetings

SRDC was an active participant in the monthly project team meetings (from July 6, 2020 through July 10, 2023), generating and analyzing notes and offering input and feedback in discussions.

### Review of project documents

SRDC reviewed document drafts, prototypes, and mock-ups, offering verbal and written feedback to all project documents.

### Two-way meetings

SRDC met with Prosper Canada representatives in two-way meetings to discuss plans for the service and to inform the corresponding evaluation approach for the Disability Benefits Compass.

### Key informant interviews – partners

SRDC conducted key informant interviews with two Prosper team members and two project partners (in April and May 2021) and again following the June 2022 launch of the Disability Benefits Compass (in July 2022) to gather information, such as descriptions of target users of the website and how the Disability Benefits Compass is expected to work. The interviews were 45-90 minutes long and were conducted by Zoom.

### Observations at workshops

SRDC gathered data as an observer at consultations and co-creation workshops (April 1, April 9, and June 7, 2021) with people with disabilities and project staff.

### Built-in data collection

SRDC recommended that data collection be built in directly to the Disability Benefits Compass. It anticipated that building in data collection would:

- Offer the opportunity to collect information about users’ experiences and feedback in an efficient and timely manner just as, or immediately after, users were engaging with the website content; and
- Provide the evaluators and the Prosper team with real-time feedback on website performance so that improvements could be made on an ongoing basis as needed.

Prosper’s Information System team shared the plans for the Disability Benefits Compass and its capacity with SRDC, leading it to recommend the following components for inclusion:

- Metrics such as geographic location of the website user, page views, session duration, number of pages per session, time on each page, and others available as part of Google analytics.
- Completion of each page or unit, such as steps completed in the process of applying for a benefit.
- Page likes, such as thumbs up/down, happy face, etc., to gauge user satisfaction with key pages.
- A page comments option with a character cap of 200.
- A website exit survey (using the HotJar platform) when a user exits the website (but see below).
- An option to signal willingness to provide additional feedback for the evaluation through an exit survey and/or on other areas of the website. The following wording was adopted on the website feedback page:

Social Research and Demonstration Corporation (SRDC), a Canadian non-profit research organization, has been commissioned to evaluate this project.

Please help us improve the Disability Benefits Compass by completing a brief 5-minute survey! Provide your feedback [*linked to the external survey below*].

If you have questions about the evaluation, or to participate in a follow-up call, please contact [benefitfinder@srdc.org](mailto:benefitfinder@srdc.org).

As the service model was finalized, more information became available about how the Disability Benefits Compass could best present survey options and to whom. Ultimately, the Hotjar survey was implemented as a “pop up” that appeared to users as they used the site (not necessarily at exit) while SRDC’s survey link appeared on the feedback page. Also, it became clear these built in survey tools would only capture experiences from a subset of users. The project team was able to

recommend additional modes of data collection for the remaining evaluation questions, to supplement the built-in data collection for a deeper understanding of website use and experiences.

### *External SRDC survey*

While the goal of the Hotjar survey was to capture user’s immediate feedback about the Disability Benefits Compass as they finished up each visit to the website, while it was fresh in their minds, SRDC developed and programmed its external survey to capture users’ longer-term views and impressions. This was intended to facilitate ongoing improvements. SRDC’s survey link appeared on the feedback page of the Disability Benefits Compass site. The survey was maintained for 12 months (from June 2022 to June 2023) on an external survey platform, Voxco, which stored all data securely on Canadian servers. These questions were included as part of the survey:

- What brings you to the Disability Benefits Wayfinder site? Select the option that best describes who you are.
- Did you find the information you were looking for today?
- Tell us more about what information you were looking for.
- How easy is it to use the website? Select a number from 1 to 10 by sliding the blue dot on the scale, where 1 means not at all and 10 means very easy.
- How easy is it to understand the information on the website? Select a number from 1 to 10 by sliding the blue dot on the scale, where 1 means not at all and 10 means very easy.
- Would you recommend this website to a friend?
- [If no: Why would you not recommend the website?]
- How helpful is this website you to? Select a number from 1 to 10 by sliding the blue dot on the scale, where 1 means not at all and 10 means very helpful.
- Please tell us how this site could be improved.

However, because only five individuals completed the external survey, results could not be used to inform the project or evaluation.

### *Built in Hotjar survey*

Questions as part of the built in Hotjar survey were both closed ended and open ended, to capture users' feedback.

- Pick your province or territory (list of provinces and territories provided)
- What brings you to this site? Select the option that best describes who you are (I am a person with a disability looking for information about benefits, I am a family member/advocate for a person with a disability, I am a staff member at a community-based organization supporting people with disabilities, Other (specify – open-ended))
- Did you find the information you were looking for today? (yes/no)
- Tell us more about what information you are looking for (open-ended)
- How easy is it to use the website? (out of 10)
- How easy is it to understand the information on the website? (out of 10)
- Would you recommend this website to a friend? (yes, no); if no or no response, why would you not recommend the website? (open-ended)
- Do you need assistance from an advocate? (yes, no)
- How helpful is this website you to? (out of 10)
- Please tell us how we can improve this site (open-ended)

Survey results from 113 respondents are included in the next section of the report.

### *Web analytics*

Using Google analytics, website metrics for the Benefit Compass tool were collected over a 12-month period, from June 4, 2022 to May 30, 2023. Metrics captured include the number of visitors/users, link click source, benefit pages accessed, as well as key site page views and outbound clicks.

## Interviews with website users and frontline staff

Other data collection comprised qualitative interviews with website users and DABC frontline staff to provide more nuance to the posed evaluation questions. These interviews were scheduled initially in January 2023 – about eight months into the pilot. Four months later, in May and June SRDC undertook follow up interviews with the same users and sought out new website users: people with less experience using the site than the first batch of users interviewed. Specifically, SRDC sought to conduct:

- *Interviews with website users* to gain more detailed insights on user experiences than were possible in previously collected quantitative data, including perceived benefits of the website, any changes attributed to website use, and suggestions for improvement. These users were recruited by project partners: DABC and Plan Institute. SRDC undertook five interviews, averaging about 30 minutes in length each. All interview participants were between the ages of 40 and 60, living in urban and suburban areas of BC.
- *Follow up interviews with the same five website users*, 2 to 3 months after the initial interviews to learn whether their situations had changed, whether the website had remained useful to them over time. These interviewees were also asked about the outcomes of any benefit applications they had implemented that had been supported through use of the website or *Access to Benefits Service*. Of the five interviewees, four were accessing the website for themselves, and one was a parent/caregiver accessing the website on behalf of an adult child. As a note, because these interviewees were those who had continually accessed the website on more than one occasion, they may have a positivity bias towards the tool.
- *Interviews with DABC frontline service staff* at roughly the same time as the first round of user interviews. These interviews were intended to gather observations about client website use and views on the integration of the Disability Benefits Compass into the program model and/or existing services. The interviews were conducted via Zoom, utilizing Zoom’s built-in transcription function. We conducted two interviews in total (one client facing organization and one non-client facing organization) averaging about 45 minutes in length.
- *Interviews with new website users*. The approach used to reach out to users to interview initially (as described above) meant that volunteers for interviews were people who were known users of the site, often repeat users. Recognizing that their views may not represent those of everyone encountering the website, project partners felt illuminating perspectives could also be gathered from people encountering the website for the first time. Thus, at the time of the follow-up interviews, SRDC also asked DABC and Plan to locate a small number of people newly using the website for interview. Two interviews were conducted by telephone, ranging from approximately 30 to 50 minutes each. One respondent was a parent/caregiver accessing the website for himself while the other was accessing on behalf of an adult child.

## DATA ANALYSIS

Data collected throughout the initiative were analyzed on an ongoing basis to inform the project. To make sense of the data, researchers cycled through a series of guiding questions, with a particular focus on the following:

- **Emerging patterns and any divergence from patterns**
  - What patterns or themes emerged? Are there any deviations from these patterns?
- **Turning points, challenges, and learnings**
  - Are different data collection methods showing similar or different results? Why might that be? Are there alternative explanations for the results? What are the possible limitations of the data?
- **Insights for the project model**
  - Do the results make sense? What do the results tell us about our model? How could (or should) the model be modified?
- **Implications of findings**
  - Are there any findings that are surprising? What should the project team do (if anything) in response to these findings? Do the results lead to additional questions that should be explored?

While developmental evaluation can draw on methods and analytical techniques from across the evaluation toolkit, some specific types of analysis dominated.

- **Qualitative data** (interviews and website derived data) were reviewed and analyzed to draw out common themes (i.e., topics, ideas, and patterns of meaning) across participants' responses, as well as relevant specificities shared by respondents regarding their experiences.
- Stata software was used to clean and analyze the **quantitative data** collected through the Hotjar survey. A total of 113 respondents were included in the analysis, consisting of individuals who indicated they were from British Columbia and answered at least one other survey question (respondents from other provinces and territories (n=181) or who did not answer any additional questions (n=12) were excluded from the analysis). The number of respondents to any one question ranged from 28 to 113. The “n” values reported below for each question reflect the actual number of respondents. Frequencies (i.e., the percentage of respondents selecting each response option for each question) are reported for closed-ended questions. The range and median of responses are reported for rating-style questions.

## PROJECT ACHIEVEMENTS AND LESSONS LEARNED BY PHASE

Earlier, we set out the evaluation phases as planned. We report here on what was actually achieved and learned from each phase.

### EXPLORATION AND SERVICE DESIGN

#### Exploration: Discover (months 1-6)

In the Discover phase, the project gathered insights on the problem of access to benefits, as well as associated opportunities and stakeholder needs.

Evaluation insights were shared by providing written and verbal feedback to specific questions and feedback requests (feedback discovery report, prototypes and features mock-ups, and options for define phase), as well as by developing brief written syntheses of evaluation data. In addition, SRDC engaged in two-way feedback discussions at meetings with Prosper Canada (January 29 and May 19, 2021). These discussions served as check points for the developmental evaluation, allowing partners to discuss roles and needs, and assisted in identifying new questions to be answered by the evaluation.

#### Service design: Define (months 7-9)

The Define phase of Service Design focused on prioritizing the most important information collected in the Discover phase to identify the most urgent problem(s) that could realistically be solved by the project, including defining a clear challenge the project would address.

#### Service design: Develop (months 10-12)

The Develop phase of Service Design was about expanding the project scope to identify and refine multiple potential *Access to Benefits Service* solutions through iterative activities like brainstorming, prototyping, and testing. Other activities included a co-creation session with research participants and other stakeholders and developing journey maps.

## What was learned through Exploration and Service Design?

At the end of the Discover, Define & Develop phases, SRDC prepared a written summary of the findings to date drawing heavily on data from the key informant interviews and observations. This document focused on providing insights to the evaluation questions to be answered in this phase of work and included: key insights gained for informing the design of the Disability Benefits Compass, a summary of challenges encountered and how they were approached, and recommendations for next steps. These key insights gathered by the evaluation in this phase are summarized below.

### *How was the project unfolding to this point? What are your thoughts on process?*

At this stage, the project had unfolded well and as expected. Structures had been built and were in place to allow for discussions that helped move the work along. Project partners perceived the project to be a positive collaborative experience, with opportunities for new questions to emerge and be answered. Key informants commented that their feedback was received with openness by the Prosper team and incorporated well. Acknowledging that several key questions remained unresolved and that at that stage the scope of the tool had yet to be finalized, the key informants viewed the project as being on track.

### *What key insights were gained and how should they inform the design of the tool?*

Overall, there was clarity on the lessons learned through the project to the end of the Develop phase. However, there was less clarity on what the lessons learned meant for the design of the Disability Benefits Compass. The insights expressed tended to be general in nature, with less specificity on how they could inform design. Insights included:

- Recognition that there was a need to prioritize and scope the project that may be at odds with partner organizational mandates to be inclusive and serve everyone. At the same time, there was recognition that the new tool could not do everything. As one interviewee suggested: *“We have to make a decision to prioritize, articulate, make a decision, and sit with it.”*
- Although the *“what and how”* of the tool was still coming into focus (as articulated above) at the end of the Develop phase, there was recognition that merely providing information to users was not enough and that the Disability Benefits Compass should also help people apply what they learned to apply for and obtain benefits.
- Given the fragmented nature of disability services in British Columbia, there was a desire for the website to serve as a centralized navigation tool, even while recognizing that it could not solve system-wide issues.



- There was agreement that the Disability Benefits Compass could only serve those who had access to the internet and were comfortable with self-directed information (i.e., ultimately it was not going to play a central role for people who need a lot of support).
- There was a desire to build on, link to, and integrate with existing tools in this area to further support ways to bridge services and supports. This included a desire to learn from Prosper Canada's experience with development of other tools such as the Benefits Wayfinder, incorporating any best practices (e.g., is this experience documented? who uses these tools and how? etc.).

### *What challenges were encountered and how they were approached?*

Most of the identified challenges mentioned by the key informants were questions related to project scope and were brought forward to be discussed as a group and resolved through consultations. These included issues such as the potential that the tool would increase demand for partner services (e.g., the help function of the tool). There was a common view that dealing with client expectations around accessing in person support and about what the tool can and cannot do would be a priority area the project must focus on addressing moving forward.

There was some confusion about whether and how external organizations might be involved in the project. While there was agreement that the Access to Benefits pilot was limited to DABC and Plan Institute, there was some desire to have other organizations review and provide input on the information contained in the tool. Part of this desire related to a lack of clarity on what information would be in scope for the website (e.g., on housing or other benefits).

While the co-creation workshops were perceived to be well organized and allowed space for feedback and questions to emerge, some missed opportunities were also identified. In particular, there was a suggestion that workshops missed an opportunity to get answers on the “*meat and potatoes*” (i.e., the structure) of the tool and focused instead on specifics of design. There was a recognition that a balance must be struck between allowing people space to have their voices heard and steering feedback by giving clear choices for options for the main criteria by which to determine structure and scope.

### *What else would be needed before the tool could move to the Deliver phase? What were the recommendations for next steps?*

Perspectives shared to inform the upcoming Deliver phase included the following:

- There was a need not to let striving to solve lots of problems hold up solving any, to reassert the primary focus of the tool, i.e., “*Do less and do it well.*”

- Stakeholders recommended the use of mock-ups with key questions (by providing options) as a consultation mechanism to nail down components and to consider the trickle down of various decisions.
- It would be important to set up and manage expectations about what the tool could do, so people understood the limitations of what the tool would provide, i.e., “*Embed expectations with humanity.*”
- It would also be important to make decisions on with whom the website will be piloted by considering the make-up of existing DABC networks (e.g., embracing the possibility that most are already on PWD and DTC) and to consider carefully how the Disability Benefits Compass will be distributed.
- More could be learned from lessons shared from Prosper Canada’s work in other provinces. In particular, it would be helpful to learn best practices, how decisions were made and why, etc., to inform the present work.

### *What will the successful outcome of this project look like?*

Stakeholders envisioned project success as follows:

- Stakeholders hoped the Disability Benefits Compass would lead to more people receiving provincial and federal benefits with greater ease and that the website itself would facilitate the acquisition of these benefits. The Compass will not solve all the need that is out there, but it should allow people to maximize their take up of what is in existence.
- The project should inform policy and advocacy work by helping to identify issues and barriers that are still unresolved. It would thus help all organizations, Prosper Canada, DABC and Plan Institute, advance their broader mandates over the longer term.
- The project will result in stronger connections between the agencies.

## DELIVERY

### Deliver (months 13-18)

In the Deliver phase, project partners prototyped, produced, and launched a final service and the Disability Benefits Compass website. Training materials were also developed to support delivery.

## Pilot (months 19-36)

The service (including the Disability Benefit Compass) was intended to meet benefit information and application needs of people with disabilities in BC, while respecting the context in which the service would be provided. The pilot would help determine the extent to which this intention was met. Activities in this phase included training service providers, piloting the service, monitoring usage and activities, and implementing data collection processes to inform the evaluation.

### *Disability Benefits Compass (Benefit Screening Tool) usage during the pilot*

#### **What do we know about the participants and how they used the website?**

According to website metrics, over the 12-month period considered by the evaluation – from June 4, 2022 to May 30, 2023 – there were 5,245 visitors to the website from British Columbia.<sup>3</sup>

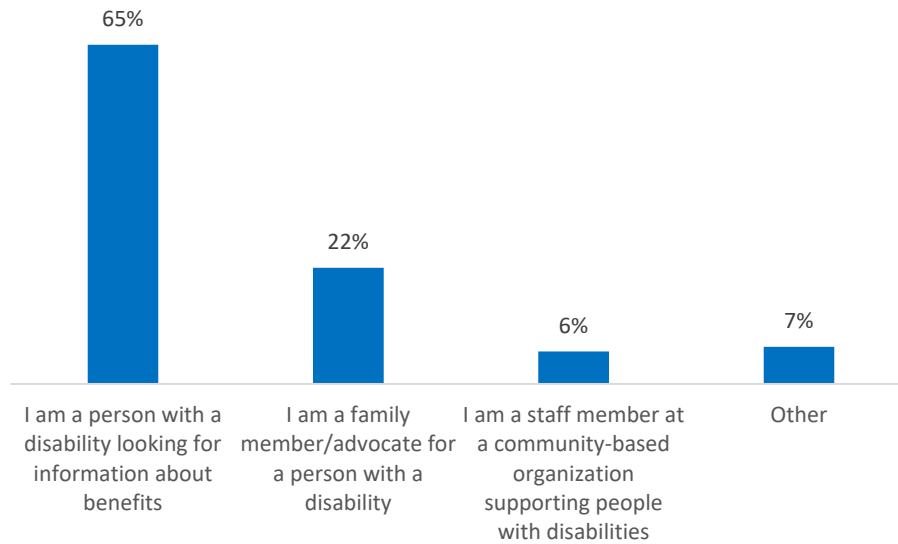
- Website users were most commonly geographically located in Vancouver (31 per cent).
- Just over one quarter (27 per cent combined) were from six other BC cities: Surrey (nine per cent), Victoria (five per cent), Burnaby (four per cent), Kelowna (four per cent), Nanaimo (three per cent), and Coquitlam (two per cent).
- The remaining 42 per cent were spread across 85 other BC locations, including Dawson Creek, Golden, Hope, Nelson, Prince Rupert, Revelstoke, and Richmond, among others.

When asked via the Hotjar survey what brought them to the website, the majority of respondents (65 per cent) indicated they were a person with a disability looking for information about benefits. Nearly one quarter (22 per cent) said they were a family member/advocate for a person with a disability while six per cent said they were a staff member at a community-based organization supporting people with disabilities (see Figure 2). Seven per cent provided other responses, noting, for example, that they were a “*Financial Advisor dealing with people with Disabilities,*” were looking for specific types of information (e.g., about applying for DTC, what disability forms to fill out, “*education funds to upgrade skills for almost 65,*”), or shared details about their specific situations.

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<sup>3</sup> A total of 5,194 users (99 per cent of all BC users) were identified as new users. However, it is possible that some users identified as new could actually be returning users who had used a different computer/IP address/browser, used incognito mode, or deleted the website's cookies. It is also worth noting that immediately following the evaluated period — from June 4, 2022 to July 19, 2023 — there were 8,128 visitors to the website in BC. The increase in rate of use may be attributed to new promotion by Prosper Canada via Facebook. However, some users during this period may have been looking for information on Bill C-22, which was passed in June 2023.

Figure 2 What brings you to this site? Select the option that best describes who you are (n=113)



Reflecting survey results, most users interviewed said they visited the website for the first time – typically after hearing about it through the Plan Institute website or email or a DABC referral – to find general information on benefits available and how to apply. A few were looking for specific information, for example, on supports for home improvement/adaptations, retirement savings options, and lapsed benefits. All had navigated the website on their own without the assistance of an advocate.

According to website metrics, the most common link click sources (i.e., the previous pages from which users clicked to access the Benefits Compass tool) were the “DABC website” and “Direct to website/Google” (38 per cent and 36 per cent, respectively). No more than three per cent came from any other single click source.

Further details are provided in *Appendix A: Additional Website Metrics*.

After the initial visit, all but one user interviewed returned to the tool once or a few times monthly to find updated or other relevant information they needed. Specific information sought on repeat visits was related, for example, to the process for cashing out RDSP, applying for the DTC, and the new Disability Benefit C-22). Most users interviewed had also shared the website with others, such as friends and family who were also looking into services and benefits, or walked them through it, in effect becoming advocates themselves.

*"I still find myself going back every month and seeing if there's any new information out there. So even for a person like me who's kind of use to the services and has the services from the government, I still go back for a refresher and for more information." – User interviewee*

*"One person said, 'I'm so glad I learned about this tool, I'm sharing it with other people that I'm working with.'" – Case manager interviewee*

### **How did case managers use the tool?**

Echoing user perspectives, case managers interviewed identified the main website users as those who had emailed to inquire about disability benefits available to them, were on waitlists for a particular disability benefit, along with parents and caregivers using the website to look for supports for those in their care.

Case managers had typically shared the link with clients via email or telephone. Advocates were being encouraged and reminded to use the website in their client calls and in some cases helped clients navigate through it. While in the past they found it necessary to provide clients with multiple online links, case managers indicated they could now say, *"Go through this tool and see what fits your situation best."* Those on the waitlist also had the option of checking out the website on their own. Additionally, one case manager noted that many advocates over the years had requested information sessions on the benefits available in each province but now because of the tool no longer need to do so and could focus on other training priorities instead. Case managers were also aware of professionals/advocates using the website for their own learning and education (i.e., to gain knowledge on specific benefits available to clients and as a reference in general).

### **What was the take-up and satisfaction with the service?**

According to website metrics, in the 12-month period from June 4, 2022 to May 30, 2023, the Persons with Disabilities Designation page was the most frequently accessed landing page with 1,731 visitors (52 per cent). Between 366 and 613 visitors access the other three landing pages. See Table 5 for further details.

**Table 5** Number and percentage of visitors who accessed specific disability benefit landing pages (Jun 4/22 – May 30/23)

Benefit landing page	#	%
Persons with Disabilities Designation	1,731	52%
Canada Pension Plan (CPP) Disability Benefit	613	19%
Disability Tax Credit (DTC)	606	18%
Registered Disability Savings Plan (RDSP)	366	11%

Tables 6 and 7, respectively, provide more specific details on key site page views and outbound clicks from the tool.

**Table 6** Key site page views

Key site pages – examples (not exhaustive list)	Number of page views
Welcome to DBW/DBC	7,093
Persons with Disabilities designation	1,740
PWD – Apply Step 1	810
PWD – Apply Step 2	567
PWD – Apply Step 3	353
PWD – Apply Step 4	174
PWD – Apply Step 5	185
PWD – Apply Step 6	183
PWD – Apply Step 7	116
PWD – Apply Step 8	102
PWD – Apply Step 9	82
All others	11,141
<b>Total</b>	<b>22,546</b>

**Table 7**      **Outbound clicks**

Key site pages – examples (not exhaustive list)	Number of page views
Impact on daily living activities	404
I need help with my application – various	389
How to find a doctor or nurse practitioner	338
Resources – all other pages	317
How to use the Disability Benefits Compass	297
Definitions of Arthritis and Depression	216
DABC – Sample letter for your doctor	214
How do I set up My SelfServe account	200
After you apply approved or denied	183
How you can help your doctor complete the DTC medical form	137
There are 3 ways to file income taxes	55
Glossary	47

Survey respondents’ ratings of the website were moderately high with averages ranging from approximately 6.5 to 7 out of 10 in terms of ease of use, ease of understanding the information, and overall helpfulness (see Table 8).

**Table 8**      **Website ratings (out of 10)**

Question	n	Range	Mean
How easy is it to use the website?	40	1 to 10	6.98
How easy is it to understand the information on the website?	38	2 to 10	6.74
How helpful is this website to you?	28	0 to 10	6.54

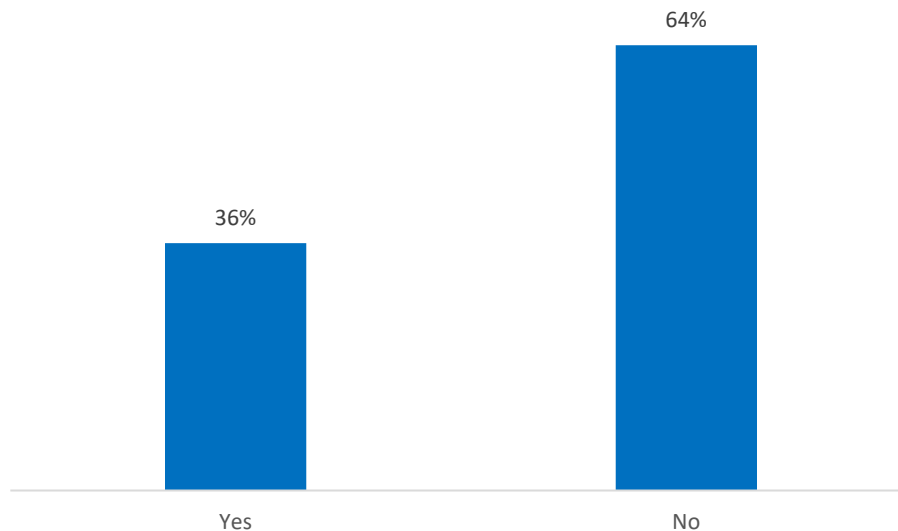
Open-ended survey responses supported these results with some users finding the tool/website to be user-friendly and easy to understand while others found the information at times complex.

All users interviewed, however, said the tool was well-organized and clearly laid out, noting that they did not experience any problems using it. Repeat users interviewed added that the more familiar they became with the website, the easier it became to navigate to the information they were seeking on subsequent visits.

*“My past experiences using the website were really positive. My more recent visits were equal in comparison and each time that I accessed the website it became easier to navigate and find information as I became more familiar with the website each time that I used it.” – User interviewee*

Just over one third of survey respondents (36 per cent) indicated they found the information they were looking for on the website (see Figure 3).

**Figure 3** Did you find the information you were looking for today? (n=56)



Survey participants who indicated that they had *not* found the information they were looking for were subsequently asked via an open-ended question about what information they were seeking. They listed information on additional benefits outside the four main benefits the website highlights, how to find reliable advocates and caregivers, funding for equipment that is required for disability accommodations, public transportation subsidies, and support for first time home buyers.



## How does the Tool work? What are its perceived benefits?

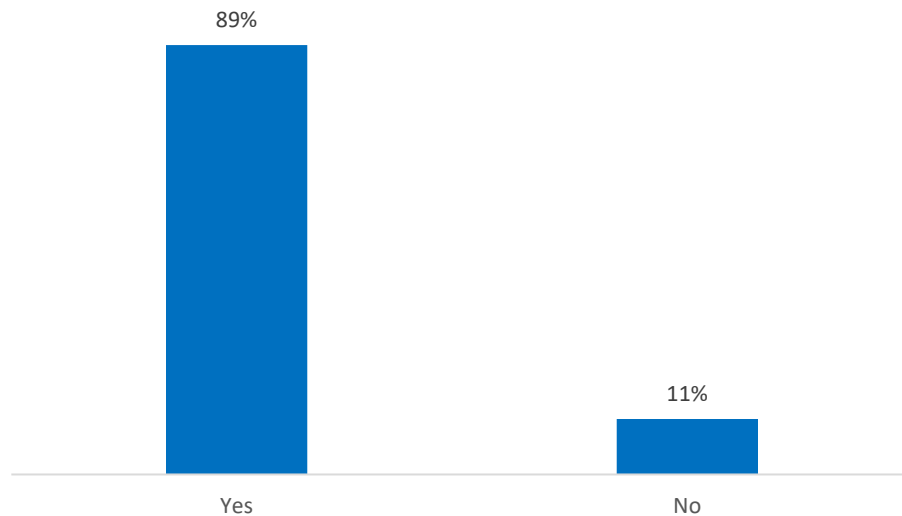
Users interviewed identified the following as the most helpful features of the tool:

- User-friendly navigation, allowing users to move back and forth easily between required pieces information;
- Easy to understand, plain language contents (reportedly in contrast to much other government benefit information, including websites and letters, that is often difficult to understand);
- Inclusion of specific of information, such as:
  - Steps needed to apply (i.e., social assistance, doctor);
  - Tips on how to fill out forms, including steps to take and what language to use (i.e., impact on daily living activities);
  - How to set-up a self-serve account;
  - Explanation of the Disability Tax Credit;
  - Glossary of terms; and
- Links to other resources to help with application processes.

Similar to user interviewees, case manager interviewees found the most helpful website features to be the overall user-friendly navigation and clear, cohesive organization of information. They also found the website visually appealing.

Overall, the majority of survey respondents (89 per cent) said they would recommend the website to a friend (see Figure 4). Among the 11 per cent who would not, reasons included that the information provided was not specific enough to the BC context and that they were not yet familiar enough with the website to share it with others.

Figure 4 Would you recommend this website to a friend? (n=35)



However, perspectives varied regarding whether an advocate is needed to support use of the tool. Three quarters of survey respondents (74 per cent) indicated they needed assistance from an advocate, although the question was not worded to ask about the need for an advocate specifically for using the website. As mentioned, all users interviewed had used the website on their own. One user interviewed expressed appreciation for the ability to access the website independently from home.

*“The website provided every step that you need to do and even questions and tips on what you might encounter...And I was able to look it up myself instead of making an appointment and going down to DABC. So I was able to get that just from being at home, because sometimes people with disabilities they can’t always get out or it’s hard for them to get to places, but I was able to get all that information from the website.” – User interviewee*

However, one new user interviewed who had received assistance from a staff member to fill out forms prior to accessing the website solo said that although the website was informative and well laid out, he would have been very lost if he had downloaded and tried to complete the forms himself. He also felt the tool mainly served the purpose of reinforcing the information DABC and Plan Institute had already provided.

As well, case managers interviewed noted that when a person gets to the point of coming to an organization for one-on-one help, it may be too late for a website tool. Rather, they felt that people looking to get a general understanding of what benefits are available and for what benefits they might qualify stood to benefit most from the tool.

## What changes, if any, can be attributed to the use of the Tool?

All repeat users interviewed felt the website had made a positive difference in their lives, noting the website to be a “*game changer*” that helped them understand how to qualify for benefits and provided an accessible way to access information for people experiencing mobility or mental health issues. Three of these interviewees indicated the website helped with the success of their benefit applications in terms of helping them to identify the benefits for which they were eligible and the process/steps for applying and/or allowing them to apply despite social anxiety and mobility issues. The remaining two repeat users also felt the tool had supported their applications but were still waiting to hear the outcome.

*“[Government] website was not very use friendly at all. It’s more government lingo. It was after I went to the [Compass] website that I was able to understand what the DTC is, what are grants and bonds, and how I can qualify. So for me, it was huge, kind of a game changer.” – User interviewee*

*“The website helped me be successful in my application. I have previously worked with Disability Alliance where I had gone in person down to their office. Part of my disability is I have social anxiety and mobility issues, so it was a challenge to even go down there. But the website provided me all that same information, plus more, because I didn’t have to leave the house, so it included everything that Disability Alliance did and the extra benefit of not having to leave my home.” – User interviewee*

Neither of the two new user interviewees experienced changes they could attribute to the tool or felt the tool had made an impact on their lives.

## What improvements did users recommend?

Survey respondents and users interviewed provided a variety of suggestions for how to improve the tool, including the addition of the following:

- Videos and/or other visuals to supplement the website information for visual learners – could include reorganizing the website landing page so the animations lower on the page are the first thing users see (participants also felt this change would help to make the tool more accessible overall);
- Examples of wording/key word suggestions and types of examples to include in application forms – for example, one participant spoke in great detail about the difficulty of describing the impact of a disability, as required when applying for benefits, voicing a desire for even more examples of this nature;

*“That’s really the hardest part, is being able to describe in infinitesimal detail the troubles that occur, because to me it’s just another day. That’s the hardest part is trying to explain to anyone, what actually goes on.... I’d like to see more examples. There’s a couple of places where there was keyword, suggestion. The pieces become so part of every day, you don’t think to mention it.” – User interviewee*

- More information on resources for finding a doctor or providing this information more up front;
- Tool translation into other languages (e.g., Punjabi, Cantonese, French) – important for the website to be truly equitable (if a translation of the entire website is not possible, at a minimum, translating the glossary was suggested); and
- An application-based option where users can fill out and save information for their applications and receive alerts about changes or new information.

Further, in their second interviews, multiple repeat user interviewees suggested that information on the new Bill C-22 (passed after the interviews took place) be added to the website, with one of the two noting that the Bill affects the benefits currently featured on the tool.

*“The website does an excellent job of providing all the necessary information to apply for disability benefits and the types of benefits that are available in an organized and not overwhelming manner. I don’t think there is much room for any improvements to the website. My only suggestion is to maybe include a link on the website that connects you to updated news or information on the new universal disability benefit that is in the Senate right now and will be coming out in the future. I think it will be important to have an entire section on this on the website once it passes through the Senate because it has to do with the other four disability benefits currently offered on the website.” – User interviewee*

Multiple users also asked for more information on how to renew various benefits (i.e., DTC and RDSP) be added to the tool, noting that there is not a lot of clear information available on the required steps.

Case manager interviewees also shared their ideas about how the tool could better meet client needs as follows:

- Add a statement to the tool indicating, *“These are not the only benefits you may be eligible for”* – i.e., a blanket statement that encourages users to link to other supports without getting into specifics, as a means to fill in website users’ gaps in knowledge about other benefits, beyond the *“Four Main Benefits”* for which they may be eligible;

- Offer a way to save or print information as a PDF and/or other formats, along with a way to email the information easily and directly (not just a link) to others; and
- Make the support organization contact information (phone numbers and email addresses) as easy as possible for users to find.

### Comparison to Benefits Wayfinder

Reflecting on other resources available, all users interviewed said they had accessed the Benefits Wayfinder tool. Similar feedback was given on the Wayfinder tool as the Compass tool, with participants asking for more visuals, including videos and animations, as well as to make the navigation window on the left had side of the screen similar to that of the Compass tool. Most users interviewed thought that it may be more helpful to have the Wayfinder and Compass tools integrated, although one felt that combining the two would be too overwhelming and too much information for users.

### What else is needed to support people with disabilities to access benefits?

Both survey respondents and users interviewed reflected on the challenges and barriers they had faced and were continuing to face in accessing and navigating the benefits system as a whole. Some users interviewed had experience applying for benefits prior to the new website/tool, including with the support of an organization or through their doctor. Others had previously visited government websites to look into benefits but found it difficult to understand the information provided. One user interviewee lamented how the language on government websites is incredibly difficult to understand added that a third-party website like the Disability Benefit Compass is essential for deciphering what applying for benefits entails.

Other specific challenges noted by both survey respondents and interviewees with navigating the system as a whole included:

- Uncertainty about what benefits are available or for which they might be eligible, due to a lack of communication and clarity from or by government resources;
- Complicated application processes (or uncertainty about where or how to apply) with steps that are difficult to navigate;
- Complicated eligibility requirements; and
- Long wait times for application outcomes.

One interviewee described the benefits systems as a whole as *“really humbling. It’s hard. I’d have to say it’s a really hard process to go through.”* She further described how for years she went

without a disability benefit income top-up for which she was eligible, as she did not know it existed or that she qualified for it. It was only through speaking with an advocate that she was made aware of the additional funds available. She questioned why the top-up was not automatic for individuals whose income is below a particular threshold.

Another interviewee highlighted how difficult it is to pinpoint the exact percentage a disability affects one's daily life, which is information is required for various benefit applications.

*"I wish it was more straightforward...[maybe you could] write down what your disability is, how you think it's affecting you, and then perhaps maybe get a response saying, 'You know, we think you might have a case. Go see your doctor and get your stuff filled out.' ...Do you have a learning disability? Yes or no?...instead of asking how you think it's affecting you. It [asks] does this affect you 90 per cent of the time, which obviously for most people I don't think it would." – User interviewee*

Multiple users consulted, including both interviewees and survey respondents, also discussed how the benefits system overall seems set up in a way to discourage people from applying for benefits, due to the complexity of processes and eligibility requirements that often do not align with people's lived realities.

*"We have a bureaucracy that requires a tax credit application; a provincial application; and a federal application – for assistance. The applications are so complex and disheartening. I've myself [begun to] believe this is deliberate so as to prevent disabled [people] from receiving support." – Survey respondent*

Parent advocate interviewees also expressed their frustration with the benefits system and the systemic barriers they have faced in trying to access supports on behalf of their adult children.

*"There needs to be a better way set up so that people in a caregiving situation have better inputs with the people providing the services. Don't shut us out. Use us as a valuable tool." – User interviewee*

Overall, the complexity and uncertainty of the system has led to health and material consequences for many (i.e., perpetual states of worry and stress, less income, and living below the poverty line) that have had a deep impact on their quality of life.

*"I need help filling out disability forms. I have been bounced back and forth with doctors since 2010. Two doctors [gave diagnoses of] chronic pain but no one will fill in the paperwork. I am now waiting for a hematologist appointment. Been 6 months. I do not know what to do. My anxiety and pain is overwhelming." – Survey respondent*

Suggested improvements to the benefits system as a whole included:

- Make the benefit application process more straightforward overall;
- Add information on Bill C-22;
- Provide more resources for mental health support; and
- Better promote the RDSP specifically (one interviewee felt the RDSP was under-used because few people know it exists).

## IMPLICATIONS OF FINDINGS

### WHAT HAVE WE LEARNED?

#### Answers to the evaluation questions

##### *Discover, Define & Develop*

- ***What was the primary focus of the initiative? What issue or opportunity was the group trying to address? How was the issue assessed and defined?***

Overall, all project partners shared a common perspective on the focus of the initiative: *increasing access to benefits for people disabilities in B.C. that they were eligible for but not receiving*. This aligned with the written objective of the project. At the same time, when discussing the online tool specifically, there was a lack of consensus in several areas including: exactly which people the tool should serve, what the tool would do and which benefits would be included. One example of ambiguity was between *using* the tool and *being served* by the tool. People with disabilities should ultimately benefit, but not all could or would be primary users of the tool. For some then, there could be competition between the different information needs of advocates and advisors relative to people with disabilities themselves.

Similarly, there was initially less consensus on the type of barriers to be tackled. Would the service prioritize tackling barriers encountered in the process of applying for benefits (lack of physician, internet access) or disability-specific barriers (accessibility, cognition or literacy) or structural barriers (poverty, lack of trust in government or others grounded in past experiences). Ultimately, the project was able to address all three types of anticipated barriers through different aspects of tool design, to some degree.

There was also uncertainty whether the tool should support those potential beneficiaries who had the most need or the greatest number of people. Again, both objectives were met to some degree, by designing an *online* tool (universally accessible provincewide) that nonetheless was designed with a focus on serving those with the greatest need.

Finally, there was some ambiguity between partners during project design around differentiating those with whom the tool should be *piloted* versus those whom the tool would ultimately serve. A tool with widespread applicability was developed, while partners directed their use of the tool during the pilot to those clients for whom it seemed most appropriate.



■ ***What did we learn from others? What had already been tried? Why was it important to the issue at hand?***

Prosper Canada documented its early learning from the existing literature, from undertaking semi-structured interviews with researchers and service providers across Canada and from B.C residents with disabilities in a report (Prosper Canada 2021). This discovery work developed four clear learnings to inform project development: current benefit application processes are complex and unclear; the application process places a burden on healthcare providers that ultimately gets passed on to people with disabilities; each step of application calls for time, energy, connections, and access to resources that applicants may lack; and ultimately the dehumanizing effects of benefit application processes give people a strong reason to avoid them altogether. Consultations with potential users supported a recognition that providing benefit information alone would not be sufficient, and that the tool should also support people to draw on the information to apply for and newly obtain benefits.

Co-creation workshops with other important potential users, case managers and advocates, were well organized and generated important feedback and questions. However, input mainly focused on the specifics of design and delivery rather than the structure of the tool.

This work pointed to key principles that needed to be considered as the project moved forward even if it would be impossible to fully embrace them all. The principles emphasized: the need for a consistent human relationship throughout benefit application; clearly laying out the roadmaps to follow; findings better ways to engage with the disconnected; improving accessibility, as well as humanizing communications around benefits.

■ ***What were the identified challenges/gaps and opportunities/leverage points? How were they approached and/or addressed? What key practices emerged?***

A major challenge running through the project phases was how far the need to prioritize and focus project scope could conflict with partner organization mandates to be inclusive and serve everyone. At the same time, partners recognized that even with unlimited resources, an online tool could not provide every type of support needed. These challenges were addressed through a collective willingness to compromise, reaching consensus on what to prioritize, and articulating the challenge so as to optimize acceptance of the outcome of each decision.

Anticipated delivery issues included the potential that the tool would increase demand for partner services (e.g., the help function of the tool). A commonly held view was the need to prioritize managing client expectations around accessing in-person support and what the tool could and could not do. The project developed training and an operations manual to help manage client interactions as part of the service and – as described below for the pilot – partners were ultimately able to manage challenges around client expectations.

## Deliver

- ***What were the key elements of the designed service? How did participants use the service? How and why was it expected to work?***

Identified users of the service were people with disabilities, their friends and advocates, and staff. The service was designed to meet several different levels of need for multiple types of benefits in ways that would involve different service paths for different people. To meet these needs, the designed service included three core functional components.

- (a) Self-serve disability benefits navigation and advocacy in the form of the **Disability Benefits Compass online tool**. The tool was designed to provide people with disabilities, caregivers, and agencies access to self-serve materials to support the process of applying for four benefits: the People with Disabilities designation in B.C. (PWD), Disability Tax Credit certificate (DTC), Canada Pension Plan-Disability (CPP-D), and Registered Disability Savings Plan (RDSP). It gives step-by-step guidance, with tips, resources, and examples from advocates and peers, to help them navigate the complexities of these processes.
- (b) Clients who already were in receipt of these four disability benefits and/or who do not need to learn more about them were encouraged to link to the national online tool that Prosper Canada developed simultaneously, **the Benefits Wayfinder**. On that site, they could browse other benefits (including other disability and non-disability benefits) they might be eligible for.
- (c) Those who were unable to complete benefits applications for the four benefits highlighted by the Disability Benefits Compass had the option to connect with DABC, Plan Institute, British Columbia Aboriginal Network on Disability Society or any other organization offering a **Direct 1-on-1 advocacy service**. The project manual set out the steps by which staff could meet with and support clients through learning about benefits, their eligibility requirements and during the application process.

Pilot participants at DABC were primarily recruited through program emails. The Disability Benefits Compass online tool link was also posted on the DABC website and social media pages. Plan Institute integrated information about the tool into their various email templates. They also advertised the tool via email blasts, on their website and social media channels, as well as other resources.

When speaking about how participants would use the service, both Plan and DABC discussed the issue of wait times to see advisors and helpline team members, and the role the tool was expected to play in this process. Both organizations referred clients to the Tool to facilitate

speedy access to information and to facilitate progress on select components (“here are some things you can do while you wait”). Some saw this as supporting client autonomy.

Both organizations already use the website as a reference and to train their staff, and felt they were already seeing benefits from using the Tool in this way.

- ***How was the service implemented? How were stakeholders involved in prototyping, producing, and launching the service? What tools were developed to support its delivery and how were they used?***

In practice there was no real distinction drawn between the “service” as designed and the Disability Benefits Compass “tool”. The tool was integral to the service and the “human” service of direct 1-on-1 advocacy could be accessed by those who initially sought information more passively through the website. A pop-up from the site directly encouraged and enabled users who might need one-on-one help to obtain it from project partners.

The Tool was often described as providing a “hub for information” implying it had “spokes” to tie in additional and related assistance. Although people with disabilities and their supporters were identified as the main intended users of the service, partners felt that a key secondary function of the online resources was as a tool for training. The website supported the learning objectives of both Plan and DABC (e.g., training new staff, acting as a central information hub for staff).

The Tool was seen as addressing a gap in services for people with disabilities. Examples of key uses identified were: to help raise awareness of benefits available; to offer a starting point for those early in their benefit journeys; to provide information about specific benefits and fill information gaps; to provide accessible information for those waiting to see an advocate; and to support people advance in their benefit applications through improved information to make decisions. Providing information step-by-step to support decision-making was highlighted by as a key element of the Tool.

Embedding the Tool within the DABC service system was anticipated to streamline their processes (e.g., reduce workloads, decrease wait times if some are able to progress on applications and/or be better prepared for appointments). Since COVID-19, DABC has increasingly been serving clients from outside of its traditional catchment of the Lower Mainland. DABC saw the tool as allowing it to serve an expanded client base virtually.

- ***What key practices emerged? What worked particularly well and what could be done differently?***

The tool has become an integral part of services already offered by project partners. It has not been possible to determine how well having an online self-serve tool helps moderate

demand for one-on-one advocacy work. Keeping such staff-intensive work at manageable levels is critical. In general, the transition to using the tool appears to have been “managed very well” with support for the launch well organized, matched by clear communications.

Challenges encountered along the way have included finding even better ways to translate complex and often contextual information in an online context. Taking extra time and going through multiple iterations, in ways not always compatible with time-limited projects, appears a necessary part of this process.

Some suggested that it would have been helpful to integrate Indigenous perspectives throughout the process, and to develop next steps for better supporting Indigenous client needs.

## Pilot

- ***Who were the participants and how did they use the project/service? What was the take-up and satisfaction with the service? What were the users’ recommendations for improvement or what else is needed?***

In the 12-month period from June 4, 2022 to May 30, 2023, there were 5,245 visitors to the website from British Columbia, with approximately one third from Vancouver and the others spread out across the province. Survey and interview results indicated most visitors were people with a disability looking for information about benefits. Most users interviewed were repeat visitors to the site in search of specific information applicable to them and had also shared the website with others looking into services and benefits. Family members/advocates and staff members at organizations supporting people with disabilities also accessed the site, albeit to a lesser extent to support their loved ones/clients.

According to website metrics, in the 12-month period from June 4, 2022 to May 30, 2023, the Persons with Disabilities Designation page was the most frequently accessed landing page with 1,731 visitors (52 per cent). Between 366 and 613 visitors accessed the other three landing pages: CPP Disability Benefit, Disability Tax Credit, and Registered Disability Savings Plan. The Welcome to DBW/DBC page was the most frequently viewed page overall with 7,093 views. Survey respondents’ ratings of the website were moderately high with averages ranging from approximately 6.5 to 7 out of 10 in terms of ease of use, ease of understanding the Information, and overall helpfulness. As well, just over one third of survey respondents (36 per cent) indicated they found the information they were looking for on the website.

Suggestions for improving the website offered by survey respondents and interviewees (both users and case managers) included the addition of a statement alerting users that “*These are*

*not the only benefits you may be eligible for,”* more visible contact information for support organizations, videos and/or other visuals to supplement the website information, examples of wording/key word suggestions and types of examples to include in application forms, specific types of information (including on benefit renewal, Bill C-22, and how to find a doctor), tool translation into other languages, and means for saving or printing information (e.g., an app or PDF) and emailing it directly to others.

Looking to the broader system of benefits, survey respondents and users interviewed noted several challenges, including difficult-to-understand information on government websites, uncertainty about what benefits are available or for which they might be eligible, complicated application processes (or uncertainty about where or how to apply), complicated eligibility requirements, and long wait times for application outcomes. Suggested improvements to the benefits system overall included making the benefit application process more straightforward overall, adding information on Bill C-22, providing more resources for mental health support, and better promoting the RDSP specifically.

- ***How does the Tool work? What are its perceived benefits? What changes, if any, can be attributed to the use of the Tool?***

According to users interviewed, the most helpful features of the tool included its user-friendly navigation, easy to understand, plain language contents, inclusion of specific pieces of information (e.g., steps for applying, tips for filling out forms, glossary), and links to other resources to help with application processes. Case managers interviewed agreed the website was user-friendly with cohesive organization of information and also found it visually appealing. Eighty-nine per cent of survey respondents said they would recommend the website to a friend.

Repeat users interviewed felt the website had: made a positive difference in their lives; helped them understand how to qualify for benefits; provided an accessible way to access information especially if experiencing mobility or mental health issues; and supported their applications.

- ***What are the key lessons learned from the project? What key successful practices emerged? What elements of the project could be scaled up and how?***

Based on the feedback of users and case managers consulted for the evaluation, the website appears to be doing its job in terms of providing a clear and helpful resource to help increase access to government benefits for people with disabilities in BC. Overall, it appears to be a clear and helpful resource that provides the necessary information and steps for applying. For the most part, the recent suggestions provided by users and case managers – who are experts in what they need and want from the tool – appear manageable, if not easy to make to enhance the user experience and uptake of the tool.

The tool is intended as a means for individuals to access benefits information directly. While many users can be presumed to have accessed the website independently, it appears that in some cases, orientation or assistance from an advocate or other staff member might be needed to support tool use or help maximize its value to clients.

Depending on stakeholder interest and available resources, the addition of more information on available benefits, beyond the main four already included, could provide a fairly immediate opportunity for scaling up. Looking to further into the future, there may also be opportunities to explore opportunities for collaboration with other jurisdictions and to explore the pros and cons of combining the Compass tool with the Benefits Wayfinder.

## WHAT NEXT STEPS MAKE SENSE AS A RESULT OF THE FINDINGS?

Next steps for consideration include:

- Continuing to **evaluate** the tool and the extent to which it meets users' needs. For example, it would be worthwhile investigating the causes and impact of the dramatic increase in use of the tool in June and July 2023, after the close of the evaluated period.
- Continuing existing and commencing new **knowledge translation**/sharing activities to share project findings with stakeholders outside the project team (e.g., through conferences, webinars or short briefing documents, including accessible primers for the public) and gauging their interest/ability to support next steps. There may be a need to connect the Tool to both broader and sub-population focused advocacy organizations (e.g., BC211, PovNet, ClickLaw, food programs, student support at universities and colleges) to increase access and responsiveness.
- At the same time, there is a need for careful consideration of **optimal ways to engage and better serve Indigenous people** with disabilities, both from the perspective of benefit design as well as application support and online tool provision.
- Convening **knowledge mobilization** whereby the project team and associated organizations can review and discuss which suggestions for improvement are most warranted and feasible then develop a prioritized action plan to address them. Possible examples include:
  - Translating the tool content into other languages in order to enhance equitable access to the tool, including videos with American Sign Language. Developing capacity to support benefit access journeys at other organizations.

- Exploring **future funding** options to support the continuation, improvement, and/or scale-up of the tool. One key theme regarding the future of the Tool centres on its continued sustainability, including who will be its long-term custodian and ensuring the information remains accurate. There were concerns that if the Tool does not continuously evolve, it will become outdated or counterproductive.
- Taking concrete steps with the aim to **tackle some of the systemic barriers** identified by the project, such as reducing benefit complexity, addressing benefit adequacy, reducing wait times and streamlining application processes more generally. Options might include:
  - Encouraging policy makers to keep benefit systems under review;
  - Fostering meaningful consultation between providers and users of existing benefit systems; and
  - Benefit co-design: integrating persons with lived experience and other experts into a facilitated design and development process for benefit reforms (whether large or small).

## WHAT QUESTIONS DO THE FINDINGS RAISE FOR FUTURE EXPLORATION?

The results of the evaluation raise many questions for future exploration, should the opportunity arise:

- What is hindering non-users from accessing the tool (e.g., lack of awareness, lack of need, personal preferences)?
- What do individuals who abandoned use of the tool have to say about it?
- To what degree does the support of an advocate enhance users' experiences with the tool?
- To what degree do users want or need to use the tool over the long term?
- What synergies might be gained from collaboration with other jurisdictions?
- Learn more about secondary uses for the tool: to become a training hub for people from across the province, how best to foster links to other systems or supports (including links accessed through major government websites (e.g., CRA); and to build advocacy capacity.

Finally, the evaluation heard frequently about the need for a broader perspective in supporting people with disabilities, raising questions about the optimal role, positioning of and support for

online tools within the broader system of supports (of which a financial pillar is only one). A key challenge in Canada arises from the shared jurisdictional responsibility for benefits, which generates questions about responsibility for system-level issues. The introduction of the new Canada Disability Benefit will again throw into question the creation of complex inter-relationships between benefits that this system forces users and their supporters to navigate.



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## APPENDIX A: ADDITIONAL WEBSITE METRICS

Table 9 Visitors to Disability Benefits Compass by link click source (Jun 4/22 – May 30/12)

Source of click link	%
DABC website	38%
Direct to website/Google	36%
Facebook	3%
Plan resources	2%
DABC email	2%
Plan website	2%
Plan helpline	1%
Investmentexecutive.com	1%
RDSP email	1%
All others (DABC training, YouTube, Newswire, LinkedIn, various browsers)	14%

OTTAWA • VANCOUVER • CALGARY • HAMILTON • MONTREAL

REGINA • ST. JOHN'S • TORONTO • WINNIPEG



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