



# Foundations of Access to Benefits

Supporting Canadians living on a low income with access to benefits





# Land acknowledgement



# Welcome

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# Technology Requirements



Please make sure you have **camera and microphone capability**. A **headset/earbuds** will also help minimize audio feedback or echo.



Please keep your **video display on** and **microphone muted** unless otherwise instructed.

# Agenda

- Your role in supporting access to benefits
- Starting conversations about money
- Using the Benefits wayfinder
- Scavenger hunt
- Summary



# What to Expect



- Variety of learning formats (presentation, group activities, small group practice, general discussion)
- Opportunities to practice:
  - Navigating the Benefits wayfinder
  - Money conversations using the tool
- Invitation to reflect on your personal financial experiences
- A safe, respectful space of learning

# Your role in supporting access to benefits



# Why does access to benefits support matter?



Reflect on the impact that benefits can have on individual or family, particularly for those living on a low income.

Can you think of an example from the community members you work with that illustrates the importance of access to benefits?



# Why does access to benefits support matter?

- You can help individuals access and receive benefits that they are eligible for
- Improved financial well-being and efficacy
- Improved overall quality of life



# How can frontline staff support individuals to access benefits?

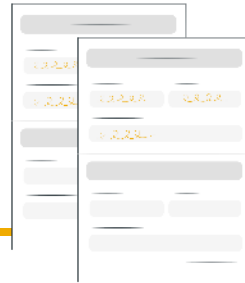
## Identify eligibility

- Ask whether the individual is aware of benefits and use the Benefits wayfinder to identify eligibility



## Support application

- Make an action plan
- Create a to-do list
- Have check-ins to keep the individual on track
- Assist with forms and other practical needs



## Refer to additional resources

- You don't need to have all the answers!
- Refer as needed to reputable resources
- Build a list of common referrals



# Starting conversations about money



# Trauma-Informed Approach

## Safety

Hold conversations in a private area

## Choice

Ensure individual knows they are in control of all decisions

## Collaboration

Individual has significant role in how the process unfolds

## Trustworthiness

Respect confidentiality

## Empowerment

Acknowledge and validate



# Screening questions to determine if a benefits conversation would be useful



1

Have you filed your taxes for the past five years?

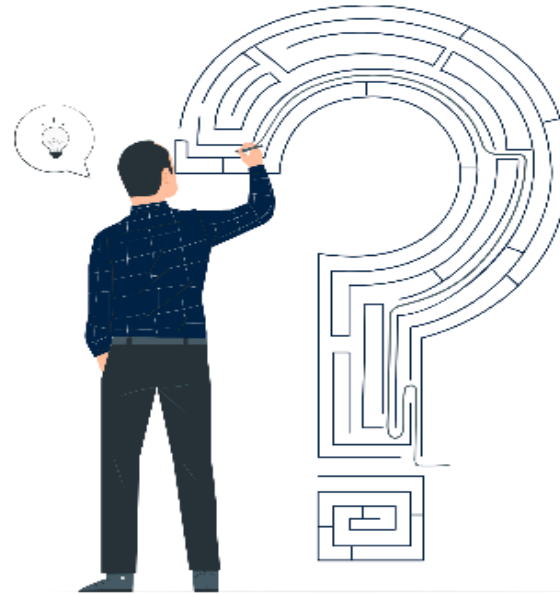
2

Have you recently experienced, or are you coming up to a big life change?

3

Do you have enough money to make ends meet?

# Conversation Pathways



**Pathway 1**  
(Public/on-the-job)

**Pathway 2**  
(In a 1:1 money  
conversation)

**Pathway 3**  
(In a 1:1 meeting in  
a related field)

# Conversation Pathways

## Tips for Pathway 1

### Pathway 1 (Public/on-the-job)

- Be sensitive of the public situation.
- Ask closed questions to respect privacy.
- Leave more detailed discussions to a dedicated 1:1 meeting.

Open the conversation with something like  
*"I'd like to ask a few questions to identify other ways we might be able to help. Would you be willing to answer a few questions?"*

If willing, ask the screening questions.

If appropriate, ask if they would be interested in exploring benefits.

If interested, set up a dedicated 1:1 meeting.

# Conversation Pathways

## Pathway 1 (Public/on-the-job)

- Ask closed-ended questions to respect privacy.

### Phrases for Pathway 1

Would you be interested in exploring whether you might be eligible for any benefits to help increase your income?

Did you know there are benefits that may be able to help?

Have you explored the possibility of getting some benefits to increase your income? If not, would you like some support in exploring that possibility?

I know about some resources that may help you find out if you could be receiving benefits. Would you be interested in learning about that?



# Conversation Pathways

## Pathway 2 (During a money conversation)

- You are already talking about finances.
- You are already in a 1:1 private meeting.

## Tips for Pathway 2

Ask the screening questions as part of the broader financial conversation.

Consider open-ended questions about improving their financial situation / increasing income.

If participant identifies need for increased income, ask if they are interested in checking for benefits.

Proceed based on participant's interest.

# Conversation Pathways

## Phrases for Pathway 2

### Pathway 2 (During a money conversation)

- Consider open-ended questions about the individual's financial situation.

What are some things that could help your financial situation right now?

Have you considered any ways to increase your income?

What ideas do you have about improving your financial situation?

What steps have you already taken to improve your financial situation/increase your income?

# Conversation Pathways

## Pathway 3 (In a related field)

- Consider open-ended questions to identify the individual's stressors.
- If a need for increased income or reduced expenses is identified, this is a great way to lead into a benefits conversation.

## Tips for Pathway 3

Use open-ended questions to identify the individual's stressors.

If a need for increased income is identified, share that there may be benefits that could help.

If participant is interested, proceed with the screening questions.

Set up a dedicated meeting to explore further, as makes sense.

# Conversation Pathways

## Phrases for Pathway 3

### Pathway 3 (In a related field)

- Use open-ended questions to identify the individual's stressors.

What's causing you the most stress right now?

What are you most worried about right now?

What are some of your short-term money goals?

# Conversation Pathways

## Tips for All Pathways

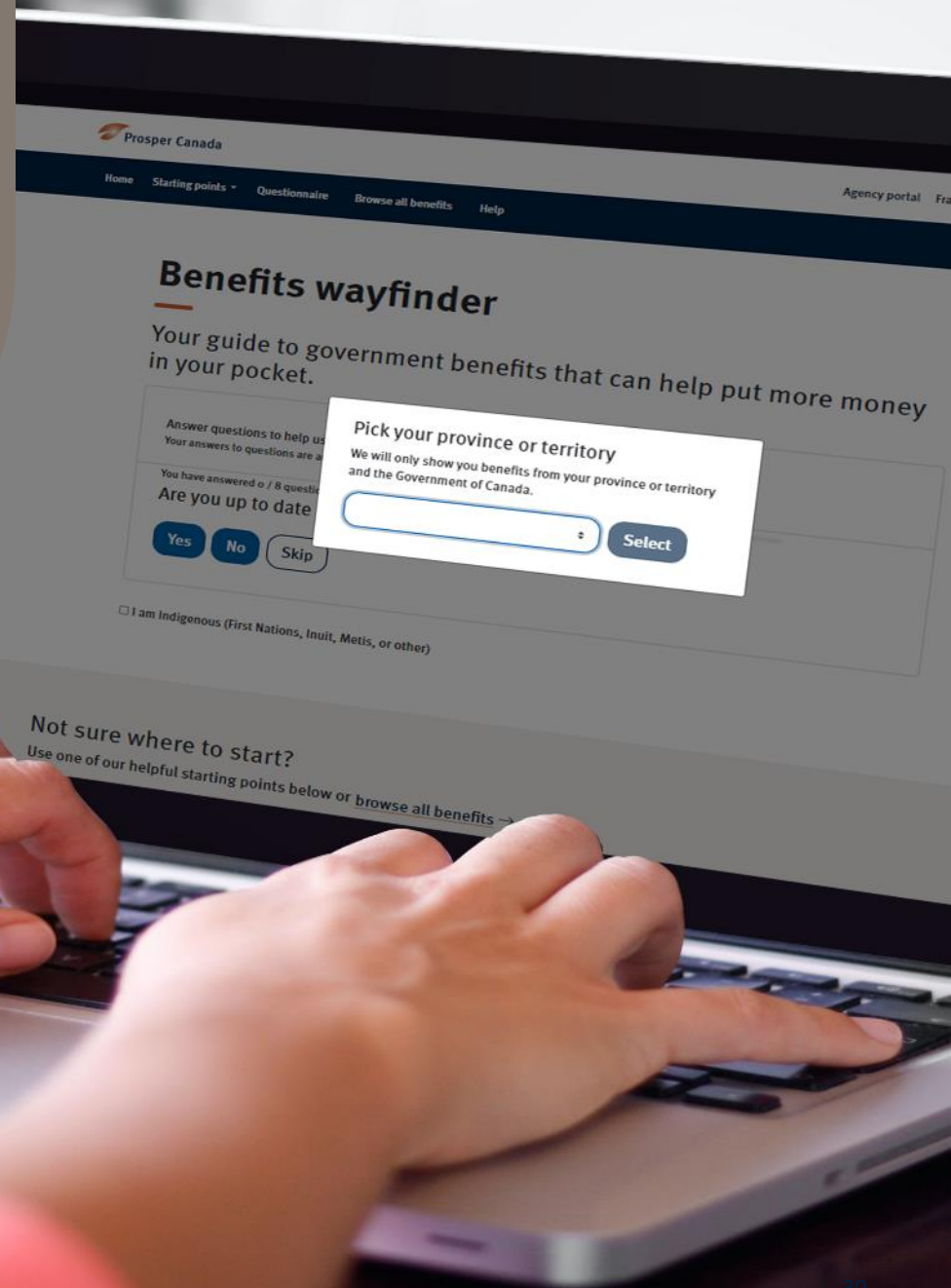
Set realistic expectations and avoid saying things like, "You will probably be eligible for..."

Follow the participant's lead / preferences

Remember your role is to support the process. Avoid giving direct advice or trying to "fix" things.



# Navigating the Benefits wayfinder



# Introduction to the Benefits wayfinder

The Benefits wayfinder is a tool that helps individuals identify and apply for the benefits they are eligible for.

- Personalized recommendations
- Benefits overview and details
- Dashboard to organize benefits

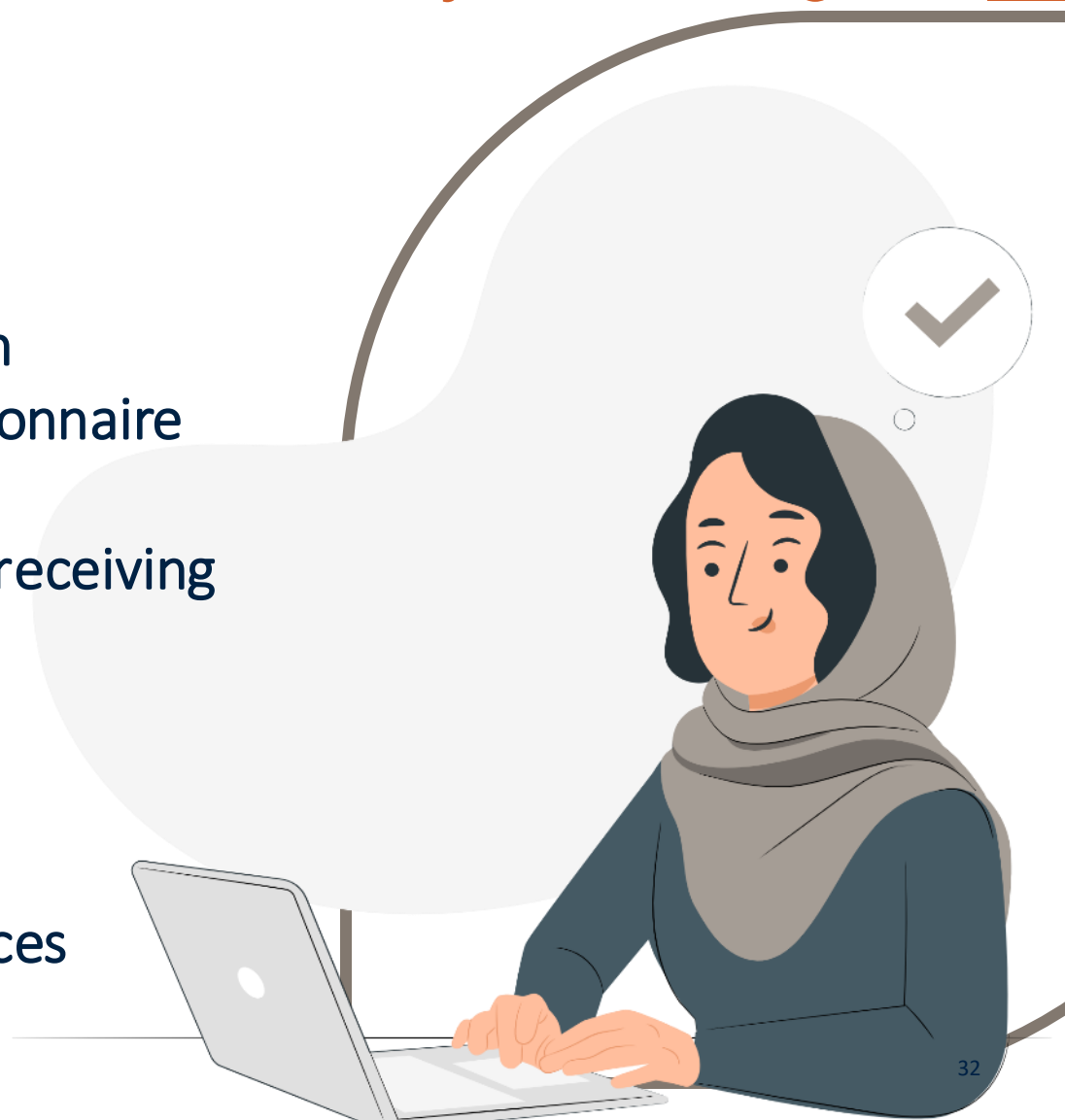
[benefitswayfinder.org](https://benefitswayfinder.org)



# Navigating the tool

[benefitswayfinder.org](https://benefitswayfinder.org)

- Choosing your location
- Completing the questionnaire
- Starting points
- Already receiving/not receiving
- Browse
- Dashboard
- Benefits info pages
- Share
- Help and more resources





# Practice



# Practice Activity: Exploring Benefits

Time	Activity
5 minutes	<p>Read your persona with your partner/group Select one person to be the client and one to be the service provider</p> <ul style="list-style-type: none"><li>• If a group of three, the third person can be an observer or follow along using the Benefits wayfinder</li></ul>
5 minutes	<p>Using the Benefits wayfinder, navigate the tool and find the top two benefits this person may be eligible for Think about the questions you might ask them or the conversations you may have as you do this.</p>
5 minutes	<p>Try a different persona or a different way of accessing the benefit information (ie. Starting point vs questionnaire)</p>
5 minutes	<p>Debrief with partner and share reflections</p> <ul style="list-style-type: none"><li>• Be prepared to share your findings and experience using the tool with the larger group</li></ul>

# Client personas



- Sergio
- Rabia
- Denise

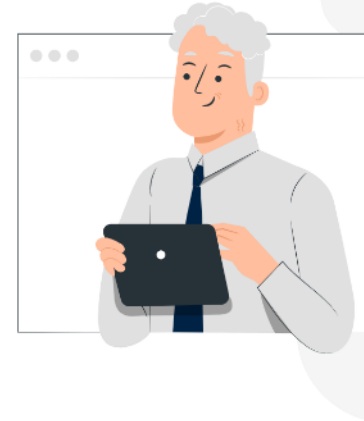
How might you use the Benefits wayfinder to assist these people?

# Debrief & Discussion

- What benefits did you find your persona was eligible for? Was this helpful?
- What potential **uses** do you see for this tool? What potential **barriers**?
- How could the tool be used with 10 min vs 30-60 min with a client?



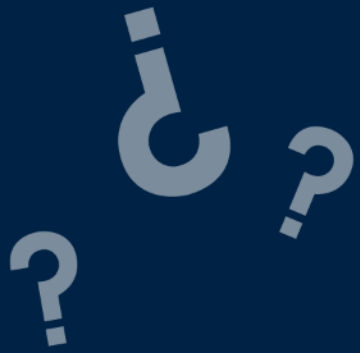
# Referring to other resources



- Tax filing clinics, ID clinics, community support or advocacy organizations
- [Benefits wayfinder “Help” section](#)
- [Benefits wayfinder Agency Portal](#)
- Training module: “Supporting access to benefits”
- [Supporting client intake, triage, and referral](#) (Prosper Canada tip sheet)

# Summary & Conclusion

- Frontline workers have a unique opportunity to support people with access to benefits
- Assess the setting that you and the individual are in. Consider using one of the conversation pathways to bring up the topic of benefits and look for opportunities ask the three screening questions.
- The Benefits wayfinder identifies and organizes benefits an individual may be eligible for. It can be used in different ways to meet an individual's needs.



Any questions?



# NEW resource!



- Disability Benefits Compass
- Providing information about the ***four key disability benefits*** for persons with disabilities in your province or territory.
- [Welcome to Disability Benefits Compass - Disability Benefits Compass \(benefitswayfinder.org\)](https://benefitswayfinder.org)



# Additional Resources

- [Benefits wayfinder](https://benefitswayfinder.org) (benefitswayfinder.org)
- [Benefits wayfinder video](https://www.youtube.com/watch?v=3L3y4d35auo)  
(https://www.youtube.com/watch?v=3L3y4d35auo)
- Benefits wayfinder support guide for frontline service providers
- [Foundations of Access to Benefits online course and other Prosper Canada training](https://training.prospercanada.org/) (https://training.prospercanada.org/)
- [Prosper Canada Learning Hub](https://learninghub.prospercanada.org/) (https://learninghub.prospercanada.org/)

# Thank you for attending this workshop

Please take a moment to provide your feedback by completing a survey.

The Benefits wayfinder is developed by



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