Tool 4

Designing the initiative: the service blueprint

About this tool

Having completed an internal and external scan of barriers and opportunities, you are now ready to customize your financial empowerment (FE) initiative to suit your municipality's context. Designing the initiative is an important phase where you work out the service model, clarify partnerships, and imagine the ideal client experience.

This tool guides you through choosing the best partnership or service delivery model for your context and designing the client and staff journey.

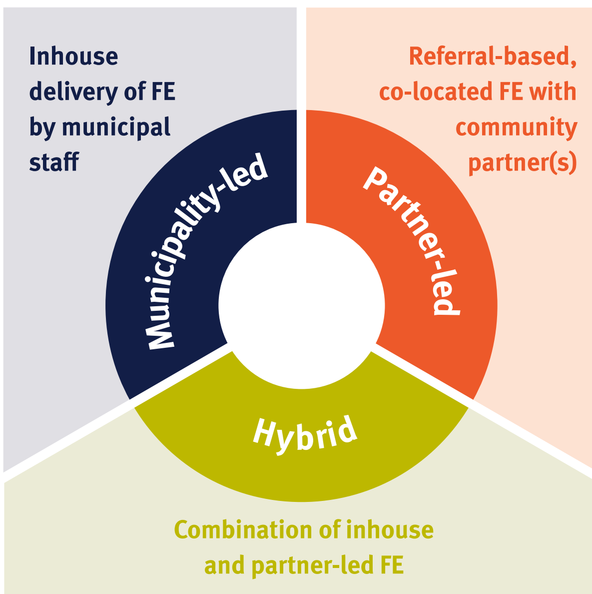
What to do

1. Recall readiness factors from **2B. Readiness** worksheet.
2. Recall partnership opportunities from **3D. Ecosystem** map.
3. Choose a service delivery model that meets your needs and capacities in **4A. Three models of FE delivery.**
4. Review examples in **4B. Learn about service blueprints.**
5. Envision an ideal service journey with **4C. Build the service blueprint.**

4A. Three models of FE delivery

It is important to understand FE not only as a menu of FE service options (e.g. tax filing, benefit navigation, financial counselling, etc.), but also in terms of an appropriate delivery model.

Keep in mind there is no "right way" to embed FE. You can use any combination of the approaches, depending on capacity and need. To help visualize, consider how tax filing supports might work in each model.



Tax filing?

Municipal staff deliver the tax filing intervention, with community partners serving as channels for referral.

- For example, simple cases only, annual supports... simple tax wins!

Partner organizations deliver the tax filing intervention, with municipal staff and offices operating as channels for awareness-building and referral.

- For example, simple & complex cases, ongoing supports... partner power!

Both community partners and municipal offices deliver tax filing services, perhaps seeking to specialize between them or divide up the workload to provide greater access.

- For example, simple & complex cases, rolling/annual supports... teamwork, dreamwork!

Which model best suits your municipality's needs, capacities, and opportunities? Brainstorm the ideal model for your municipality.

Model

Partner(s):

Key features:

4B. Learn about service blueprints

What is a service blueprint?

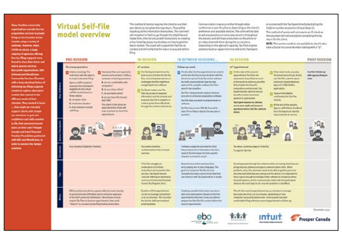
Service blueprints allow you to map out how the whole service will work by breaking down each step and identifying the touchpoints, tools, systems, and supporting structures needed within that step. While you can use blueprints to showcase your current model of delivery, a future state blueprint allows you to imagine an ideal journey and show the linkages between different stakeholders across that journey.

How to read a service blueprint

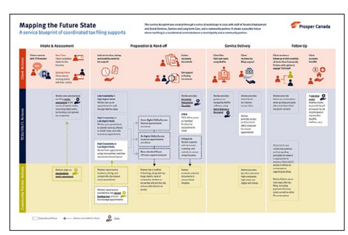
- The top row of the blueprint typically shows common journey stages a client undergoes. For example, in the Toronto sample blueprint below, the municipality identified Intake and assessment, Preparation and handoff, service delivery, and follow-up as the 4 main stages of the client's journey.
- Below the top row, the blueprint outlines an ideal client journey. Linking into that ideal client journey are a set of supporting actions, infrastructure, and policies enabled by City and community agency partner teams.
- Arrows throughout the map demonstrate the client flow, linkages into that flow from supporting teams, as well as integration points within City income-geared and/or benefit programs and community agency partners.
- Visualizing frictions or challenges within a client's service journey can be useful in identifying and highlighting points in the service flow where a client might "fall out" or "get stuck" in their tax filing journey.

Sample service blueprints

These blueprints were created to map out two unique FE services. Review these to see examples of tools, touchpoints, systems, etc. that other municipalities have found helpful to include in their models. Each blueprint takes a different approach to visualizing the ideal journey.



Virtual Self-File. This blueprint was created by two community organizations to imagine how they might support individuals to file their taxes remotely in the midst of the COVID-19 pandemic. This type of service blueprint emphasizes the key touchpoints and tools required to make each step a success.



Toronto. This municipality used the blueprint to map out a coordinated tax filing service with a community partner. They chose to focus more on the actions taken by each actor (including the client) to visualize who does what, when, and how.

4C. Build the service blueprint

Once you have a sense of the delivery model, work with colleagues, partners, and potential clients of the service to imagine the ideal service experience, using the template in this section. You can adapt the template and map out the elements that will be important in your service model.

In talking with several jurisdictions delivering municipal supports over the last year, we have learned that a client's journey might be grouped into five phases:

1. Discover
2. Intake and assessment
3. Preparation and (where applicable) handoff
4. Service delivery
5. Follow-up

Example: Ideal service journey

Discover

Dana's caseworker realizes that Dana hasn't filed last year's taxes, and identifies that Dana can get support for that – the caseworker uses the Benefits wayfinder tool with Dana to identify possible income sources that tax filing can 'unlock'.

Intake and assessment

In a deeper conversation, the caseworker learns more about Dana's situation, using an assessment tool to determine whether her situation is simple and therefore if the caseworker can help them directly; it's not, so they recommend that Dana sign up for a community clinic in April.

Preparation, and in some cases handoff

The caseworker completes a referral and schedules Dana for a session; the community partner has a predetermined checklist of preparation materials, which the caseworker shares with Dana; the caseworker also checks in with Dana prior to the session to make sure they're ready.

Service delivery

During the session, the community partner provides robust support to Dana, helping to work through past year taxes and around a complicated family situation.

Follow-up

After the session, the community partner offers to have a three-way call on next steps with Dana's caseworker, if Dana chooses.

4C. Build the service blueprint

Consider the actions taken by actors at each phase, as well as the touchpoints being used (service office, phone, website, etc.). Discuss what tools, technology, and systems need to be in place to allow for these interactions to happen. Use the template below and the sample service blueprints in 4B to see how other municipalities used and adapted the template.

How to use a service model blueprint

This tool is not intended to outline a fully realized service. Instead, it should be used as a starting point for ongoing discussions with stakeholders. It represents an ideal future state and may be used to:

- Identify low-hanging fruit and quick wins,
- Identify long-term priorities or areas for investment
- Discuss hand-offs and transition points
- Explore new models for service delivery, metrics and possible areas of friction

Template: Service Blueprint

	Learning about the service	Intake and needs assessment	Pre-session preparation	Receive FE support	Follow-up after support
Client actions					
Touchpoints or channels of communication					
Municipal staff actions					
Partner staff action					
Line of Visability					
Tools & Technology					
Systems & Artifacts					
Measurement Opportunities					