

Exploring the Benefits wayfinder

For this activity, you'll practice assessing needs, and using the Benefits wayfinder tool.

This is an informal activity and a chance for you to practice in a safe environment.

Time	Activity
5 minutes	Read the assigned persona(s). Decide who will be the client and who will be navigating the Benefits wayfinder tool. Or, if you prefer, you can both navigate the tool to get familiar with it.
10 minutes	Use the Benefits wayfinder to find three suggested benefits for the persona. Try the following: <ul style="list-style-type: none"> • Use the persona to answer the Questionnaire • Begin with "Starting points" to search for suitable benefits • Try browsing "Browse all benefits" to find suitable benefits • Use the "Help" tab to explore an agency near you that provides 1-on-1 help for clients • Explore some of the other features: <ul style="list-style-type: none"> • Use the Agency portal - Benefits wayfinder • View the instructional video for how to use the tool
10 minutes	Switch roles and/or personas or continue to explore the functionality of the tool. See if you can email the information you have discovered to yourself!
5 minutes	Debrief with your partner and be prepared to share findings and reflections with the larger group.

Reflect on the following:

- Consider how you might prefer to use this tool with a client. Be aware of the amount of time you have with an individual and whether they will require support to navigate the technology. What if they are wary of providing their information online? How would you use the tool with them?
- What tool(s) or information do you think you will find most useful on this site?
- What benefits or challenges do you see to using this tool with a client?

Tips for the breakout room:

- You can share screens and use the whiteboards to share ideas if you would like to.
- Keep track of how much time you have for this activity and make sure both partners get a chance to navigate the Benefits wayfinder.
- You can return to the main screen at any time to review these instructions and use the chat to contact us if you have any questions or would like us to come and join you in the breakout room for a discussion.
- We will also be visiting throughout the activity to see how you are getting on.
- When we come back together, we will be discussing your thoughts on the Benefit wayfinder tool.

Personas

Name: Sergio

Age: 33

Status in Canada: Newcomer (temporary resident)

Place of residence: Neslon, BC (renting)

Income level: \$40,000/year

Work: Full-time job as a chef

Tax filing history: Has not filed Canadian taxes before

Financial situation and goals: I currently have enough money to meet my needs. I want to open my own restaurant one day, and to save enough to visit my family in Spain at least once a year.

Background: I recently moved to Canada from Spain with my two sons and my wife, whose work moved her to Nelson, British Columbia. I was born in Spain and have lived there my whole life. I speak Spanish and my English is ok. I left my parents and siblings but hope we will come back to visit them often. We are hoping to get our Permanent Residency in Canada.

I'm feeling excited about the move to Canada but overwhelmed because everything is new and my English isn't that great. My brain is in overdrive trying to remember everything.

I am going to a newcomer centre today to ask about how to make a savings plan to work towards a family trip back to Spain during the holidays.



Name: Rabbia

Age: 19

Status in Canada: Citizen

Place of residence: Oakville, ON

Income level: \$23,000/year

Work: Part-time hours as a server

Tax filing history: Has only been eligible for one year, but did not file last year

Financial situation and goals: I currently do not have enough money to meet my needs. My priority is to find a safe home for me and my baby on the way. I want to give my baby a good life, but I feel like a bad mom because I can't even provide the basic needs with the money I make waitressing. I want to go back to school but can't afford to.

Background: I recently was kicked out of my home after my parents found out that I am pregnant. I don't have any other family in the city and I have nowhere to go. For the past few nights I've slept on a friend's couch, but I won't be able to stay there much longer. If this continues I might have to sleep on the streets which is very scary to me. I need to figure out a long-term solution.

I'm feeling really anxious about what the future has in store for me. I never wanted any of this to happen but now I have to figure it out somehow.

I am going to an appointment at Halton Community Housing Corporation today to figure out if I can live somewhere safe. The winter is coming up and I'm not sure where to go.



Name: Denise

Age: 64

Status in Canada: Permanent Resident

Place of residence: Halifax, NS (own home)

Income level: \$14,560/year

Work: Part-time hours, customer service

Tax filing history: Has filed taxes for the past five years

Financial situation and goals: I currently am struggling to make enough money to make ends meet. I only work part-time because I need to care for my aging mother. I'm all she has left after my father passed away earlier this year. I want to make sure she has everything she needs and is cared for, but it takes a lot of energy and I feel like between that and trying to work and dealing with my dad's estate, I'm running on empty.

Background: My mom went to her audiologist last week for a checkup and it looks like she needs a new pair of hearing aids. The thing is, we can't afford them right now. I'm going to the healthcare worker from the senior's program at our community centre to see if they think the new pair is really necessary or if we can make do with the pair she has now. I think a second opinion would help. We tried to do an online appointment because we're nervous about the COVID-19 pandemic (my mom's not in great overall health), but we couldn't figure out the link. I've never been good with computers. But that's ok, I'm sure an online appointment could be hacked anyway, and I don't want our personal information on the internet.

I want to do whatever I can to provide for my mom, but I'm feeling guilty that I can't do everything.

