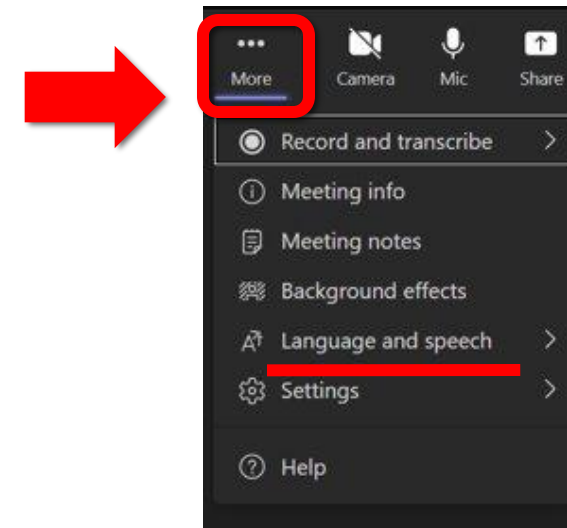
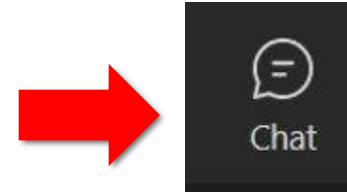


# Technology requirements

- **Audience members have all been put on “mute”** for this webinar.
- **Please share any questions you have using the “chat box”** (located in the menu bar at the top of your screen).
- For **closed captioning**, on the top right menu bar, click the three dots with the word ‘More’ under it, then select ‘**Language and Speech**’ and then ‘**Turn on Live Captions**’.
- **We will share webinar slides with all participants and post a recording** of the session within a few days.





# Supporting with access to benefits

February 6, 2025

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# Who we are

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**Founded in 1986, Prosper Canada is a national charity dedicated to expanding economic opportunity for Canadians living in poverty** through program and policy innovation.

As **Canada's leading champion of financial empowerment**, we work with governments, businesses and groups to develop and promote financial policies, programs and resources that transform lives and foster the prosperity of all Canadians.

**We help service systems and organizations in all sectors to build proven financial empowerment approaches into their businesses** in ways that:

- Are **sustainable**
- Help them **achieve their goals**
- Tangibly **increase the financial well-being of the low-income people** they serve.





# Land acknowledgement

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Join at [menti.com](https://menti.com) | use code 1953 0290



# Welcome

To get to know each other



# Agenda

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1. Your role in supporting access to benefits
2. Starting conversations about benefits
3. Using the Benefits Wayfinder
4. Personas: Exploring benefits
5. Additional resources and summary



# What to expect

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- Variety of learning formats (presentation, individual practice, general discussion)
- Opportunities to practice:
  - Navigating the Benefits Wayfinder
- Invitation to reflect on your personal financial experiences
- A safe, respectful space of learning



# Your role in supporting access to benefits

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# Why does access to benefits matter?



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

## **Cloud:**

- What impact does access to benefits have on the people you serve?



# Why does access to benefits 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 and 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

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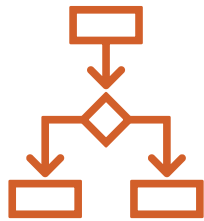
# Trauma-informed approach

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## 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 unfold



## Trustworthiness

Respect confidentiality



## Empowerment

Acknowledge and validate

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

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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

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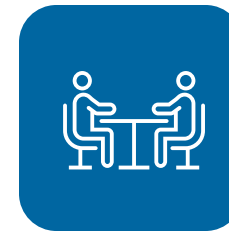
## Pathway 1

(Public/on-the-job)



## Pathway 2

(1:1 money conversation)



## Pathway 3

(In a 1:1 meeting in a related field)



# Tips for Pathway 1

Public/on-the-job

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Open the conversation with something like:  
*"We could explore benefits that you might be eligible for. Would you be interested"*

If willing, ask the screening questions.

If appropriate, ask if they would be interested in exploring the Benefits Wayfinder tool.

If interested, set up a dedicated 1:1 meeting or share the link with them.



## Tips for Pathway 2

During a money conversation

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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 person's interest.

## Tips for Pathway 3

In a related field

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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 person is interested, proceed with the screening questions.

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

# Tips for all Pathways

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- Set realistic expectations and avoid saying things like, "You will probably be eligible for..."
- Follow the individual's lead / preferences
- Remember your role is to support the process. Avoid giving direct advice or trying to "fix" things.

# Navigating the Benefits Wayfinder

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# Introduction to the Benefits Wayfinder

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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



 Easy application  Tax filing required  Identification required

*Please note: We are not benefit experts*

# Practice

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# Client persona: Sergio

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- **Age:** 33
- **Status in Canada:** Newcomer (temporary resident)
- **Place of residence:** Fergus, ON (renting)
- **Income level:** \$40,000/year
- **Work:** Full-time job as a chef
- **Tax filing history:** Has not filed Canadian taxes before





# Practice Activity: Questionnaire

## Exploring Benefits



Primary sponsor



Agency portal Français

Ontario ▾

Home

Starting points ▾

Questionnaire

Browse all benefits

Help

Dashboard

Time	Activity One: Questionnaire
10 minutes	Open the <b>Benefits Wayfinder</b> main page. Select <b>Ontario</b> as your province and open the <b>Questionnaire</b> . (blue tab across the top.) Answer the questions based on the persona, <b>Sergio</b> . <i>What are the top three benefits for Sergio?</i>
5 minutes	<b>Debrief:</b> In the large group, share your experience using the Benefits Wayfinder Questionnaire.

Activity in  
progress:  
We will be back shortly



# Debrief and Discussion

Sergio

What benefits did you find **Sergio** was eligible for? Was this helpful?



# Client persona: Rabbia

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- **Age:** 19
- **Status in Canada:** Citizen
- **Place of residence:** Anytown, Canada
- **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



# Practice Activity: Starting points

## Exploring Benefits



Primary sponsor



Agency portal Français

Ontario ▾

Home **Starting points** ▾

Questionnaire

Browse all benefits

Help

Dashboard

Time	Activity Two: Starting Points
10 minutes	Open the <b>Benefits Wayfinder</b> main page. Select your province and open the <b>Starting points</b> . (blue tab across the top.) Answer the questions based on the persona, <b>Rabbia</b> . <i>What are the top three benefits for Rabbia?</i>
5 minutes	<b>Debrief:</b> In the large group, share your experience using the Benefits Wayfinder Starting Points.

Activity in  
progress:  
We will be back shortly





# Debrief and Discussion

Rabbia

What benefits did you find **Rabbia** was eligible for?

What method did you prefer?



# Using the Disability Benefits Compass

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# The Disability Benefits Compass

An online tool that provides information about the **four key disability benefits** in your province or territory.

## Including:

- Plain language and designed by people living with a disability and support staff.
- Within each step are tips, examples, frequently asked questions (FAQ), resources, challenges you may encounter and who to contact for help
- Find out what to expect after you apply and the next steps to take if your application is approved or denied

<https://disability.benefitswayfinder.org>

The project is funded in part by the Government of Canada's Social Development Partnerships Program - Disability Component.

Canada 



# Using the Disability Benefits Compass

The screenshot shows the website [disability.benefitswayfinder.org](https://disability.benefitswayfinder.org). The page title is "Disability Benefits Compass". A modal dialog box is open, asking "What province are you from?". The modal contains the text: "Knowing your province helps us make this tool the best experience for you." Below the text is a dropdown menu with "Alberta" selected and a "Select" button. The background content is partially obscured but includes a navigation bar with "Home", "Disability benefits", "Glossary", "Resources", and "Help". There are also buttons for "View key benefits" and "Help getting started". At the bottom right, there is a "Need help?" button with the text "An agency worker can help you use this tool."

# Using the Benefits Wayfinder and the Disability Benefits Compass

- 1. Use yourself** - find information, training
- 2. Use with community members:**
  - a) Taxes not filed – benefits available
  - b) Taxes filed – benefits checkup
- 3. Encourage money conversations:**
  - a) Tax clinic – refer to dedicated benefits navigator
  - b) 1-to-1 follow-up appointment – separate from tax clinic
- 4. 1-to-1 benefits meeting tips**



# Referring to other resources

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- Tax filing clinics, ID clinics, community support or advocacy organizations
- [Benefits wayfinder “Help” section](#)
- [Benefits wayfinder Agency Portal](#)
- [Supporting client intake, triage, and referral](#) (Prosper Canada tip sheet)
- [Benefits Wayfinder Support Guide](#)

# New resources & offers

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- [Bridge to Benefits](#)
- [Making the most of your money](#) online course
- [The Canada Disability Benefit – Prosper Canada Learning Hub](#)
- [Dollars Seen Differently Podcast – Prosper Canada Learning Hub](#)

*Interested in integrating the Benefits  
Wayfinder into your work?*

Contact: Jenni Bolton  
[jbolton@prospercanada.org](mailto:jbolton@prospercanada.org)



# Online training: **Prices increasing!**

Take advantage of current pricing:

- [Financial literacy for Facilitators](#)
- [Financial Empowerment Foundations](#)
- [Foundations of Access to Benefits](#)

**Special limited time offer!**  
Free access to [Module 2 of the Financial Literacy for facilitators course](#)

**Fees increase  
for all courses  
on April 1!**



# Summary and conclusion

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# Summary

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- We 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.





# Thank you for attending this webinar

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Please take a moment to provide your feedback by completing a [survey](#).

The Benefits Wayfinder is developed by



Primary sponsor



Supported by



# Contact

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