Final Report

Income Assistance Program Information Technology Project

Preface & Acknowledgments

The First Nations Technology Council acknowledges that it is fortunate to live and work upon the unceded territories of the **xʷməθkwəy̓əm** (Musqueam), **Skwxwú7mesh** (Squamish), and **Səlílwətaʔ**/ Selilwitulh (TsleilWaututh) peoples.

The Technology Council is pleased to present its findings on the impact of technology on the roles of Band Social Development Workers across British Columbia as it relates to the current state of the on-reserve Income Assistance Program. Through our Indigenous Research Methodology, we have contextualized personal narratives, survey data, and have recommended areas for future investment to ensure Band Social Development Workers across B.C. feel supported in their work. Data collected during this project works to comply with the principles of OCAP which are ownership, control, access and possession.

We are grateful to all those who contributed to this report and recommendations, particularly the Band Social Development Workers across B.C., who shared their experiences and ideas through workshops, interviews, breakout activities and survey feedback.

The Technology Council would like to thank the BC Assembly of First Nations, Union of BC Indian Chiefs, First Nations Summit and the First Nations Leadership Council for supporting and endorsing this important work and Indigenous Services Canada for funding this project. We would also like to acknowledge the Project's Regional Coordinators who supported with outreach and survey dissemination within their region.

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Key Terms and Acronyms

BSDW · · · · · · · Band Social Development Worker

CRTC · · · · · · · Canadian Radio-television and Telecommunications Commission

DCI · · · · · · · Data Collection Instrument

FNSDS · · · · · · · First Nations Social Development Society

IA · · · · · · · Income Assistance

ISC · · · · · · · Indigenous Services Canada

SFNFCI · · · · · · · Saskatchewan First Nation Family & Community Institute

The terms Indigenous, First Nations, and Aboriginal are all used in this report.

Aboriginal

…is the terminology used in several Government of Canada publications, including Statistics Canada data, and is used in this report only when referring directly to these sources and their findings. Aboriginal is also the terminology used in the Constitution Act, 1982 to recognize and affirm rights.

First Nations

…are the original inhabitants of what is now known as British Columbia.

Indigenous

…is used inclusive of First Nations, Métis and Inuit peoples in Canada. It is also used when referring to several contemporary Government of Canada institutions, such as Indigenous Services Canada. The term Indigenous refers to the rights laid out in the United Nations Declaration of Rights of Indigenous Peoples.

Executive Summary

Objective

Throughout Canada, there exist markedly different social support systems for on-reserve and off-reserve communities. In the 203 First Nations in British Columbia, Band Social Development Workers (BSDWs) are responsible for administering Income Assistance (IA), often with high caseloads and reporting requirements. The application of technology is integral to the work that BSDWs perform, particularly with regard to reporting and client/case management. This study examines the impact of technology on BSDWs' roles and areas for improvement, foregrounding BSDW perspectives on the state of on-reserve IA.

Summary of Findings

Literature and Background

The federal government initiated the First Nations IA program in 1964. In the years following, on-reserve IA has seen jurisdictional differences in delivery, shifts such as the introduction and removal of the First Nations Social Development Society (FNSDS), policy reform with a focus on employability, and the increase in funding for individuals receiving IA as a result of the recent COVID-19 pandemic. While publicly available data pertaining to on-reserve IA is sparse, maximum allowable IA amounts on- and off-reserve differ by province, as do on-reserve IA dependency rates. While numerous studies have fruitfully evaluated the on-reserve IA system, this paper offers a new perspective by foregrounding BSDW narratives through in-person engagements (including five regional engagement sessions and ten report back workshops) and a province-wide BSDW survey (accounting for nearly 70% of First Nations in BC), along with key informant interviews with technology providers and Indigenous Services Canada personnel working in BC.

Understanding BSDW Demographics and Responsibilities in British Columbia

BSDWs in BC predominantly identify as women (90%) and First Nations (87%), and nearly two thirds of BSDWs (63%) are 46 years of age or older. The average age of a new BSDW (in their first six months on the job) is 44, and about a fifth of BSDWs taking the survey (21%) had held their role for less than a year. Many BSDWs (59%) in BC have completed some form of post-secondary education, such as a certificate, diploma, or post-secondary degree. A further quarter of respondents (23%) had graduated from highschool or received their GED, while 19% of respondents had some grade school.

BSDWs experience a significant range in caseload and workload, which varies seasonally and by community. Workload may also be impacted by BSDWs having to implement federal policy in their own communities (with about 65% of respondents working in the community that is their home). BSDWs often take on additional jobs, and may work part time with many other "hats," in part due to the relatively low wages associated with BSDW work (on-reserve). In addition, many BSDWs do not have support staff to allow them to take time off for training, illness, or holidays.

A significant part of BSDWs' roles is IA reporting. This is typically done through a quarterly Data Collection Instrument (DCI) to Indigenous Services Canada, with some variation depending on the community's funding structure or treaty. IA DCIs have recently undergone changes, with the 2019-2020 DCI having delayed implementation and a partial recall from the field. Different versions of the DCI require different amounts of data collection and entry from BSDWs. Overall, BSDWs are responsible for client intake, case notes, documentation and approvals, ongoing client support, cheque requests, safety procedures, internal reporting, and external (DCI) reporting. Ongoing client support may contain any number of additional responsibilities such as grocery runs, connecting clients with training, and supporting them through job searches.

Reporting and Technological Tools

On average, BSDWs responding to the survey spent 12.5 hours monthly compiling the data for DCIs. There is a significant range, from those who spend very little time (24% at one hour or less monthly) to those who spend 16 hours or more (also 24%). A variety of technological tools may help BSDWs save time on reporting and other tasks: these include hardware, software, and strong internet connectivity.

Internet connectivity also impacts BSDWs' work, and for those who ran speed tests at their workstations (55), 52.7% were below the Canadian Radio-television and Telecommunications Commission (CRTC) goal for all of Canada by 2030 (50/10 Mbps). In addition, 40% had tests below 50/10 Mbps for both download and upload speed.

Integrated software solutions with IA modules help BSDWs automate some of their data entry and reporting tasks. About one-third (32%) of BSDWs reported that they did not have access to an integrated software solution and were instead using Microsoft Excel and paper for their reporting. Access may be impacted by community size, with only 41% of smaller communities (200 residents or fewer) using integrated software as compared with 86% and 84% of medium (201-500) and large (501+) Nations, respectively. In an assessment of different integrated software solutions' pros and cons, BSDWs identified key priorities for a helpful solution: user experience, interoperability, case management, ease of export to DCI, elimination of data entry labour, ongoing and initial training and support, data storage, client privacy, and software speed. Many BSDWs felt that a single software solution for all of BC with fully interoperable client data would streamline their roles, while others maintained that choice of software was important and that different Nations had different needs.

Training and Networking

A lack of training was the single highest barrier BSDWs faced to completing their work, as identified in the BSDW survey and throughout many in-person engagements. The lack of an advocacy group was ranked as the second-highest barrier in the survey. Half of BSDWs (50.4%) reported that they had received one day or less of formal training before beginning their jobs. BSDWs identified several policy training topics they would like support in, as well as technology training, and they also made significant comments about the need for professional development for leadership skills, client support skills, and health and wellness. Preferred training formats varied, including requests for online, in-person, and in- and out of community workshops, suggesting that a diversity of training alternatives are needed in order to ensure accessibility. In addition, mentorship and support from peers was discussed as one of the main sources of informal training for BSDWs who had not had access to a formal onboarding process.

Barriers to Completing Work for BSDWs
FNTC BSDW Survey 2020, aggregate results

1	2	3	4
Lack of training	Lack of an advocacy group (e.g., former FNSDS)	DCI's	Reconciling the General Ledger and DCI

5	6	7	8	9
Lack of IT support	Integrated software (e.g., Xyntax, Paydirt)	Computer hardware old/slow	Slow internet	Basic computer software (e.g. Excel)

Data Collection, Respect, and Program Improvements

Many BSDWs commented on the link between data collection in on-reserve IA and respect: respect for them, their abilities, and their communities. Many BSDWs felt that there was a lack of transparency around the purpose of quarterly DCIs and a lack of trust in their work by the Federal government (reflected in disproportionate reporting burdens, lack of digitization, policy-oriented training rather than client-oriented training, etc.), and a level of oversight that seemed more designed to monitor their decisions than to collect data that could improve programs or services. Throughout the study, it became clear that software tools alone will not fix the problems that BSDWs encounter while administering on-reserve IA. A clear articulation of the goals of DCI data collection, in addition to an evaluation of the DCI program that consults BSDWs on data that would be useful to improve programs and services rather than to audit, would comprise a concrete step towards improving BSDWs roles, investing in IA clients, and providing on-reserve IA in a culturally respectful way.

Summary of Recommendations:

Among other key and detailed recommendations (please refer to page 48 for the recommendations in their full form) this report proposes the following investments for improving the roles of BSDWs and the IA program they work to administer through:

- *Consistent and comprehensive onboarding training for BSDWs.*

- *Funding for a BSDW-led association that can design and offer training, professional development, networking, and peer-to-peer workplace support.*

- *Changes to existing policy and compliance training methods and communications from ISC to BSDWs.*

- *Opportunities for BSDWs to report on IA shortfalls and challenges to ISC.*

- *An evaluation of DCI data collection needs in light of OCAP®[1] principles and removal of unnecessary data collection.*

- *Digitization of reporting requirements and revision of DCI forms for interoperability with reporting software solutions.*

- *Funding for nations who require an IA integrated software module, with the potential for an opt-in province-wide software or database.*

- *Funding for hardware tools, safety-related technology, and infrastructural needs for BSDWs.*

- *Investment in broadband connectivity infrastructure for rural, remote, and Indigenous communities across BC.*

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[1] OCAP® is a registered trademark of the First Nations Information Governance Centre (FNIGC). Read more at www.FNIGC.ca/OCAP.

Introduction

In British Columbia and many of Canada's provinces, there exist markedly different social support systems for on-reserve and off-reserve communities. In the 203 First Nations in British Columbia, Band Social Development Workers (BSDWs) are responsible for administering Income Assistance (IA), often with high caseloads and reporting requirements, and with significant variation in the tools and infrastructure available to them. This project has sought to understand the degree to which technology currently contributes to or detracts from BSDWs' roles, along with areas for improvement and investment, and it has conducted extensive primary research, data validation, and other engagement with BSDWs in order to do so in a way that understands and respects community-based visions of social assistance.

The First Nations Technology Council is an Indigenous-led organization that serves all 203 First Nations communities across British Columbia. With mandates from the First Nations Summit, Union of BC Indian Chiefs and BC Assembly of First Nations, the Technology Council works to ensure that Indigenous peoples have full and equitable access to the tools, training and support to maximize the opportunities presented by technology and innovation. With over a decade of building and fostering strong community partnerships combined with a network of technology futurists and social change-makers, the Technology Council is well-positioned to lead this research in partnership with the Information and Communications Technology Council.

While this study takes its lead from primary research and the experiences of BSDWs currently working to administer on-reserve IA, it will begin by contextualizing the on-reserve IA program through the lens of secondary literature. In recent years, there have been a number of program evaluations of on-reserve IA. These include the 2007 Evaluation of the Income Assistance Program, the 2016 Joint Evaluation of the On-Reserve Income Assistance Reform, and the 2018 Evaluation of the On-Reserve Income Assistance Program. The following section discusses some key points from these evaluations, in conjunction with academic and "grey" (unpublished, such as non-academic reports) literature, as well as First Nations and First Nations organizations websites and publications.

IA Program: Background

Indigenous Services Canada (ISC) funds an IA program designed to cover the basic needs (such as food and shelter) of individuals living on-reserve in Canada. IA is provided in the form of a monthly payment. Program guidelines highlight three expected outcomes of on-reserve IA[2]:

- Men, women, and children have access to supports to meet their basic and special needs;
- Men and women have access to supports that help them to transition to and remain in the workforce;
- Men and women are employable and able to become or remain attached to the workforce.

Management of on-reserve IA is the jurisdiction of the federal government (except for in Ontario), but regional ISC offices house federal ISC staff (for example, federal employees responsible for British Columbia are in a local office)[3]. Delivery of IA, however, is the domain of First Nations or First Nations organizations[4] – which receive funding from the federal government.[5] In British Columbia, on-reserve IA is delivered by BSDWs, who are usually employed by bands on each reserve, or by tribal councils or other Aboriginal organizations.[6]

While the IA funded by ISC is provided only to qualifying individuals living on-reserve, other IA programs are provided to Indigenous and non-Indigenous people throughout Canada. Off-reserve, IA is administered by provincial governments rather than the federal government. At the same time, on-reserve IA parallels Canadian off-reserve IA in that both are forms of welfare designed to cover basic needs, and because on-reserve IA rates are based on provincial IA rates.[7]

History and Recent Developments

The federal government's First Nations IA program began in 1964[8], amid the refusal of the provinces (except for Ontario) to provide social assistance to First Nations.[9] IA has undergone numerous changes since. In the 1980s, First Nations authorities, rather than the federal government, began to administer on-reserve IA.[10] In 2004, the First Nations Social Development Society (FNSDS) began to assist with IA in BC, and to represent BSDWs. It did so until September 2015, when the Canadian Government removed funding for the society.[11, 12]

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[2] Indigenous Services Canada, "Income Assistance National Program Guidelines 2019 to 2020", n.d. https://www.sac-isc.gc.ca/eng/1565185888233/1565187157281

[3] Martin Papillon, "Playing Catch-up with Ghosts: Income Assistance for First Nations on Reserve", in Welfare Reform in Canada: Provincial Social Assistance in Comparative Perspective, ed. Daniel Béland and Pierre-Marc Daigneault, 5-6.
"Nonetheless, the Canadian government reimburses Ontario for approximately 95% of its on-reserve social assistance expenditures."

[4] Indigenous Services Canada, "Overview of Indigenous Services Canada policy and program initiatives concerning Family and Child Welfare – Family Supports and Domestic Violence," 2018. https://www.mmiwg-ffada.ca/wp-content/uploads/2019/05/MMIWG-ISC-CFS-Overview.pdf

[5] Indigenous Services Canada, "Income Assistance National Program Guidelines 2019 to 2020", n.d. "Program guidelines permit delivery of IA by the following groups: chiefs and councils of First Nations bands that are recognized by the Government of Canada, tribal councils, the provinces, Indigenous communities and organizations, and political or treaty organizations."

[6] Jay Istvanffy and Barbara Johnston, "Income Assistance on Reserve in British Columbia", BC Legal Services Society 2017. https://pubsdb.lss.bc.ca/pdfs/pubs/Income-Assistance-on-Reserve-in-British-Columbia-eng.pdf

[7] Indigenous Services Canada, "Overview of Indigenous Services Canada policy and program initiatives concerning Family and Child Welfare – Family Supports and Domestic Violence", 2018.

[8] Indigenous Services Canada, "Income Key Facts", 2014. https://www.sac-isc.gc.ca/eng/1369766807521/1533307648913

[9] Hugh Shewell and Annabella Spagnut, "The First Nations of Canada: social welfare and the quest for self-government", in Social Welfare with Indigenous Peoples, ed. John Dixon and Robert Scheurell, p.22-23.

[10] Indian and Northern Affairs Canada, "Evaluation of the Income Assistance Program", 2007. https://www.rcaanc-cirnac.gc.ca/DAM/DAM-CIRNAC-RCAANC/DAM-AEV/STAGING/texte-text/eiap07_1100100011749_eng.pdf

[11] Jody Kaden, Letter to Band Social Development Workers, BC, 2015. http://www.bcands.bc.ca/wp-content/uploads/AANDC-May-22nd-Letter-to-Band-Social-Development-Workers.pdf

[12] Union of BC Indian Chiefs, "Federal Government's Unilateral Removal of Funding from First Nations Social Development Society Denounced", 2015. https://www.ubcic.bc.ca/fedfunding_fnsds

A 4-year Income Assistance Reform Initiative was announced by the Canadian Government in 2013, with an objective of ensuring more "active measures"[13]: developing a stronger focus on recipients' employability and job readiness. The primary components of this reform were: 1) "Enhanced Service Delivery" – a case management approach that attempted to support the employment of IA clients, and entailed targeted funding to provide "pre-employment" services for youth, and 2) a second employment support program – the First Nations Job Fund.[14] Enhanced Service Delivery was administered by Indigenous and Northern Affairs Canada (which is now ISC), while the First Nations Job Fund was administered by Employment and Social Development Canada (ESDC). Both programs ended in March 2017, although they were extended for a year.[15]

The 2018 federal government budget added $78.4 million towards the IA pre-employment programs. It also included funding of $8.5 million towards First Nations-led engagement, in an effort to improve the program[16] that entailed face-to-face meetings, community visits, and engagement with other stakeholders.[17] In response to COVID-19, the Government of Canada provided an additional $270 million to the on-reserve IA program, both as direct support for individuals receiving IA, and to hire additional administrative staff.[18] As a response to COVID-19 in BC, a monthly increase of $300 for individuals receiving IA was matched by the federal government.[19]

Program Data

Despite detailed reporting requirements, there is limited public data regarding on-reserve IA recipients. As of 2018, 540 First Nations delivered IA to approximately 83,000 clients and a further 69,000 beneficiaries (dependents of clients).[20] The number of participating First Nations has remained steady: 536 participated in 2005-06, while 550 participated in 2012-13.[21] Total IA spending by the Canadian Government was $923.9 million in 2016-17, having risen from 682.5 million in 2005-06,[22] due in large part to the rapidly growing populations on reserves.[23]

The amount of IA that an individual receives each month depends on their family size, relationship status, age, whether they are able to work, and if they have a disability.[24] Recipients must demonstrate financial need as well as prove that they reside on-reserve, and must also complete an application form. In 2013, average IA benefits amounted to $600 per month for an individual with no dependents.[25] The maximum allowable IA amounts for Canadian Provinces and for on-reserve IA in BC are detailed in the table below:

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[13] Indigenous and Northern Affairs Canada, "Joint Evaluation of the On-Reserve Income Assistance Reform", 2016. https://www.rcaanc-cirnac.gc.ca/DAM/DAM-CIRNAC-RCAANC/DAM-AEV/STAGING/texte-text/ev_jeonia_1498147558131_eng.pdf, p. iv.

[14] Employment and Social Development Canada, "Report 6 – Employment Training for Indigenous People", 2018. https://www.oag-bvg.gc.ca/internet/English/parl_oag_201805_06_e_43038.html

[15] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018. https://www.sac-isc.gc.ca/DAM/DAM-ISC-SAC/DAM-AEV/STAGING/texte-text/ev_oria_1557320422981_eng.pdf, p.4.

[16] Indigenous Services Canada, "Overview of Indigenous Services Canada policy and program initiatives concerning Family and Child Welfare – Family Supports and Domestic Violence", 2018.

[17] Indigenous Services Canada, "On-Reserve Income Assistance Program: First Nations-led engagement 2018", 2018. https://www.sac-isc.gc.ca/eng/1540326641885/1540326683647

[18] Indigenous Services Canada, "On-reserve Income Assistance Program", 2020. https://www.sac-isc.gc.ca/eng/1100100035256/1533307528663

[19] Chantelle Bellrichard, "B.C. First Nations say Ottawa will match province's $300 social assistance supplement on reserves", CBC News, 2020. https://www.cbc.ca/news/indigenous/bc-first-Nations-income-assistance-supplement-1.5528378

[20] Employment and Social Development Canada, "Report 6 – Employment Training for Indigenous People", 2018, p. 5.

[21] Indian and Northern Affairs Canada, "Evaluation of the Income Assistance Program", 2007.

[22] Employment and Social Development Canada, "Report 6 – Employment Training for Indigenous People", 2018, p. 6

[23] Idem, 31.

[24] Jay Istvanffy and Barbara Johnston, "Income Assistance on Reserve in British Columbia", BC Legal Services Society 2017, p.18.

[25] Indigenous and Northern Affairs Canada, "Joint Evaluation of the On-Reserve Income Assistance Reform", 2016, p.2.

Maximum annual welfare incomes in each province (in 2018)

	Single person considered employable	Single person with a disability	Single parent, one child	Couple, two children
British Columbia	**$9,042**	**$14,802**	**$20,782**	**$27,006**
Off-reserve Canadian average	**$9,144**	**$12,043**	**$20,952**	**$29,388**
On-reserve[26], British Columbia	**$9,144**	**$11,777.04**	**$11,347**	**$13,212**

Figure 1: Adapted from:
https://maytree.com/welfare-in-canada/canada/#:~:text=In%20all%20other%20provinces%2C%20welfare,was%20third%20highest%20at%20%2413%2C651.

While BC's on-reserve IA dependency rates[27] are, on average, among the lowest in Canada, they remain (as of 2015-2016) nearly five times that of BC's off-reserve IA dependency rates. For context, approximately 40.1% of the 270,000 people with Aboriginal identity (the term Aboriginal here reflects the language used by Statistics Canada) in BC live on reserves, and 5.9% of BC's population identifies as Aboriginal.[28]
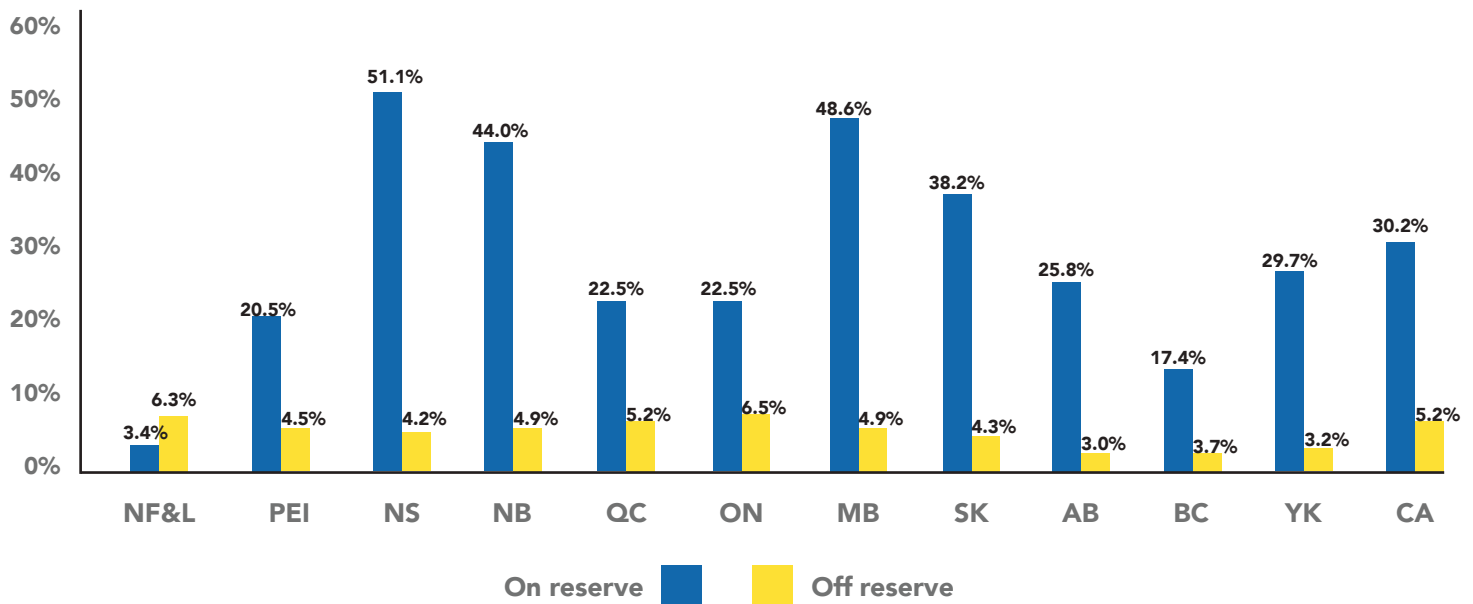
Figure 2:
Income Assistance and Provincial Social Assistance Dependency Rates: Comparison of Provinces/Yukon Territory (2015-2016). Source: https://www.sac-isc.gc.ca/DAM/DAM-ISC-SAC/DAM-AEV/STAGING/texte-text/ev_oria_1557320422981_eng.pdf

[26] *BC values are based on 2017 IA rates, outlined here: https://pubsdb.lss.bc.ca/pdfs/pubs/Income-Assistance-on-Reserve-in-British-Columbia-eng.pdf

[27] Where "dependency rate" for on-reserve reporting is calculated using IA quarterly average caseload. However, the data source is not clear whether the number of IA recipients is being compared with the overall population on-reserve, the working-age population, etc. https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?Lang=Eng&GK=PR&GC=59&TOPIC=9

[28] Statistics Canada. "Focus on Geography Series, 2016 Census: Aboriginal peoples", 2016. https://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-pr-eng.cfm?Lang=Eng&GK=PR&GC=59&TOPIC=9

Single men are the most common recipients of IA among individuals 18-24. Nearly half as many single women in the same age category received IA. However, 17.8% of single women with children received IA, compared to only 2.1% of single men with children. Only 7.3% of couples received IA.

Table 2 - Family Status of Income Assistance Recipients, Aged 18 - 24 (2013 - 2014)

Single Male	Single Female	Single Male Parent	Single Female Parent	Male in a Couple	Female in a Couple	Male Parent in a Couple	Female Parent in a Couple
12,412	6,713	563	4,549	295	215	614	753
48.6%	24.2%	2.1%	17.8%	1.2%	0.8%	2.4%	2.9%

Figure 3: Family Status of Income Assistance Recipients, Aged 18 to 24 (2013-2014). Source: https://www.rcaanc-cirnac.gc.ca/DAM/DAM-CIRNAC-RCAANC/DAM-AEV/STAGING/texte-text/ev_jeonia_1498147558131_eng.pdf

IA is not the same as employment insurance, and it is not required that recipients are unemployed in order to receive it. Nonetheless, the correlation between unemployment and financial hardship is clear, and helps to explain the discrepancy between IA rates on- and off-reserve. In 2019, the unemployment rate for Canada's non-Indigenous population was 5.5%, compared to 10.1% for the Indigenous population living in Canada[29] Canadian Labour Force Surveys do not include responses from First Nations people living on reserve, meaning that up-to-date Canadian government statistics regarding First Nations employment is limited. The First Nations Information Governance Centre has some publicly available employment data of First Nations living on-reserve, but no publicly available data regarding IA. Pictured below, for additional reference, are employment rates based on region and First Nations status, from the 2016 census:

Employment Rates by Region (2016)
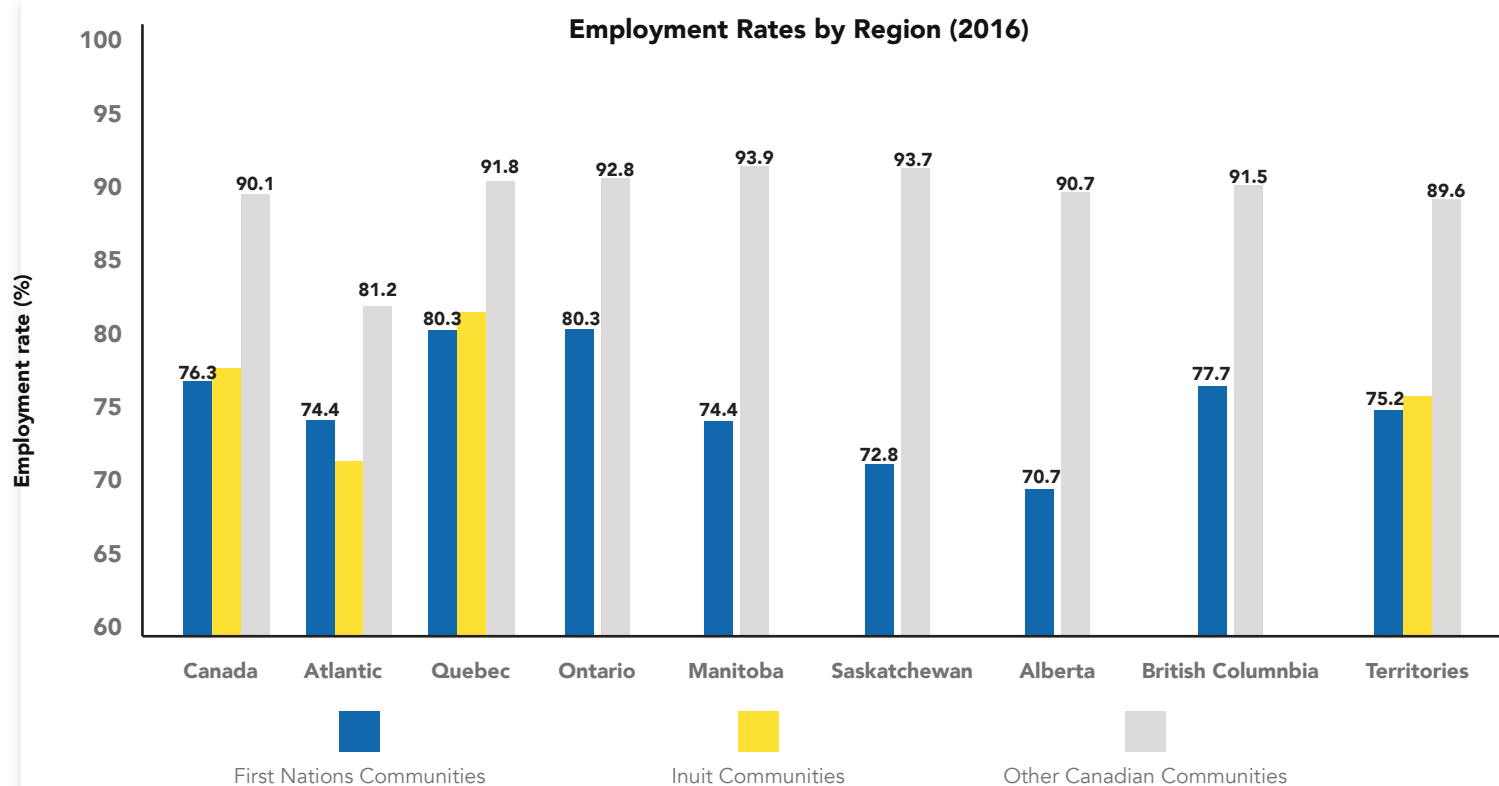
*Figure 4:*
Employment Rates in Canada Compared, adapted from 2016 Census data.

[29] Statistics Canada, "Labour force characteristics by region and detailed Aboriginal group", 2020. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410036501

Different Nations, Different Delivery

While participating First Nations all receive funding from the Government of Canada, IA delivery and administration practices may differ Nation-to-Nation and province-to-province. For example, only in BC are those who administer IA on-reserve referred to as BSDWs. Differing circumstances among bands can also influence delivery. Varying band finance or funding, technological assets, client load, and administration can all play a role in the process and outcomes of IA delivery. Caseloads, roles, and responsibilities may vary significantly for BSDWs in different Nations. Further, BSDWs report to different band departments depending on the band for which they work. For example, BSDWs work for the Health and Social Development department at the Okanagan Indian Band, and at the Health and Wellness department at the Adams Lake Indian Band. Elsewhere, six Manitoba First Nations receive IA delivered by the Social Development Program of the Interlake Reserves Tribal Council.[30] In a survey[31] by the Saskatchewan First Nation Family & Community Institute (SFNFCI), IA workers noted that they collaborate regularly with band housing and finance departments.

Band Departments who work most with IA
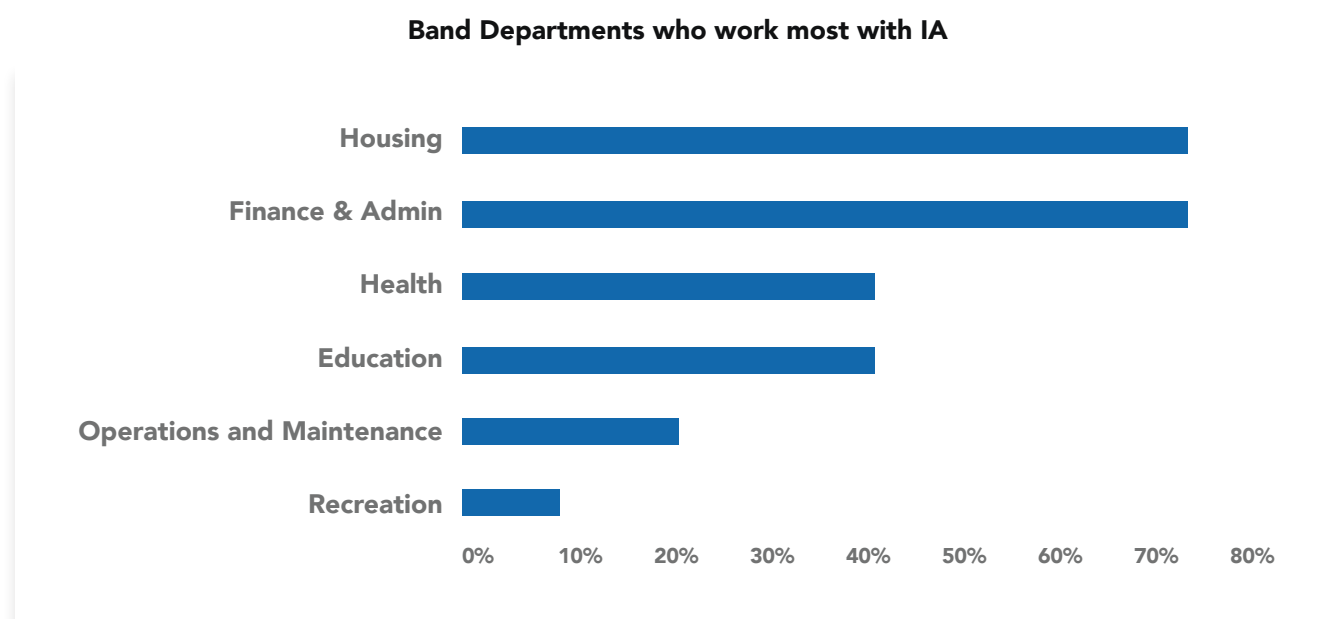
Figure 5: Source:
http://www.sfnfci.ca/ckfinder/userfiles/files/SFNFCI_May19_IncomeAssistanceProgramReformReport_Print.pdf ; Adapted from: https://www.sac-isc.gc.ca/SAC-ISC/CWB/index-graphs-en.html

Existing Analyses of the On-Reserve IA System

When analyzing First Nations employment data and IA delivery, it is important to acknowledge the influence of prejudice, racism, and colonization. For example, one 2013 study found that support for IA was lower among survey respondents when IA recipients were portrayed as Aboriginal, compared to when IA recipients were portrayed as white.[32]

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[30] Interlakes Reserve Tribal Council, "Social Development Program", 2018. https://www.irtc.ca/social-development-program/

[31] Data regarding delivery differences between jurisdictions and Nations is limited, yet the SFNFCI report consists of a number of survey questions regarding IA delivery.

[32] Allison Harell, Stuart Soroka, Kiera Ladner, "Public Opinion, Prejudice and the Racialization of Welfare in Canada", 2012. https://www.cpsa-acsp.ca/papers-2012/Harell-Soroka-Ladner.pdf

The IA system faces a high degree of intergovernmental complexity, given that on-reserve IA rates are related to provincial rates, yet administered by the federal government and delivered by First Nations. Martin Papillon, Director of the Centre de recherche sur les politiques et le développement social (CPDS) writes that the hybrid service provision is "a highly fragmented policy regime,"[33] and that First Nations "face a certain disconnect as they navigate between the limited flexibility of federal funding and evolving provincial objectives."[34] In Native People and the Social Work Profession, Barbara Waterfall writes of the complexity of social services being delivered by First Nations yet administered by external governments. She suggests that the creation of such delivery roles creates an upper-middle class that benefits from its position, making BSDWs and similar administrators "unlikely to develop a critique of the colonial power relations that are embedded within this new neo-colonial schema."[35] Papillon writes that First Nations income support was initially "explicitly designed… as a tool of cultural and economic assimilation,"[36] noting that in comparison to traditional welfare, First Nations IA is "also rooted in more complex, and controversial, policy logic associated with Canada's colonial past,"[37] and criticizes the prevalence of framing social assistance for First Nations as a "social investment."[38]

In 2005, Melanie MacKinnon wrote that some First Nations "express concern about delivering services under the rules of policy and mandate unilaterally decided by the federal government. This practice perpetuates the subordinate role of First Nations as service providers, and does not encourage or invite First Nations to joint decision- or policy- making exercises."[39] Similarly, a review of the IA program by Indigenous Services Canada in 2018 reported that although the program remains "highly relevant to the objectives of the Department and the Government of Canada,"[40] it is in need of improvement and requires collaboration with First Nations. The Assembly of First Nations notes that there are "persistent gaps between income assistance programs and real needs in First Nations,"[41] citing a need for IA that is buoyed by First Nations-driven approaches.

While numerous studies have conducted fruitful evaluations of the on-reserve IA system, the literature lacks a comprehensive analysis of the technologies used by BSDWs in BC and potential improvements/investments via technology. To this end, this study conducted five in-person engagements with BSDWs to learn about their use of and needs for technology, as well as an extensive BSDW survey and several key informant interviews with relevant software providers and ISC personnel. In the sections that follow, this paper will carry forward the analyses of the on-reserve IA program conducted thus far with a discussion of who BSDWs in BC are, their roles, and their tools. It will then outline the short, medium, and long-term needs for an investment strategy that will improve both BSDW roles and the on-reserve IA system by helping BSDWs to spend less time on administration and more time supporting their clients.

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[33] Papillon, "Playing Catch-up with Ghosts: Income Assistance for First Nations on Reserve", p. 2

[34] Ibid.

[35] Barbara Waterfall, "Native People and the Social Work Profession: A Critical Exploration of Colonizing Problematics and the Development of Decolonized Thought", Journal of Educational Thought, 2002. https://www.jstor.org/stable/pdf/23767599.pdf?ab_segments=0%252Fbasic_SYC-5187%252Ftest&refreqid=excelsior%3A02a5d53e9e5ed389790ab63c5049e434, p. 153.

[36] Papillon, "Playing Catch-up with Ghosts: Income Assistance for First Nations on Reserve", p. 2

[37] Ibid.

[38] Idem, 4.

[39] Melanie MacKinnon, "A First Nations Voice in the Present Creates Healing in the Future", Canadian Journal of Public Health, 2005. "https://www.jstor.org/stable/pdf/41994443.pdf?ab_segments=0%252Fbasic_SYC-5187%252Ftest&refreqid=excelsior%3Ad8d2b18e3e0bd9a4798ed9a492ff4f8e, p. S15.

[40] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018, p.ii.

[41] Assembly of First Nations, "Income Assistance", n.d. https://www.afn.ca/policy-sectors/social-secretariat/income-assistance/

Understanding BSDWs in the On-Reserve IA Program in BC

In addition to five in-depth regional engagement sessions with BSDWs, this study conducted a survey of BSDWs to understand who they are, what their experiences have been like, and what their needs are. The survey was delivered to all 203 Nations in British Columbia through a combination of regional session delivery, email outreach, and phone outreach, with a response rate of 68.5% (139 Nations).[42] For further methodological details, please consult Appendix I.

The following section is drawn primarily from the FNTC Survey of Band Social Development Workers (2019-2020), informed by qualitative findings from the engagement sessions

Who are BSDWs in BC?

As in other areas of the social work profession, the vast majority of BSDWs are women. In this study's BSDW survey, 90% of respondents identified as women, 7% as men, and 1.5% as non-binary (1.5% preferred not to specify). In addition, 63% of BSDWs responding to the survey were 46 years of age or older. In comparison, about 83% of off-reserve social workers in British Columbia are women,[43] while only 51% are 45 or older.[44]

Age of BSDW's in BC

Figure 6:
Most BSDWs in BC are 46 or older (BC BSDW Survey 2020, n = 153).
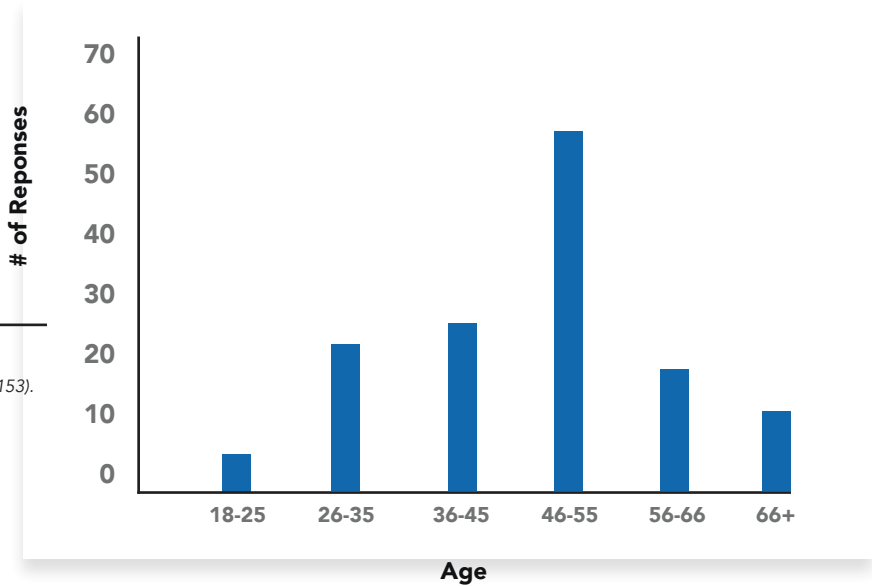
In addition, the vast majority of BSDW respondents (87%) identified as First Nations. Other responses included 8% non-Indigenous and 2% Métis, with the remainder of respondents preferring not to specify or to self-describe.

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[42] Note: each figure from the BSDW survey in this report includes n of respondents in its caption. Responses were cleaned for duplicates and invalid responses, but partial completions were retained.

[43] According to 2016 Census data, there were 6,285 persons employed total in NOC 4152, Social Workers in British Columbia, 5,210 of which were female. See: Statistics Canada, Data tables, 2016 Census, Catalogue No. 98-400-X2016295, released November 29, 2016.

[44] Ibid. Note that the BSDW survey asked for ages 46+, while Statistics Canada's census data was 45+, for data that is not directly comparable.

About a fifth of BSDWs (21%) had been in their role for a year or less while taking the survey, while another fifth (20%) had been BSDWs for one to three years. Figure 7 also demonstrates that the average age of BSDWs increases with length of time in role: nevertheless, the average age of new BSDWs is 44, a finding that has relevance for the design and dissemination of onboarding training (to be discussed later in this report).

Time in Role (no. of respondents) by Mean age (in years)
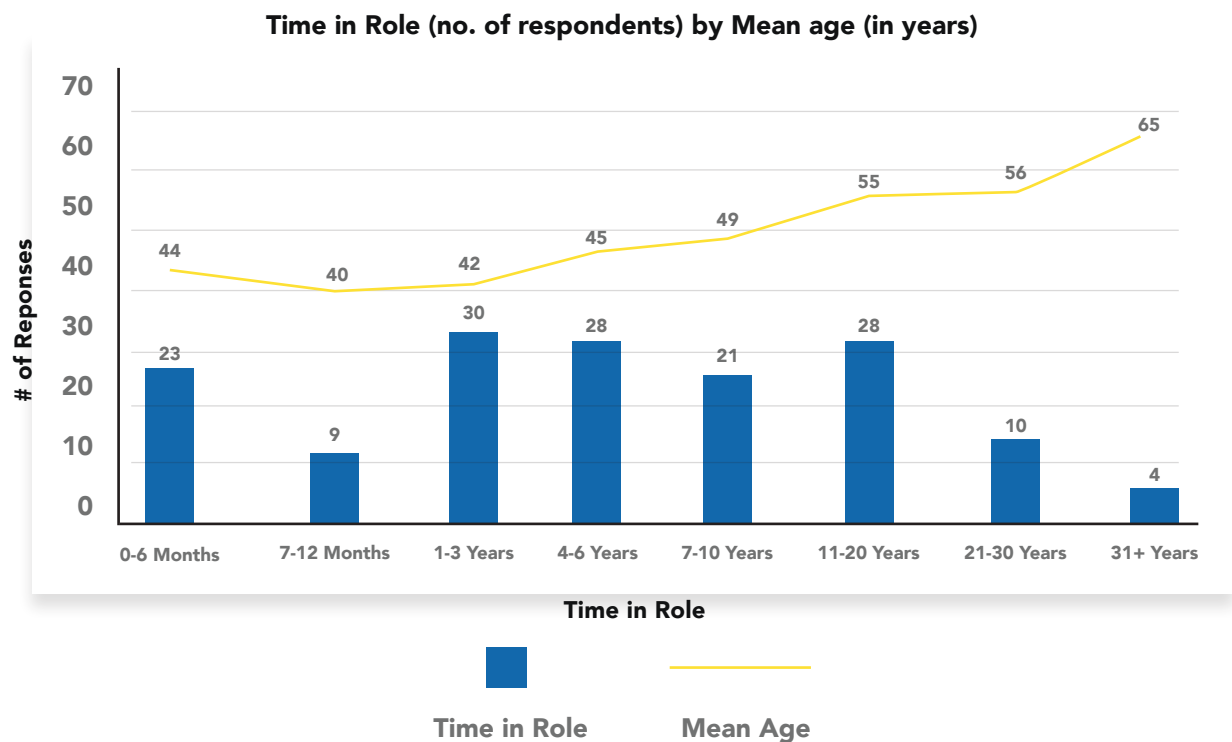
Figure 7:
Length of time in BSDW role (BC BSDW Survey 2020, n = 153)

Many BSDWs (59%) in BC have completed some form of post-secondary education, such as a certificate, diploma, or post-secondary degree. A further quarter of respondents (23%) had graduated from high school or received their GED, while 19% of respondents had some grade school. Of those who pursued post-secondary studies, a wide variety of fields and disciplines were represented, including Social Work (28% of all BSDWs with post-secondary studies), Indigenous Studies or First Nations Languages (12%), Accounting and Finance (12%), Business Administration (9%), Education (9%), and then a wide variety of other types of studies, including Mental Health and Counselling, Human Services, Sociology, Criminology, Public Administration, and the Arts.

Highest level of Education completed
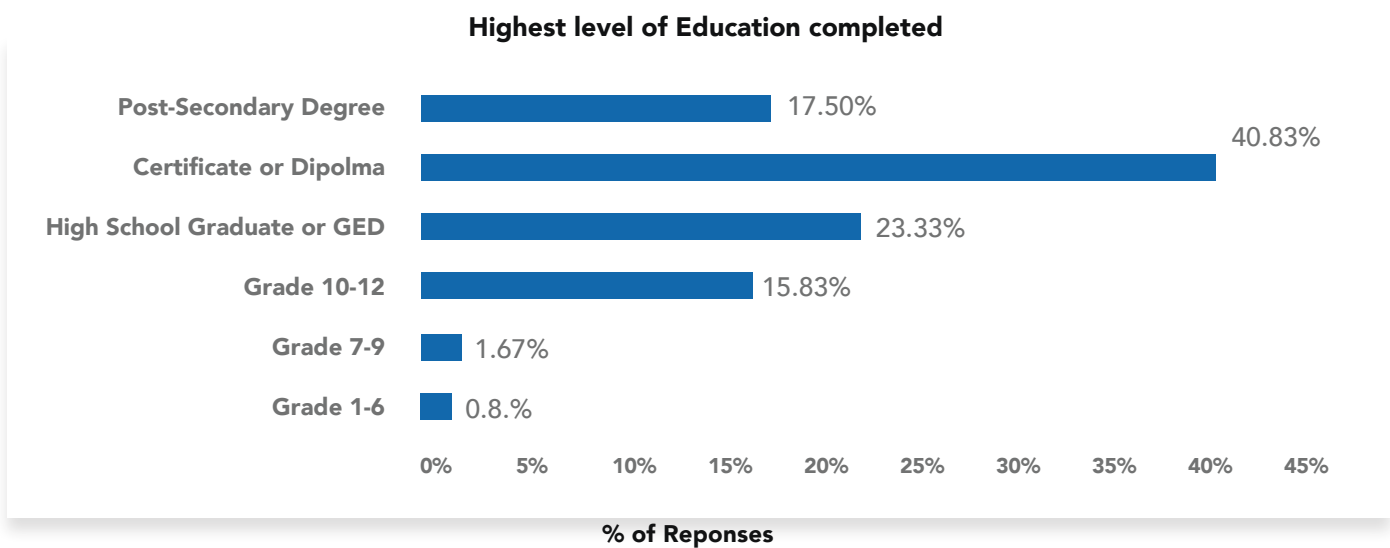
Figure 8:
Highest Level of Education Completed (BC BSDW Survey 2020, n = 120).

17

What are BSDWs Responsible For?

There is a significant range in the workload of different BSDWs. For example, caseload and number of clients had significant variation for survey responses, with 60% of BSDWs listing 50 or fewer clients, and the remaining 40% with 51 or higher.

How many Income Assistance Clients do you serve?	Respondent Count
1-10	9
11-50	58
51-100	24
101-150	15
151+	5

Figure 9:
BSDW Caseloads in BC, BSDW Survey 2020. Note: question requested numerical response. Accordingly, responses such as "several" are not represented in this table. (BC BSDW Survey 2020).

Caseload Not an Adequate Measurement of Workload

BSDWs at regional sessions emphasized that caseload did not necessarily reflect workload. They noted that each "client" could come with any given number of dependents not reflected in client number who also required significant support and documentation. Furthermore, different clients required many different types of support, and clients struggling with mental health or physical ability might require a lot more of a BSDW's time (for example, one BSDW described doing regular shopping runs for clients with impaired mobility). Finally, seasonal variations were significant: many BSDWs reporting a huge shift in caseload from summer to winter, reflecting equivalent shifts in local employment opportunities.

Many BSDWs noted that the magnitude of their workload was increased by their role within their own community, and the sometimes awkwardness of having to implement federal policy with friends and family. In all, 65.2% of those who responded to the BSDW survey said that the community in which they work is also their home.

> *"We are dealing with the community we have to live in."*
> *– BSDW, Prince Rupert Regional Engagement Session*

Is the community where you work also your home?

Figure 10 :
BSDWs from the community they work in,(BC BSDW Survey 2020, n =120)
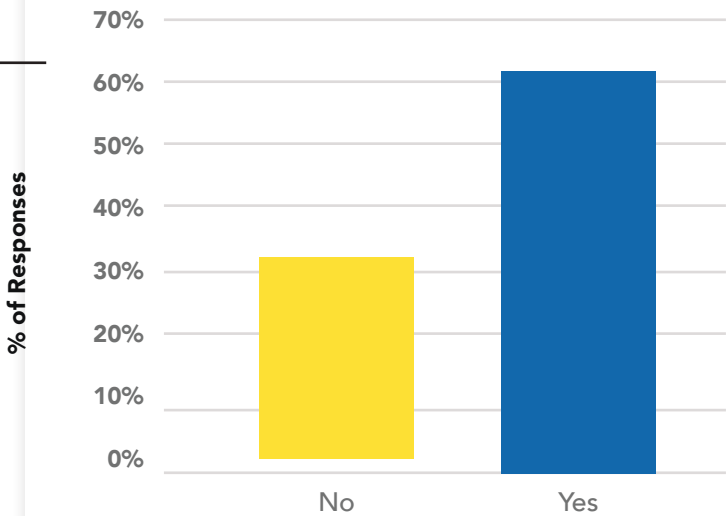
BSDWs Often Take on Additional Jobs

It is also important to note that many BSDWs work part time and "wear many hats" within their communities. One engagement session participant commented that her hourly pay worked out to an amount well below minimum wage, such that she had to take on several other jobs to support herself. By comparison, salaries for BC government employees that administer IA range from $30.10 to $40.70 per hour.[45] At the Vancouver regional engagement session, participants placed an emphasis on funding for salaries comparable to the wages of provincial employees who administer IA off-reserve: in the investment strategy activity (see Appendix I), BSDWs left notes such as "funding for comparable wages as province," "comparable funding, resources, and program services as off reserve."

> *"Bands aren't provided with adequate funding – it works out to $13/h full time, under minimum wage. So people end up being asked to do multiple jobs because they need further funding for their wages. They also give you an incorrect amount based on bad census calculations."*
> *– Vancouver Regional Engagement Session*

Furthermore, in the Kelowna regional session, one BSDW noted that due to her multiple roles in the community she had to be trained on more than one integrated software module (e.g., for Membership or Education in addition to IA) and found it quite challenging to switch between them, a comment relevant to training needs. BSDWs' desire for more training (discussed in detail in a subsequent section) may be linked to the reality of having more than one job to do in condensed timelines.

Most BSDWs work alone, some have assistants or secretarial staff that help them, while others interact frequently with finance staff, administrative staff, and council members. BSDWs who did not have administrative or support staff noted that it would be very helpful to have "an intake worker," "trained administrative staff," or simply "a second person to help" (comments from BSDWs at Prince George Regional Engagement Session). This issue also impacted BSDWs' ability to take any kind of holiday or even a training workshop—they noted that if there was no-one to fill in for them, they could not leave their desks.

Understanding IA Reporting Requirements and Data Collection Instruments (DCIs)

Indigenous Services Canada (ISC) requires that Data Collection Instruments (DCIs) are completed by BSDWs in order for their band to receive IA funding. For most bands, DCIs are quarterly reports designed to capture sociodemographic information and other program data.

The DCI required by ISC is dependent on the format of the funding mechanisms that each First Nation has. Most First Nations in British Columbia report directly to ISC on a quarterly basis, but two unique funding mechanisms alter this arrangement: 10-year grants or block funding. In addition, Nations may have modern treaty arrangements.

- The "New Fiscal Relationship" 10-year grant provides a decade-long funding term, meaning that First Nations have more flexibility in the use and delivery of services and funds such as IA, as well as lessened administrative and reporting requirements. ISC determines if a First Nation government is eligible for the 10-year grant, and the DCI for this program is annual (DCI #33315098, 2020/2021).[46]

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[45] British Columbia, "Salary Look-up Tool: Community Program Officer – Income Assistance" https://www2.gov.bc.ca/gov/content/careers-myhr/all-employees/pay-benefits/salaries/salarylookuptool/tma/cpo

[46] Indigenous Services Canada, "New Fiscal Relationship (NFR) Grant Results Report," https://www.sac-isc.gc.ca/DAM/DAM-ISC-SAC/DAM-TRNSPRCY/STAGING/texte-text/dci-2020-20201-33315098-ins_1585050068308_eng.pdf

• First Nations may also receive block funding, which typically consists of a five-year term, less funding flexibility, and more significant reporting and administrative requirements than those of the 10-year grant.[47] In block funding arrangements where a group of small Nations does aggregate reporting, local BSDWs submit monthly reports to a central representative who submits a quarterly DCI for all communities in the region.

• Importantly, Nations with "modern treaties" or Self-Government treaties, such as the Nisga'a Nation in BC, have different funding and reporting arrangements. While these Nations' systems are, for the most part, outside of the scope of this study, the research team spoke with members of a treaty Nation who commented that they mirrored provincial and federal reporting processes for their social assistance staff.

DCIs have undergone a number of changes in recent years, including the (currently delayed) implementation of a new income assistance DCI for 2019-20 (quarterly).[48] Excepting treaty Nations with their own or different arrangements (such as the Nisga'a Nation), three reporting standards are currently in use, each with different requirements: 10-year grant reporting (annual), a 2018-19 DCI (quarterly), and the delayed 2019-20 DCI (also quarterly).

Figure 11 below breaks down the number of BSDWs using each of these tools. At the time of completing the BSDW survey, which ran from late November 2019 to August 2020, about three of five respondents (58%) were using the 2018/2019 quarterly DCI. The final two-fifths of respondents were split between using the 10-year Grant DCI and the 2019/2020 quarterly DCI, which had been partially recalled (23% and 19%,). During the research team's report back and data validation sessions (see "What We Heard Sessions" in Appendix I), a BSDW commented that there is a new 2020/2021 DCI that is more similar to the 2018/2019 version, the DCI #455897A. However, this form was not in use during the survey's dissemination.

DCI used for reporting
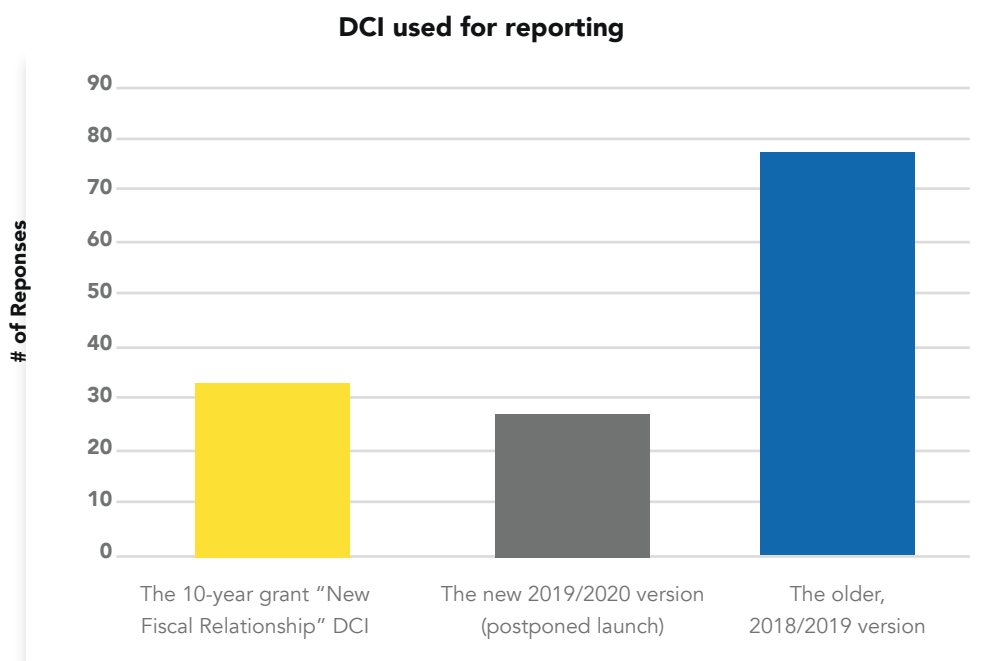
Figure 11:
DCIs used for reporting, (BC BSDW Survey 2020, n =140). At the time of survey dissemiNation, these were the only forms being used by respondents, though there were several N/A responses as a result of other arrangements (e.g., Nations with modern treaties with different stipulations).

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[47] Indigenous Services Canada, "10 year grant", 2019. https://www.sac-isc.gc.ca/eng/1527080791657/1527080813525

[48] Indigenous Services Canada, "The Reporting Guide", 2020. https://www.sac-isc.gc.ca/eng/1573764124180/1573764143080

The Context of Reporting: BSDW Process Mapping Activity

To better understand BSDWs' workloads from a qualitative perspective, each regional session held an activity where BSDWs mapped out their workflows from client intake to reporting. In this "process mapping" activity, BSDWs took turns interviewing each-other and writing down their workflow. Participants then "coded" each step in their workflow with tags: Technology (T) Pain Point (P) Bottleneck or Delay (B/D) and, in some of the sessions, Helpful (H) or Reporting (R).
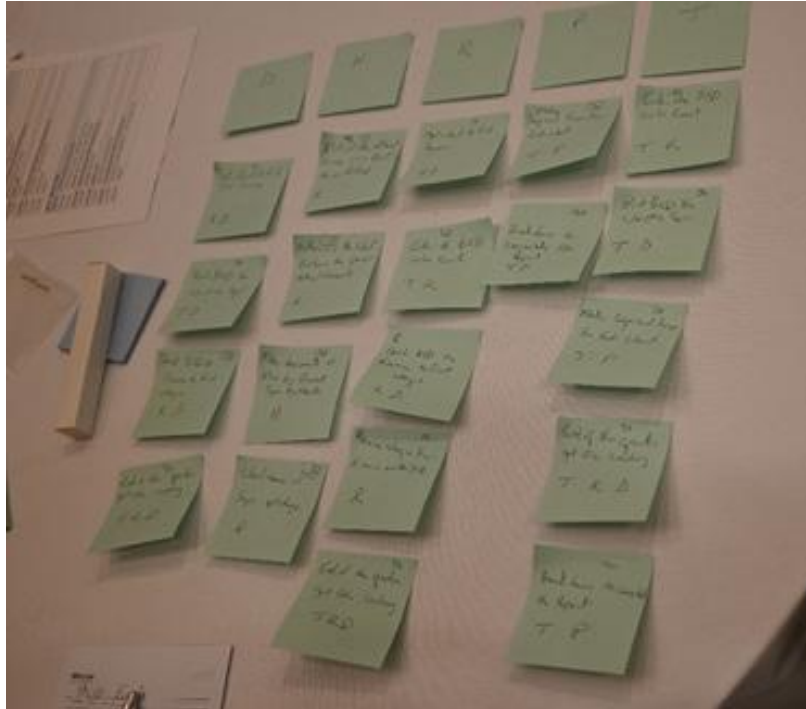
Figure 12:
A BSDW maps out and then categorizes their partner's process from intake to reporting for each client, step by step. Image of "Process Mapping" Activity from Vancouver Regional Engagement Session.

In order to make a meaningful summary of participant workflow, the study team came up with 8 steps that use broad categories to summarize the huge workflows described by BSDWs during sessions.

Workflow Step 1: Client Intake and Appointment

Clients make an intake appointment by phone or walking in, and BSDWs may or may not have receptionist/clerk support for booking. The client is required to have 2 pieces of ID, and if they do not have ID they need to get a card and be reimbursed. The BSDW and client go over rights and responsibilities, the client fills in an application package and is asked to go collect pertinent documentation. Some BSDWs prefer to do this step with pen and paper so that their client doesn't feel distanced by a computer screen, others would prefer to have clients be able to simply log in to a workstation and fill out the application themselves.

Workflow Step 2: Documentation

In this step, BSDWs create a client file, input information from the application package, and follow-up with clients to obtain necessary paperwork such as bills, bank statements, proof of residency, along with other verifications (phone bills, rental agreement forms, etc.). Consent forms are signed, case notes are created. Many BSDWs noted that they had to keep all intake case forms on-file in physical form. BSDWs may need to investigate whether the client is obtaining support off-reserve or in another community.

Workflow Step 3: Approvals

Forms are sent to various parties for approval (e.g., chief and council, provincial and federal government parties). Amounts for shelter, basic, utilities, rent, etc. are determined, budget and decision (B&D)[49] forms filled out. Several BSDWs noted that having to send hard copies of some forms caused important delays.

> *We have to mail in some of the forms for people with disabilities, so it takes a very long time before we can get people on disability support. That's a technology issue.*
>
> *–BSDW, Kelowna Regional Engagement Session*

> *In our job, if you sneeze you have to fill out a B&D.*
>
> *–BSDW, Prince George Regional Engagement Session*

Workflow Step 4: Ongoing client support

Many clients are continuously job searching, and BSDWs provide assistance by referring them to various employers, departments, or recruitment agencies. BSDWs may also provide help (as needed) to clients for finding training and education, health and healing, bill payment, child support and caretaking responsibilities, groceries and basic needs, as well as shelter. BSDWs keep up to date case notes.

> *They say that our federally funded program is related to the provincial program – they pay out their shelter portion to clients directly, whereas we need to pay for wood, hydro, rent, and document it all, there's huge micromanagement.*
>
> *–BSDW, Prince George Regional Engagement Session*

Workflow Step5: Cheque requests, signature

BSDWs report 1-2 days to process cheques and get them signed by relevant approvers. In addition, there may be delays if cheque-signers are out of town or unavailable. During the cheque run, the BSDW is responsible for financial documentation to some degree, depending on size/relationship with the finance department.

Workflow Step 6: Safety procedures

A small number of BSDWs commented on a regular security step in their workflow (e.g., clearing the office so that there are no appointments on cheque run day).

Workflow Step 7: Internal monthly reporting

While most BSDWs are using a quarterly DCI, they do monthly collection and input of the information required for each of the three months in each quarter. For monthly reporting, BSDWs collect information on statistics like education, housing, and clients with special needs. A month end reconciliation report is typically published in conjunction with finance. This step often involves an integrated software solution, if available.

Workflow Step 8: Quarterly DCI reporting

Compiling and submitting the information for a quarterly DCI takes a significant amount of time for many BSDWs, as described below. For others with the right tools, compiling and submitting DCIs is a process that takes an hour or less of their time.

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[49] "The Budget and Decision Form (901-25) is used to document all applicant resources and monthly requirements to determine whether the applicant is financially eligible for income assistance, and the amount of that eligibility." (Department of Aboriginal Affairs and Northern Development Canada, "Social Development Policy and Procedures Manual," BC Region, Volume 1 of 4: Income Assistance Program: Chapter 3, Application and Assessment, February 2010). Retrieved from https://www.stoloNation.bc.ca/files/Image/Images/Income%20Assistance/AANDC_SD_Manual_Vol1_Stolo_Version_2015-06(1).pdf October 07, 2020.

Variation in Reporting Burden

The amount of time that each of these steps takes varies significantly from BSDW to BSDW, and time commitment depends on clients, caseloads, context, as well as reporting tools and software.

> *We're set up to fail. We have so many reporting requirements that we have no time to invest in helping our clients re-enter the workforce or improve our wellbeing.*
>
> — BSDW, Vancouver Regional Engagement Session

On average, BSDWs spend 12.59 hours monthly compiling DCIs. As shown in Figure 13, this involves a significant range: about a quarter of respondents (24%) spend an hour or less every month, while another quarter (also 24%) spend 16 hours or more. The remaining half of BSDWs spend somewhere between one and 15 hours a week compiling data for the DCIs.

Number of hours spent compiling DCIs (monthly)
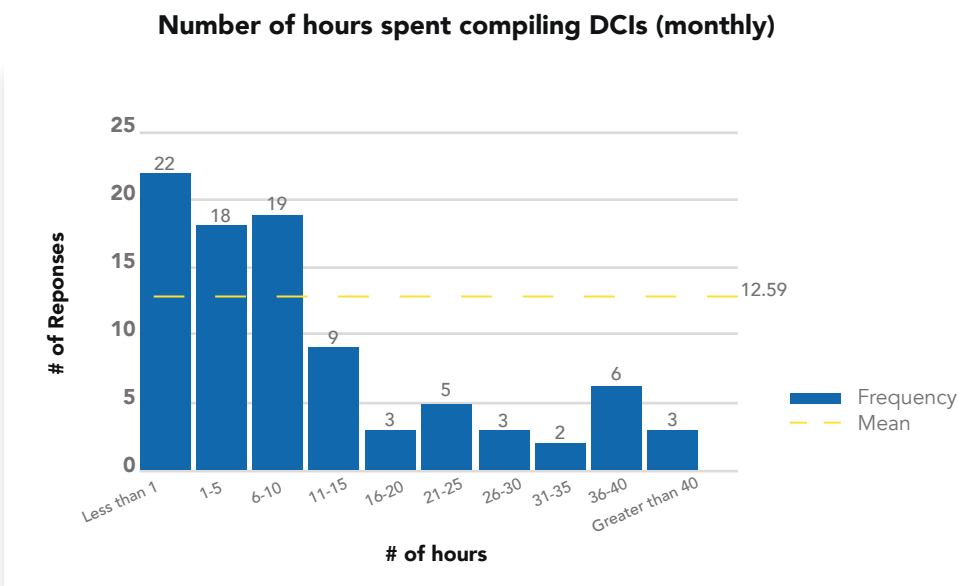
Figure 13:
Hours spent compiling DCIs, monthly. (BC BSDW Survey 2020, n = 90)

BSDWs, software providers, and ISC personnel all voiced that the 2019/2020 DCI was particularly challenging: it asked for extensive personal information, it caused significant extra programming hours for software providers (to adjust a solution that was then not used, in many cases), and no parties particularly wanted to be handling or handing over sensitive data about clients' dependents, including children.

> *Because of what INAC is now asking for in its National strategy, a historically 6-page quarterly DCI could expand into a 66-page DCI—that's the wrong direction. I support accountability and reporting, but I don't support turning a social case worker into a financial or data entry person/auditor.*
>
> — Integrated Software Provider

The issues with the DCI 2019/2020 form might be reinforced by a slight trend in reporting hours: the mean hours spent compiling the 2019/2020 quarterly DCI are slightly higher than that of the other two types of forms (13.69 hours vs. 12.54 hours for the 2018/2019 version).[50] However, it is important to note that this trend is not distinct enough to be statistically significant given the sample size, and that both the 10-year grant DCI and the 2019/2020 DCI are newer forms such that BSDWs might have less experience working with them, or might be answering the question about hours of compilation based on older memories of working with a different type of DCI (particularly for the 10-year grant agreement category, where many respondents who selected it noted that they were very new to the program).

Evaluations of on-reserve IA have suggested that current DCIs are flawed and may lead to limitations in terms of validity and reliability of internal data related to client outcomes.[51] Further, the ISC joint evaluation of IA reform proposed that "one possible consideration for future programming is the simplification of the funding application and reporting processes for service providers."[52]

> *Having BSDWS' input into the reporting template would be nice… we understand that there needs to be accountability to the dollars, so just having said that make the reporting more user friendly, more client-based—why do you need ages, etc.*
>
> *— BSDW, anonymous, in open-ended survey response*

Partially in response to DCI-related reporting burdens, the AFN Technical Working Group on Social Development was developed in 2017,[53] and it hosted Annual National Forums on First Nations Income Assistance in 2018 and 2019.[54] Of five recommendations from the 2018 ISC Evaluation, one was that "ISC work with First Nations organisations to develop new reporting mechanisms and protocols that respond to both community needs and public reporting requirements, without being burdensome to Income Assistance administrators." As of 2018, the AFN and ISC were working together to make changes to the DCI.[55]

Resubmitting Lost DCIs

Several BSDWs at the regional engagement sessions noted that they often had to resubmit lost DCIs to ISC, where "lost" means that the BSDW were notified that ISC did not receive it and felt that it had been misplaced either through accident or technical error. In the BSDW survey, DCIs have been "lost after they tried to submit it" an average of 1.27 times for each BSDW (over the course of their tenure in the role). In aggregate, this had occurred more than 100 times (115), with a range from 0-6 times for individual BSDWs. BSDWs spent an average of 2.1 hours resubmitting a DCI when it was lost. Beyond being a minor inconvenience, several BSDWs saw DCI loss as a significant frustration and a sign that their time was not respected.

> *We want to know that the process is secure, and our clients want to know the same. We'd like to see more accountability when they receive it, it's a slap in the face if they've lost something that's personal information after you've spent so much time submitting it. We have a copy, it's not about that, it's about accountability.*
>
> *—BSDW, Kelowna Regional Engagement Session*

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[50] Where n = 84 in a comparison of BSDWs who both estimated hours spent compiling DCIs and listed DCI form. Source: BC BSDW Survey, 2020.

[51] Idem, 9.

[52] Indigenous and Northern Affairs Canada, "Joint Evaluation of the On-Reserve Income Assistance Reform", 2016, p.33.

[53] Assembly of First Nations, "Income Assistance", n.d.

[54] Assembly of First Nations, "Issue Update: November 2019", 2019. https://www.afn.ca/wp-content/uploads/2020/01/30-Income-Assistance.pdf, p.2.

[55] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018, p. v.

Similarly, many BSDWs reported difficulties accessing their compliance status in a prompt and accessible manner. Several noted that they thought there was a BSDW "portal" for this purpose but that they did not find it to be very user friendly, and most had not heard of this service.

> *There's a portal, but trying to get on it is a headache in itself. I can't find forms there—I can't find anything.*
>
> *— BSDW, anonymous, in open-ended survey response*

What Technological Tools do BSDWs Use in Their Jobs?

Hardware

Essential workplace tools used by BSDWs include computer workstations (monitor, keyboard, mouse, etc.), printers, fax machines, servers, photocopiers and scanners, debit machines, stamp machines, phones, and recording devices.[56] During the regional sessions, BSDWs noted that hardware was essential both for basic completion of their jobs and for client confidentiality—many noted that having their own scanner, printer, and fax line would greatly assist with this, commenting that if they shared a printer with other band office departments they were having to print client files in a semi-public space. In addition, more physical space and better office buildings for the IA department were requested with some frequency.

In addition, several BSDWs raised the point that they had hardware for security or desired hardware for security, such as a panic button, an intercom system, or a camera and remotely locked door outside of the IA office. Direct deposit for clients (i.e., not relying on having to distribute or withhold physical cheques) was also mentioned as an investment that would improve BSDW safety during the regional engagement sessions.

Also in the regional engagement sessions, BSDWs commented that they faced challenges working securely while out of office, a challenge exacerbated by COVID-19. Several comments noted that a work laptop would help with this endeavour, but that the requirements to hold paper files securely still made working from home challenging:

> *When we work from home there isn't access to a scanner, etc.*
>
> *— What We Heard session 1*

As noted in Figure 15, BSDWs use a number of hardware tools to back up and store IA files. Some Nations make use of cloud storage, while others use local backups only. Software provider interviewees noted that they were typically happy to accommodate band IT preferences, and backup and storage is discussed further in the following section on software provider perspectives.

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[56] BSDW Survey, answers to open-ended question, "what hardware do you most commonly use throughout the workday?"

**Where do you keep your Income Assistance records?**
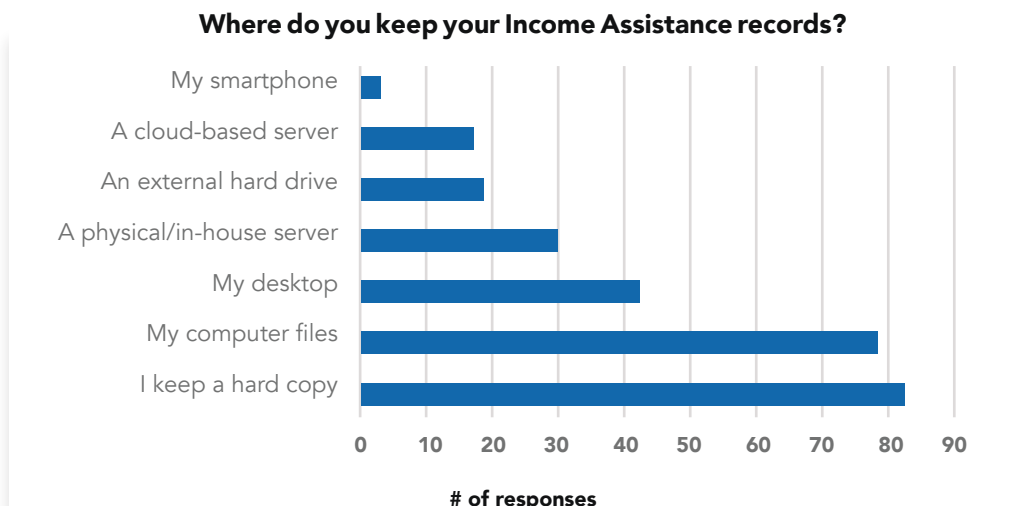
Figure 15:
Saving location for IA records (BC BSDW Survey 2020, n = 142).

In addition, BSDWs are using a wide array of workstations. Figure 16 is an overview of BSDWs' open-ended responses to the question, "what type of computer do you use?"

What type of computer do you use?
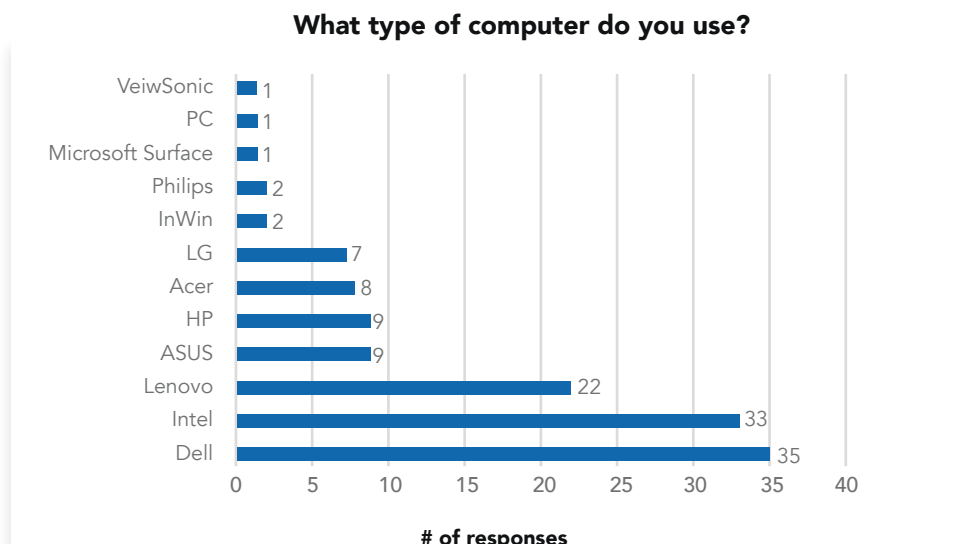
Figure 16:
Brand of computer used by BSDWs (BC BSDW Survey 2020, n = 130).

Internet Connectivity

In addition to hardware tools, BSDWs rely on a good internet connection to be able to connect with outside agencies (e.g., when paying a client's BC Hydro bill), access helpdesk support, email a question or form to ISC, or upload files. BSDWs were asked to run speed tests from their workstations in order to provide the research team with an understanding of the quality of internet in BSDWs' offices. Figure 17 plots the wide array of internet speeds from BSDWs' workplace speed tests, compared with the Canadian Radio-television and Telecommunications Commission (CRTC) goal for all of Canada by 2030 (50/10 Mbps).[57] For all of the BSDWs who ran speed tests (55), 52.7% were below the 2030 CRTC goal for one of upload or download speed, and 40% had tests below 50/10 Mbps for both download and upload speed. Median speed (ordered by download speed) is 51.8/12.0 Mbps, while the mean speed is 75.7/36.6. (download range 0.3-427.2, upload range: 0.1-289.7).[58] Internet speed at the 75th percentile is 101.3/51.0, and at the 25th percentile is 8.3/4.2.

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[57] Government of Canada, "Building a Better Canada: Universal High-Speed Internet," Budget 2019, https://www.budget.gc.ca/2019/docs/nrc/infrastructure-infrastructures-internet-en.html.

[58] Note:. For clarity in Figure 17, 5 data points with values over 200 are not depicted. These are included in the descriptive statistics above.

**Internet Speed Test Results**
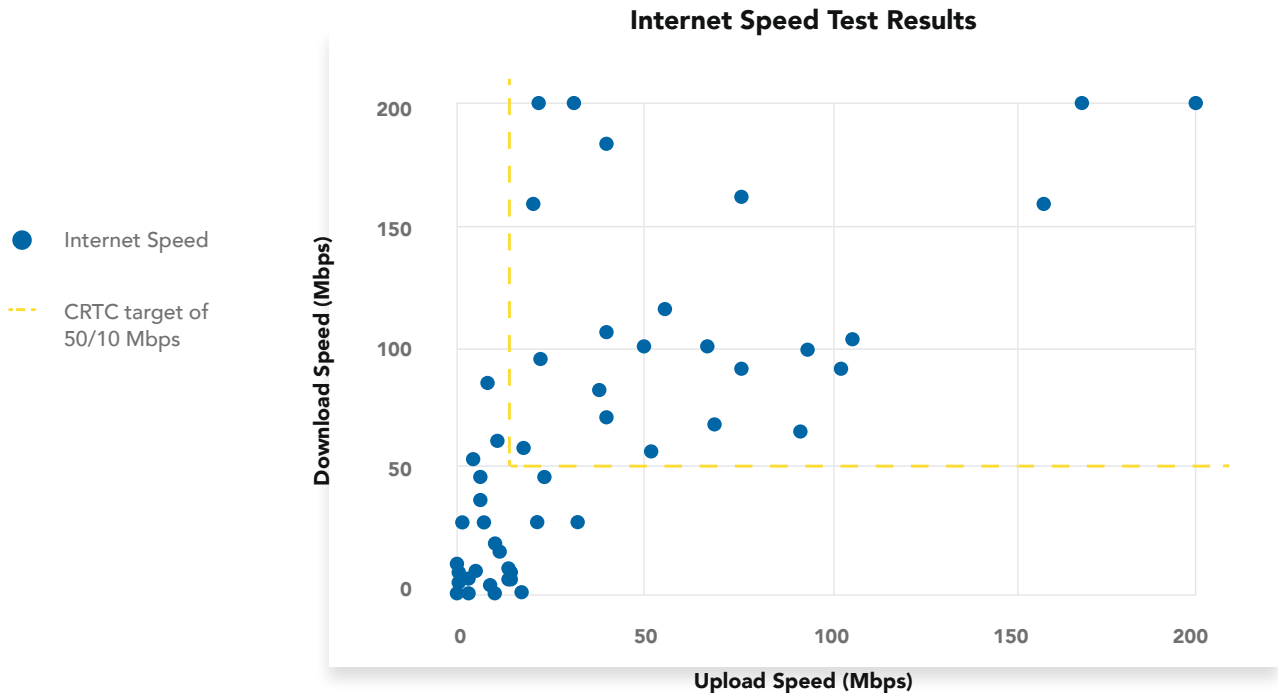
Figure 17:
Results of speed tests of BSDWs, who were asked to take two tests (averaged) in their workplaces to determine at-work broadband (BC BSDW Survey 2020, n = 50)

While most software solutions used by BSDWs are locally installed (and thus do not rely on a strong internet connection), other functions such as DCI uploads, connecting with external agencies, accessing helpdesk support, and working from home during COVID-19 might require a good internet connection. Several BSDWs with slower internet listed it as a challenge to doing their work.

Data integrity and security costs money. If you're going to make sure that these reports are going to be done on a timely basis, make sure the money is there to support it for communities with limited bandwidth. We have some Nations that have great speed, and some that have none, there's a big difference between some places

–Integrated Software Provider

We need better connectivity in remote communities. Some areas don't have basic cell services—once you leave Campbell River, it's like going back to the 60s

–BSDW, Parksville Regional Engagement Session

Software

BSDWs use numerous software tools throughout the day to help organize their files, ease reporting burdens, and communicate with finance teams and clients. In addition to custom IA-oriented software (to be discussed at length in this section), BSDWs reported commonly using Microsoft Office programs, Adobe products, web-based software applications, and QuickBooks.[59]

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[59] BSDW Survey, answers to open-ended question, "what software do you most commonly use throughout the workday?"

In part due to the complexity of DCIs, an industry of third-party software providers who specialize in financial and client management software for band administration has emerged in BC and across Canada. Solutions may include modules for social assistance (SA), membership, finance, education, housing, and other band departments. Many of the providers working with SA or IA modules in BC have been doing so for many years, with decades of experience in building custom solutions for First Nations, as well as providing ongoing support.

Nevertheless, not all Nations have access to integrated software solutions to assist with data collection and reporting. In Figure 18, below, it is clear that approximately one third (32%) of BSDWs are using pen, paper, and Microsoft Excel to compile their reports, as these are the tools which BSDWs are left with if they are not using any type of integrated software solution.

> *Reporting with Excel is awful, a tedious and slow process.*
>
> *—BSDW, Prince George Regional Engagement Session*

In addition, not all BSDWs were aware of all of the software options available. During the regional engagement sessions, BSDWs had the opportunity to hear from their colleagues about what software solutions they used, how they found them, and any things they liked or did not like. Due to the differences between modules offered by different software providers (which impacts integration with other band departments) and different fee/license structures, several BSDWs voiced that more information would be helpful to allow them to compare solutions.

Figure 18 illustrates some of the major software providers who offer IA modules and are used by BSDWs in BC. The most common integrated software solution is Xyntax Systems. Notably, several BSDWs commented that the decision to adopt or change software providers sometimes originated with band finance departments, and that BSDWs were asked to use whichever program was being used by other administrative departments. Those who responded "other" were sometimes using solutions unique to a particular Nation (for example, TIFIS is a solution developed exclusively for Cowichan Tribes) or older software solutions. Importantly, several other types of finance-oriented solutions (e.g., Quickbooks) were being used by BSDWs for certain functions, but the solutions listed below all offer IA modules that are specifically designed for First Nations administration.

**Current Software Used to Generate DCI Data**
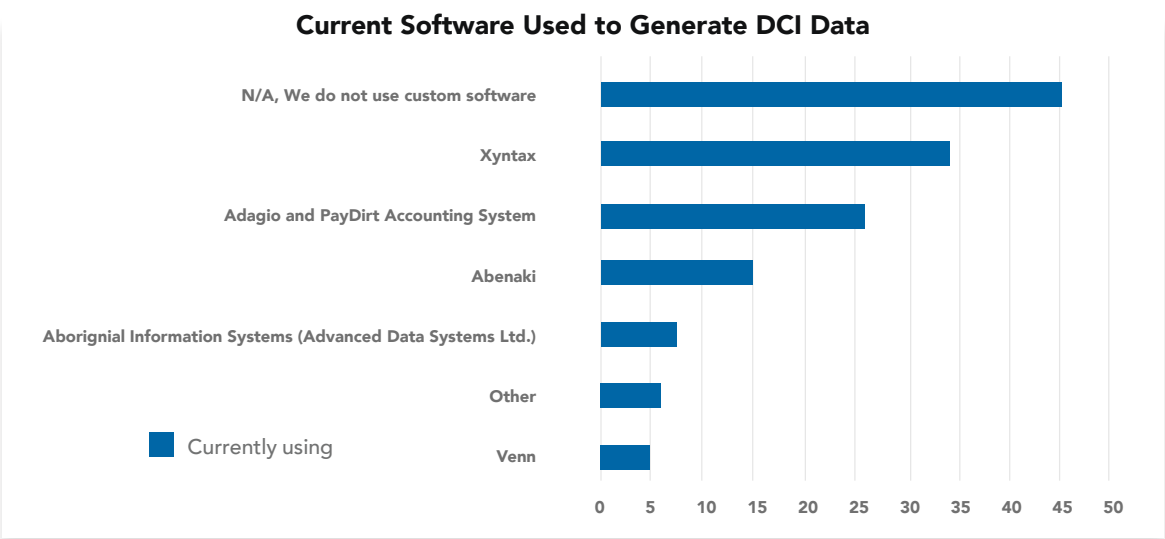
Figure 18:
Type of custom software used currently by BSDWs to generate DCI data, BC BSDW Survey 2020 (n = 140).

Access to IA software may be related to a community's financial resources, if size can be taken as a rough proxy for resources. As shown in Figure 19, it seems that communities with smaller populations (of 200 or fewer people)[60] may be less likely to have access to integrated software solutions: 41% of smaller communities use integrated software as compared with 86% of medium-sized communities (201-500) and 84% of larger communities (of over 500 people). Similarly, there appears to be a relationship between population and the type of DCI used (the 10 year grant is increasingly common in larger communities), and between population and the education of BSDWs (a greater share of BSDWs have postsecondary degrees in larger communities).
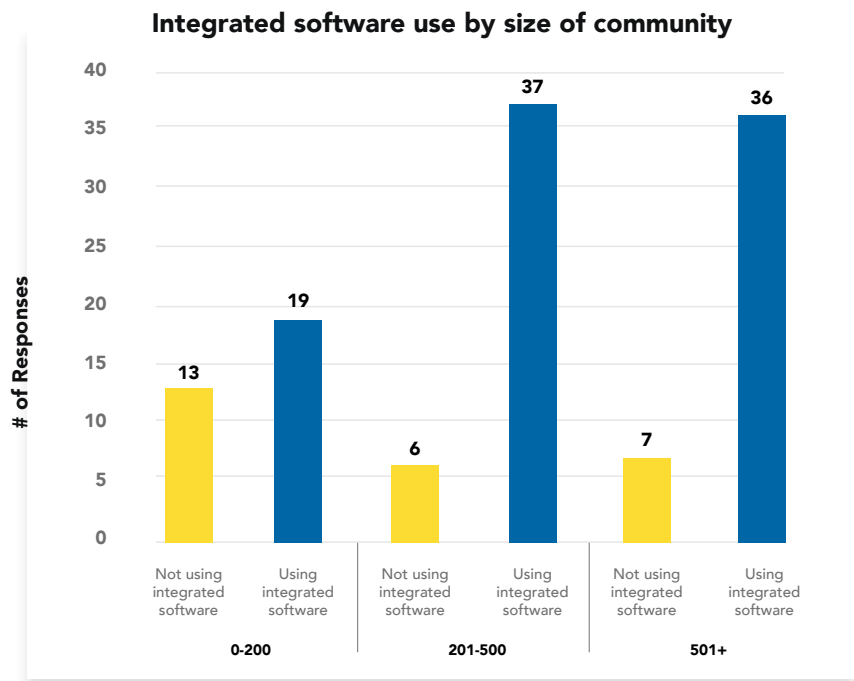

Figure 19: Integrated software use by community population (BC BSDW Survey 2020, n = 118), population data from Statistics Canada 2016 Census

What is the value of an IA-specific software solution?

Several evaluations of on-reserve IA have noted that BSDWs are "often expected to perform the same duties that a team of staff would do off-reserve." [61] One significant component of these duties is completing DCIs – a process that can be simplified with the help of software that serves to "facilitate less burdensome and more meaningful performance reporting." [62]

Nonetheless, ISC notes "great variability in the data management systems available in Canada" and highlights the fact that such systems remain unconnected to IA administration in most jurisdictions.[63] The 2016 Joint Evaluation found that First Nations had to adapt to changing DCI requirements, as their data systems, in many cases, were no longer compatible with new data collection requirements. Further, the evaluation acknowledged that no funding was allocated towards the purchase of software or updating of databases. [64] The 2018 ISC evaluation acknowledged the need for capacity and software investments such as IT databases to support IA program administrators.[65]

In a comparison of those who have access to integrated software vs. those who do not, it seems that use of integrated software might decrease the number of data entry hours needed for BSDWs in compiling DCIs – nevertheless, software alone is not sufficient to fully reduce data entry labour, as demonstrated by Figure 20 below and the interviews and engagement sessions (discussed in the analysis to follow).

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[60] In this use, population represents all persons living in a First Nation band or Tribal Council area.

[61] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018, p. 23.

[62] Ibid.

[63] Ibid.

[64] Indigenous and Northern Affairs Canada, "Joint Evaluation of the On-Reserve Income Assistance Reform", 2016.

[65] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018.

Hours spent compiling DCI by access to integrated software
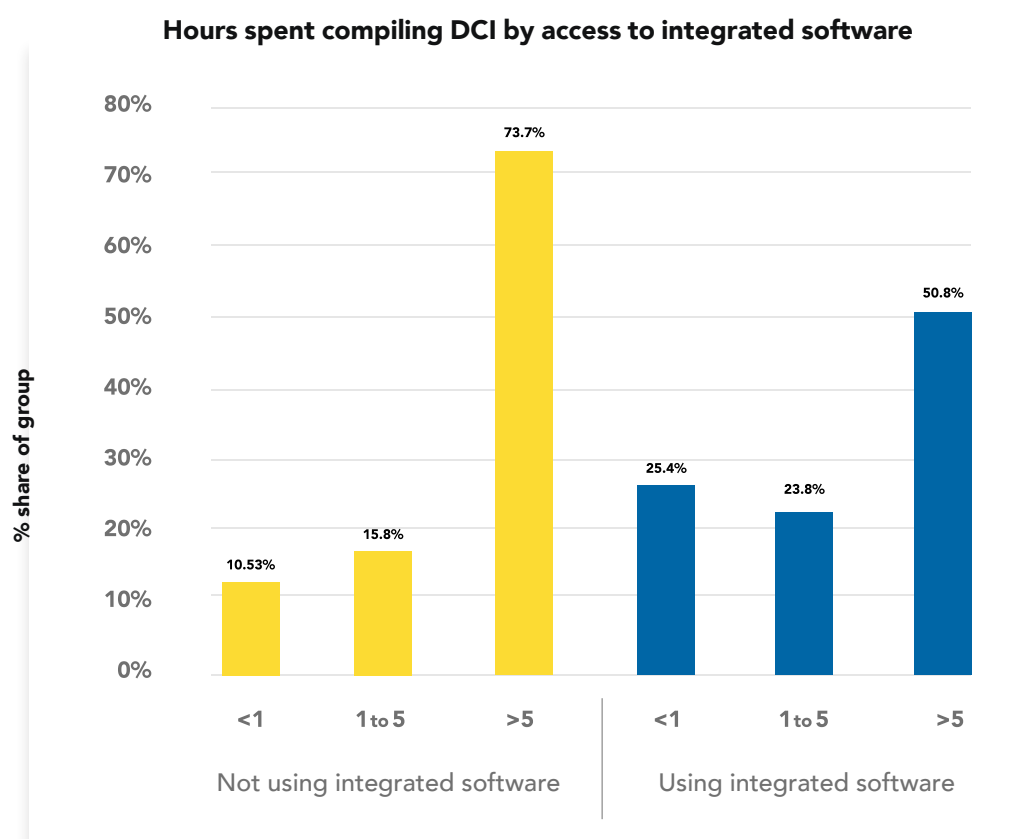
Figure 20:Hours spent compiling DCI by access to custom software (BC BSDW Survey 2020, n = 82).

In describing the software solutions they habitually used, BSDWs talked extensively about training needs and helpdesk support, both of which are likely to help reduce data entry hours. In addition, each of the various software solutions available offers a suite of user experience features, and BSDWs were asked to share feedback on what features were most useful from their perspective.

> *The benefit for us is that every member has a profile that links them to their payment, education, profile, assistance—we have everything connected and it spits it [reporting statistics] out every time.*
>
> *—BSDW, Prince George Regional Engagement Session*

Complementing BSDW feedback, the research team interviewed five integrated software solution providers and asked them to share their comments on their experience working with IA reporting. From their feedback, it is clear that software providers have additional needs that could improve their products, including better communication about DCI changes, alterations to the DCI to make it programmatically fillable, and greater support for their BSDW clients in the form of policy training and compliance notifications.

In what follows, software solution providers and BSDWs responses are used to inform an overview of necessary components of integrated software solutions for IA reporting.

BSDW Feedback on Software Solutions: About the Activity

At each of this study's five regional engagement sessions, BSDWs were asked to form groups based on the software solutions they used at work (with one group dedicated to Microsoft Excel & paper if they did not use a different reporting software) and list shared pros and cons.

While each of the regional sessions had at least one group that formed around Microsoft Excel and Xyntax, there were a variety of other software solutions represented, depending on the region. AIS (formerly Aboriginal Information Systems); Adagio and Paydirt; and Venn software were all represented in more than one session, while several other solutions only appeared at one of the regional sessions. For some, such as Abenaki, this may have been because the product is an out-of-province solution. Others, such as TIFIS, were proprietary and custom solutions built by particular Nations, while others (Tribal and Unification) were older solutions that many bands have transitioned away from.

Session/Group	Microsoft Excel	Abenaki	AIS (Advanced Data Systems)	Adagio & Paydirt	TIFIS	Tribal System	Unification	Venn	Xyntax
Prince George	✓	✓		✓					✓
Kelowna	✓		✓			✓		✓	✓
Parksville	✓		✓	✓					✓
Prince Rupert	✓								✓
Vancouver	✓			✓	✓		✓	✓	✓

Figure 21:
Groups that BSDWs formed around particular software solutions at each of the regional sessions.

Within this activity, BSDWs were asked to make their own list of "pros" and "cons" to each solution on chart paper within a group, without facilitator intervention. At the end of the activity, groups reported back to the room, and other members of the session sometimes asked for advice or recommendations if they liked the sound of a particular solution.
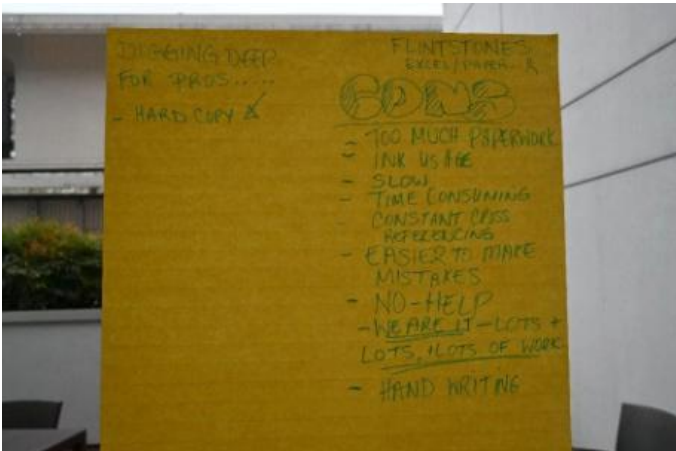
Figure 22:
Vancouver Regional Engagement Session, Sofware pros and cons activity, Excel and Paper Group.

Figure 23:
Word Cloud of All Software Activity Comments. Note: Like words (e.g., plural and singular) were grouped for this visualization. Small words (e.g., conjunctions or prepositions) and words with only one mention are not shown here.

Other than "pros" and "cons," participants did not do any other theming or categorizing of this activity's materials. Accordingly, the analysis that follows is comprised of a set of themes identified by researchers in an independent coding process (consult Appendix I for methodological notes).

A number of key themes arose from the software activity, including tangible and granular requests for specific features of an integrated software solution that would assist BSDWs to better complete their work. In addition to user experience-related comments, clear themes around reporting and exportability, training, support, and client management emerged from this activity, as sketched in brief by Figure 23.

Notably, the analysis that follows does not break up "Pros" and "Cons" by software brand, as perspectives on different software solutions did not exhibit consensus and varied significantly depending on group, access to training, and access to financial resources for better support, updates, hardware, and connectivity (e.g., some regions seemed to love a particular solution, while others found the same product difficult to learn and use effectively). Accordingly, the following instead reflects common needs that BSDWs voiced a desire for regardless of the particular software solution (including Microsoft Excel), suggesting that any recommended software for income assistance should seek to have the following features.

1. User Experience-related Comments and Recommendations.

Overall user experience, "ease of use," and "intuitive" interfaces were among the most-frequent qualities that BSDWs preferred in software solutions. A few particular features emerged as very important in a reporting software's user experience (or UX) design, how easy it is for a user to pick up and use software quickly and comfortably):

Automatic calculation of statistics and error-checking (e.g., "Pro: informs you what you are missing" vs. "Con: formulas can become easily disrupted")

Easily fillable forms that make revision and review simple (e.g., "Con: corrections can be difficult," "Con: Data inputting is key or else it is hard to find/you can lose it," or "Con: mistakes can easily happen as there are too many steps").

An intuitive, navigable user interface(the screen that users interact with in order to get things done; e.g., "Con: monstrous spreadsheet with 35+ column," vs. "Pro: easy to read," and "Pro: everything is available with a touch of a button")

Software Provider Perspectives: Software providers listed many of the same considerations as BSDWs. They noted that ease of use, simple interfaces, and flexible "order of operations" for data entry were helpful. They commented on the importance of quick essential tasks such as payment processing and B&D generation, as well as good client management, scan-to-file, automated form-filling, and automatic error-checking and statistics verification, as well as form preview screens.

2. Communicating with Finance and Membership: Integration and Interoperability with other Departments and Modules. It was important to many BSDWs that their software reconcile effectively with other Band departments (notably Finance, Membership, Housing, and Education) in order to avoid duplication of data-entry labour (another theme in this analysis). Finance, in particular, was a priority for interoperability: BSDWs described lengthy processes of ensuring that their work matched the Band's general ledger, submitting B&D forms, or getting cheques issued, and appreciated software solutions that automated some of these processes for them by working well with Paydirt or whatever accounting software was being used.

Pro: Everything is linked (IA, Education, Payroll, Housing)

Con: Have to do statistics separately, stats have to match finance's before report can go in, when 2 reports match then goes into a template review documentation reporting then sent to ISC, have to make three copies.

Pro: Ensuring payments on GL are linked to Soc. Dev. Module.

One comment reinforced the need for the user experience feature of editable fields, as well as flexible order of operations discussed earlier, noting that one downside of interoperability was that it made IA's reporting dependent on the accuracy of other departments. However, access to financial data, when appropriate, could help ease a BSDW's interactions with clients and clarify responsibilities in otherwise messy interactions:

> *I really like the income verification button—if it's linked to their salary, it will show us if they've made money. The other I like is, a client said she didn't get paid, and we were able to prove that she was by printing out a report that tracks all the cheque numbers.*
>
> *—-BSDW, Kelowna regional engagement session*

Software Provider Perspectives: *Many software providers first began with a single focus (e.g., finance reporting or membership) and then added modules to their solution over time to become a comprehensive set of offerings for band administration. All of the providers interviewed had expertise with the Income Assistance module. There were three rough 'types' of software solutions in these interviews: those that began as a finance-focused solution and added on IA and other modules; those that began as membership/IA modules and worked to develop compatibility with finance programs; and "one stop shops" that had customized/built out all of their own modules for every department.*

3. Client/Case/File Management.

In addition to interoperability with Membership, Education, and other modules that might automate several aspects of file management and documentation for BSDWs working with clients, it was important for software solutions to:

> **Manage client documents effectively** (via scan-to-file ability, space to keep all client files in "Clear and complete member profiles," in an organized manner such as "Pro: Tab for ID, Doctor's Note, B&D & Bills").)

> **Automate key client management processes** such as auto-rolling cheque runs to the next month; auto-calculating necessary statistics for reporting; and providing reminders to update client info at regular intervals).

Software Provider Perspectives: *Integrated software providers agreed that case management was an essential part of most of their solutions (this varied depending on the product). Modules more oriented towards membership and case management were increasingly integrating ways for BSDWs to track intake information such as workplace experience and skills, with one provider offering a skills-matching database that could be used by BSDWs to pair clients with employers. Software providers agreed that client information and payment records should be auto-generated rather than manually re-added monthly.*

4. Ease of Export to DCI, Assistance with Compliance.

While users of Microsoft Excel often noted that they found reporting labour-intensive, several users of integrated software solutions commented that they needed to re-enter statistics into the DCI anyhow because their software would not generate the correct template. Solutions that would export directly into a template that would be accepted as compliant by ISC were appreciated, while solutions that made BSDWs re-enter data, or that seemed to fail in sending the reports, added time and stress to BSDWs' jobs.

> **Pro:** Push a button to get your Q1, Q2, Q3, Q4 reports.

> **Pro:** Compliance.

> **Con:** Not receiving our reports, having to resubmit up to 3X.

> **Con:** Stats are done differently than ISC, have to do them separately.

Software Provider Perspectives: *Interviewees working with quarterly DCIs noted that they faced significant challenges in creating a program that would automatically populate the DCI forms. Notably, they commented that the Adobe PDFs were not programmable without expensive licenses for themselves and their clients. The best they could produce was either (a) an excel spreadsheet with all of the information that BSDWs would then need to re-enter, or (b) a facsimile PDF that looked exactly like the DCI but behaves as a locked scan. Those working with the 10-year grant found it to be much easier to generate the necessary information, due to its relatively concise and infrequent reporting requirements. Accordingly, software developers requested consultation from ISC on DCI creation in order to generate a programmable alternative for their clients.*

5. Duplication of Labour

Related to the previous categories, a significant pain point for many BSDWs was the need to enter and re-enter the same data for a variety of different reports, modules, and templates. While this theme is inextricably connected to interoperability, client management, and ease of export, it is worth mentioning separately due to the variety of comments that focused on duplication of efforts as a clear frustration, illustrated by a few representative comments here.

> **Con:** Constant cross-referencing.
>
> **Con:** Entering more than 1x – housing, social development, etc.
>
> **Con:** Too much paperwork, time consuming.

Software Provider Perspectives: *Most software providers tried to reduce or eliminate duplication of labour and data entry where possible, but faced some challenges if a Nation was using their IA module but another provider's finance or membership module. In addition, as noted, software providers were not able to auto-fill DCIs, unanimously, and could not eliminate that duplication from the process.*

6. Ongoing Training and Support

BSDWs voiced appreciation for software license agreements that afforded ongoing helpdesk access and support. In particular, several participants mentioned that they liked support staff's ability to create a remote login connection and walk them through issues. They appreciated timely and responsive customer service, but were frustrated when there was "no help" or "no support or manuals." One group of Excel users noted that they did not receive ongoing support in the same way as most participants with integrated software solutions did.

Software Provider Perspectives: *Integrated software providers had a range of helpdesk and support service agreements, ranging from per-hour fees, to annual unlimited subscriptions, to perpetual training agreements included in up-front license purchase. Most interviewees had dedicated helpdesk or support staff, and those that did not were typically very small organizations with individuals wearing multiple hats.*

7. Initial Training

Several pro and con comments pertained to the quality of initial training on a software solution. Comments were appreciative of initial on-site training (combined with ongoing support, as discussed above) and, in general, wanted more start-up training. While several solutions were mentioned in this category, Xyntax had noteworthily different responses: at two sessions, participants voiced having difficulties learning the program, commenting that it had a very high learning curve and that they would benefit from additional training. Other sessions voiced that they found it easy to access and learn. One participant suggested that initial training should account for BSDWs' age and experience with new technologies.

Software Provider Perspectives: *Most software providers were offering in-person, on-site training prior to COVID-19 but have since transitioned to remote training. To date, most report that remote training seems to be going well and may be a sustainable solution, though some installation processes may require a staff member on site (particularly if hardware such as a server and workstations is also purchased). Software providers who had experience with training noted that orientation was helpful, but that most training occurred when BSDWs began to use their IA module and first encountered questions about data entry, statistics, and reporting.*

8. Expense

Several groups listed expensive licenses, contracts, annual fees, and upgrades as "Cons" when discussing integrated software solutions. Three of these comments requested additional support from ISC and other sources for program costs, as well as for trainers to come visit their communities. In group report-back sessions, Excel user groups sometimes asked after license costs and whether or not Bands were able to access financial support (and if yes, where)—accordingly, while "Expense" falls lower on the list of frequency of comments, it took a bigger role in the verbal conversation following the written activity.

Software Provider Perspectives: *Some software providers structure their fees as an initial purchase of user licenses (sometimes also hardware, workstations, servers) and a support agreement, plus periodic upgrade fees (either mandatory or optional, depending on the provider). Several are solely based on periodic fees, while one is entirely community-owned. Most providers noted that upgrades were essential, both due to DCI changes and due to important development updates. Software providers held different philosophies about the value of different fee structures: some felt that purchasing an up-front license was better so that a community would still have access even if they couldn't afford annual fees. Others felt that annual fee structures guaranteed better continuous support. Fees typically differed based on community size, number of workstations, and caseload.*

Some software providers were unaware of grant support for communities to afford their solutions. One provider noted that they actively help clients find software funding sources and stack them together to create enough support to purchase a license

9. Data Storage, Backup, and Client Privacy

Several groups commented on aspects of software like "good data management" or "cloud storage and backup." In addition, features like "controlled access" that kept client data safe were appreciated.

Software Provider Perspectives: *Back-up solutions vary significantly from provider to provider. Most software solutions do on-site backup only, working with Band IT departments or local IT subcontractors, with one interviewee noting that this decision was made due to OCAP principles and considerations of community control. Another provider used a secure offsite backup on an external drive along with on-site backup, while a final one had a wide variety of backup solutions (on-site, cloud, etc.) depending on client requests. Most providers had a form of "limited access" available to IA modules so that other users (finance etc.) could interact with IA on an as-needed basis.*

10. Software Speed, Age, and Internet Connectivity

While a handful of participants commented that their programs were sometimes "slow" or "need updating," only one comment explicitly pertained to connectivity, noting that "connectivity is sometimes impossible to use so client must return on another day." Some of the comments pertaining to slow software solutions were for programs that were older or not recently updated.

Software Provider Perspectives: *All software providers noted that their programs could function entirely offline, with local installation either as a default or as an option. Software developers noted that in extreme cases, poor connectivity might impact their helpdesk speed, and they had noted that this had been an occasional issue for some BSDWs working from home during COVID-19. In addition, they noted that BSDWs may still need good connectivity to interact with ISC and submit reports, though these functions did not happen directly through their software solutions.*

Software and Client Data: A Universal System, or Every Nation's Choice?

The discussion of whether or not a "universal system" for all BSDWs in BC would be useful or not was present at most regional engagement sessions, with significantly varying perspectives.

The case for: Many BSDWs felt that a universal software and data system would significantly streamline their processes, allow them to access training and support from colleagues more easily (if everyone was familiar with the same tools), and help bring Nations with less access to technology up to the level of their peers that were better off. In addition, communities with block funding arrangements noted that their collective reporting processes were greatly eased if they were using the same software. Similarly, clients who moved from one community to another would be able to easily migrate their files, eliminating some of the duplication of labour for BSDWs. BSDWs would also be able to see whether or not a client was collecting IA in a different jurisdiction.

The case against: Other BSDWs felt that "different Nations had different needs," that choice was more important than universality, and raised the issue that many BSDWs had to use whatever integrated software their finance department had chosen to begin with to ensure that their work was integrated with the rest of band administration's. Furthermore, some Nations have spent a significant amount of time and money developing proprietary systems (or customizing existing solutions) that work very well for them, such that transitioning to a universal system would complicate the efforts they've put in to create a working product.

The provincial context: On the provincial level, the 2018 ISC Evaluation notes that "off-reserve, provinces have built service delivery systems to ensure clients receive robust service. Due to the Income Assistance delivery model, First Nations end up delivering Income Assistance with considerably fewer resources than would exist off-reserve."[66] In BC, off-reserve IA is delivered with the help of a $182 million Integrated Case Management System.[67] Introduced in 2008, the system integrates multiple social service programs across the province.[68] Off-reserve IA recipients in BC can use the digital portal[69] *My Self Serve to access* income and disability assistance, apply for assistance, submit reports, and upload forms.[70]

It is not clear whether a similar centralized client management system (and database) would be beneficial to First Nations in BC and BSDWs: on one hand, it may streamline and simplify delivery processes; on the other hand, the challenges that BSDWs face, when compared to their off-reserve counterparts, may be largely related to having more significant reporting requirements, larger caseloads, and additional workplace responsibilities. This question will be explored throughout this report in the subsequent questions on training, communication, and the use of DCI data. Nevertheless, the division in BSDW perspectives suggest that any proposals for a universal system should be opt-in or offer flexible arrangements for Nations to make their own decisions.

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[66] Indigenous Services Canada, "Evaluation of the On-Reserve Income Assistance Program", 2018. https://www.sac-isc.gc.ca/DAM/DAM-ISC-SAC/DAM-AEV/STAGING/texte-text/ev_oria_1557320422981_eng.pdf, p. 29.

[67] It is worth noting, however, that the system has received broad criticism for technological failures, inadequately replacing legacy systems, and high costs: http://www.vancouversun.com/life/alone+using+troubled+software+system+manage+child+welfare/10023345/story.html

[68] Office of the Auditor General of British Columbia, "Integrated Case Management System," March 2015, https://www.bcauditor.com/sites/default/files/publications/2015/Other/report/OAGBC%20Integrated%20Case%20Mgmt%20System_FINAL.pdf

[69] Off-reserve recipients may also do so through a local service office.

[70] https://myselfserve.gov.bc.ca/

Training and Networking: Contextualizing Technology

> *I feel like there needs to be a better overarching BSDW system. The provincial government has a ton more technological resources at their fingertips to help people, that we do not have as BSDW's. The policy manual is online for them, it is a binder for us.*
>
> *—-BSDW, open-ended survey question*

Formal Training Support for BSDWs

Given the complexity of responsibilities associated with IA delivery roles, some initiatives strive to provide support, standardized training, or education related to IA delivery. The First Nations Development Society (FNSDS), an organization that no longer exists, used to act in this capacity along with several other functions (for example, one software provider noted that a former BSDW industry association used to assist them by providing a set of rules for compliance statistics). In the regional engagement sessions, BSDWs commented that FNSDS used to provide "three-stage, standardized training," and that:

> *Previously, compliance was aimed at capacity-building and people got a second chance after they went through training. What if BSDWS who were 100% compliant went to neighbours to provide spot checks and assistance, with financial support from ISC?*
>
> *—-Vancouver Regional Engagement Session*

Other organizations now fill some of this role. Nuu-chah-nulth Tribal Council provides training and support for IA delivery services in BC for 14 Nuu-chah-nulth First Nations.[71] In Ontario, Algoma University provides a certificate in First Nation Welfare Administration – the first accredited First Nation IA program in Canada.[72] While reviewing literature, other similar support initiatives were difficult to identify. Nonetheless, some academic institutions offer Indigenous social work programs, while there are likely other First Nations organizations that provide support to IA delivery staff.

Formal training

(e.g., onboarding, regularly scheduled training for new entrants) was identified as a significant gap by BSDWs, both in the survey and in the regional engagement sessions. When asked to rate the challenges they faced in their roles, BSDWs ranked "**lack of training**" **as the single highest barrier they faced to completing their work**.

Barriers to completing work

Figure 24:
Barriers that BSDWs face to completing their work, ranked by score. Source: BC BSDW Survey, 2020. (n=112-116, where some respondents rated all of the rows above and others missed one or more).

Rank	Description	Average Score (where 0 = "not a barrier," 1 = "a moderate barrier" 2 = "a significant barrier.")
1	Lack of training	1.728972
2	Lack of an advocacy group (e.g., former FNDS)	1.551402
3	DCIs	1.224299
4	Reconciling the General Ledger and DCI	1.093458
5	Lack of IT Support	1.055556
6	Intergrated software (e.g., Xyntax, Paydirt)	0.961905
7	Computer hardware old/slow	0.953704
8	Slow Internet	0.811881
9	Basic computer software (e.g. Excel)	0.559633

[71] Nuu-chah-nulth Tribal Council, "Income Assistance Delivery," n.d. https://nuuchahnulth.org/services/income-assistance-delivery-training-advisory-services

[72] Gayle Broad and Michael Nadeau, "Renewing Funding Relationships: Certifying First Nations Social Service Administrators", 2012. https://crsp.journals.yorku.ca/index.php/crsp/article/viewFile/35324/32602

While several of the other barriers (including DCIs, software, hardware, and internet) have already been discussed at length in this study, the lack of an advocacy group (barrier #2) and lack of IT support (barrier #5) also merit discussion. The former will be discussed in the upcoming sections on mentorship, networking, and investing in BSDW capacity. The latter, much like internet access, varies significantly in severity by community. In one interview, a software provider noted that about 25% of their clients had local IT support, while the other three quarters contracted it out—and for some communities, this is an expensive endeavour. A BSDW on Vancouver Island noted that,

> *There is a need for a trained community technician for IT services because right now it costs $100 for 15 minutes of IT support if we need to call in, which hinders BSDWs' work.*
>
> *—--BSDW, Parksville Regional Engagement Session*

In a similar survey question to BSDWs in Saskatchewan (though structured differently and not directly comparable), "No Formal Training" was experienced by about a third of respondents and came fourth in the list of challenges. As will be discussed below, a third of BSDW respondents in BC also report having no formal training, suggesting that this challenge is not limited to the BC region.[73] Notably, both surveys also show documentation or DCIs as a greater challenge than computer software.

Q11 What are some challenges you face in delivering Income Assitance to your clients?
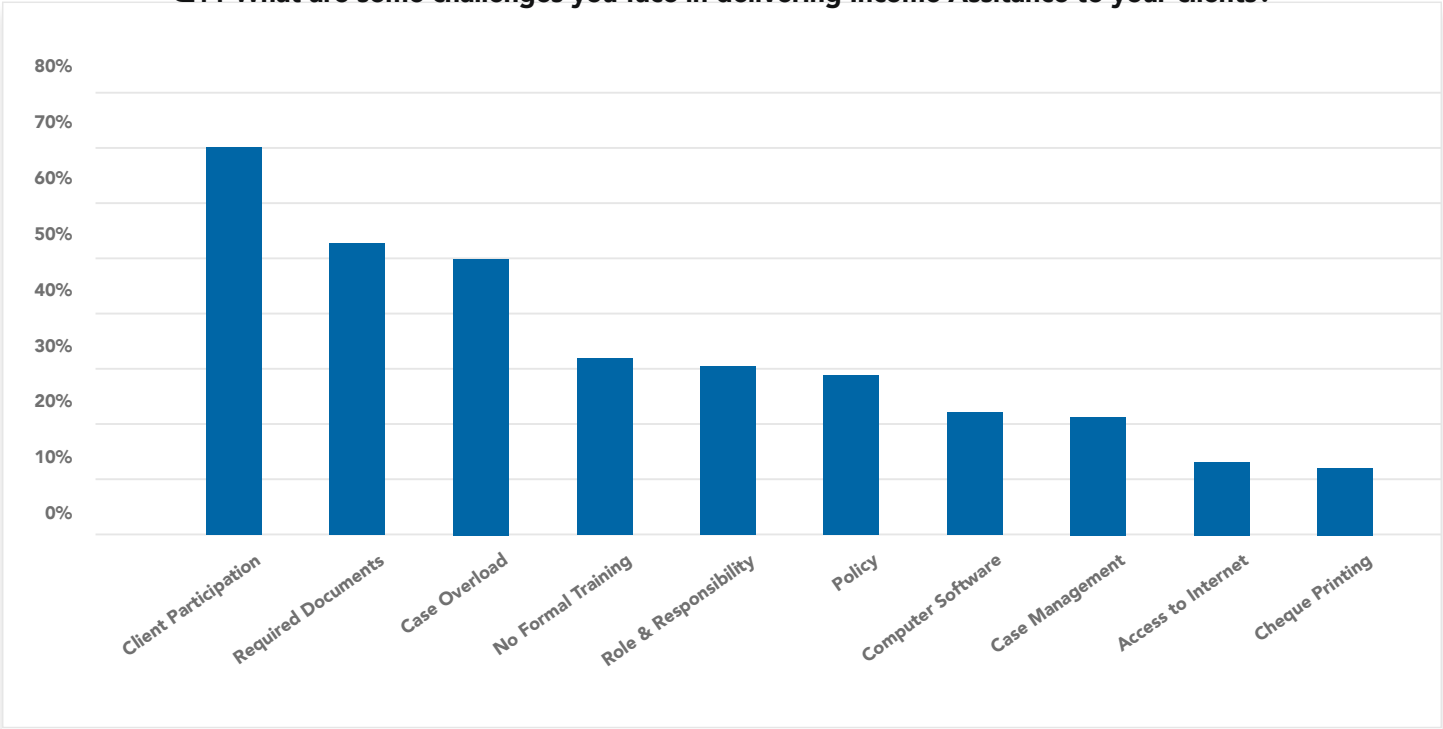
Figure 25:
Source: Saskatchewan First Nations Family and Community Institute Inc., On Reserve Income Assistance Program Reform Project, 2018 – 2019, Final Report, p. 56. http://www.sfnfci.ca/ckfinder/userfiles/files/SFNFCI_May19_IncomeAssistanceProgramReformReport_Print.pdf.

The importance of formal training and the current gap is reinforced by numerous findings. As shown in Figure 26, half of BSDWs (50.4%) received one day or less of formal training. Of these, 38 respondents stated that they received no formal training at all, as illustrated in Figure 27, below.

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[73] Saskatchewan First Nations Family and Community Institute, "On Reserve Income Assistance Program Reform Project", 2019. http://www.sfnfci.ca/ckfinder/userfiles/files/SFNFCI_May19_IncomeAssistanceProgramReformReport_Print.pdf

Duration of formal training as BSDW
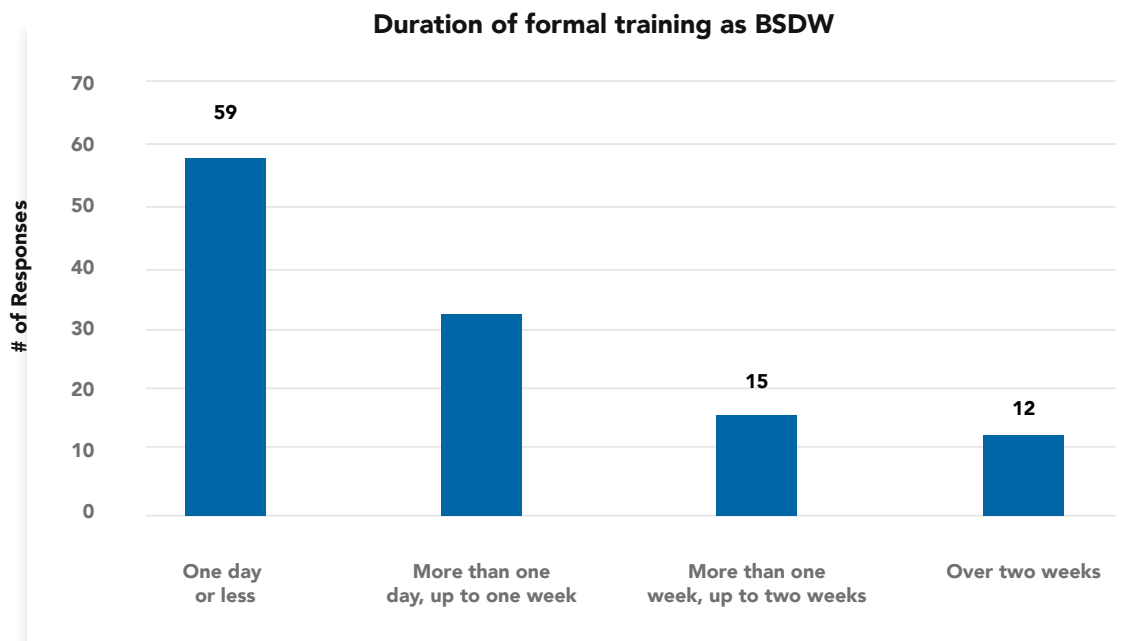
Figure 26: Duration of formal training received by BSDWs (BC BSDW Survey 2020, n = 117).

Figure 27 shows the training BSDWs felt that they had received in descending order by topic. During regional engagement sessions, several BSDWs commented that they weren't fully aware of if there were additional training opportunities available, or how to access funding for them.

Formal training received by topic
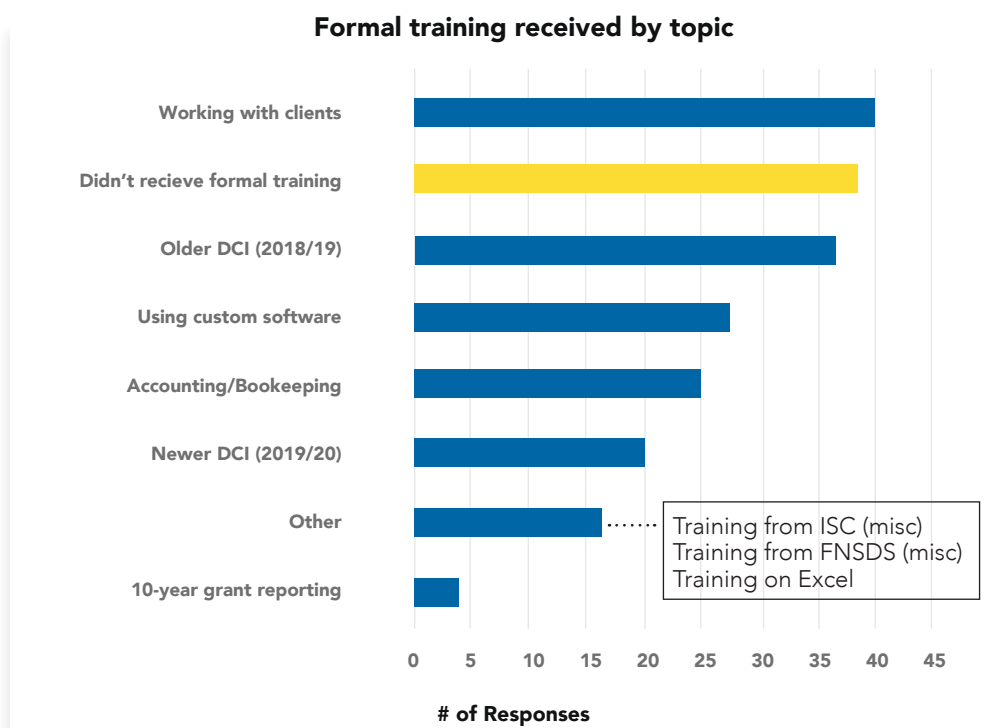
Figure 27: Type of formal training received by BSDWs in BC (BC BSDW Survey 2020, n = 117).

Similarly, BSDWs noted the people who had provided them with formal training. Frequently, formal training was provided by ISC, with other important trainers including the BSDW that came before them (to be discussed further in a subsequent section on mentorship), managers, and software providers. Notably, six of the "other" responses commented that they had received training from the former FNSDS.

Who provided your formal training?
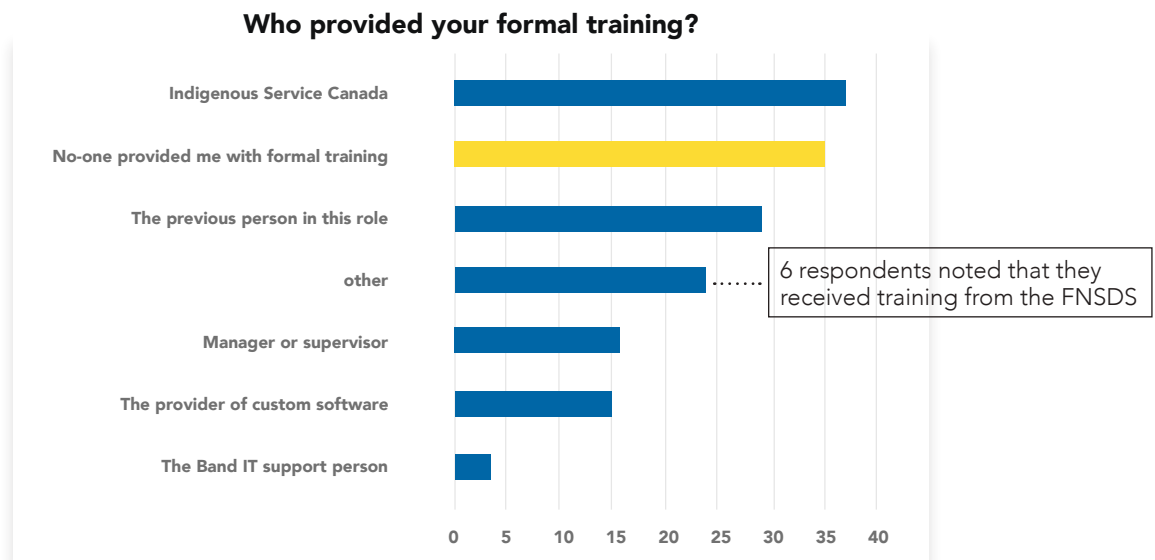
Figure 28: *Provision of formal training by role (BC BSDW Survey 2020, n = 117).*

Training Topics and Content

Breaking down training by type, BSDWs had numerous comments about the type of policy training, technology skills training, and other professional development training they would like to receive.

Policy Training

In general, BSDWs voiced a desire to see more "hands-on" policy training, and noted that "the policy book" method (where a binder is delivered to them to learn and follow) was inaccessible and difficult to internalize. Similarly, they felt that ISC personnel on the reporting and compliance helplines often gave:

• Different answers to the same question (such that the BSDW had to be firm about repeating what their colleague had said);
• Slow follow up to questions or a lack of response entirely;
• Responses of "I don't understand what the form is asking for," or otherwise failing to provide clarity for BSDWs;
• Inconsistent responses over time:

> *We read the policy section, ask the hotline for clarification, and you often get different answers or are told to monitor people for changes in marital status or housing, but then slapped on the wrist for doing so, told 'you're not a private investigator.*
>
> *- BSDW, Prince Rupert regional engagement session.*

• No training for new and significant policy changes (and always reactive rather than proactive, with training only rarely pertaining to upcoming policy changes).

> *Online training is better than no training, and in terms of COVID changes to fiscal policy and how they get money out to clients now, they should have done a training on that. There are so many things that are new.*
>
> *- BSDW, What We Heard session 4*

• A dearth of information about funding opportunities or other subsidies for software.

Overall, comments on the helpline and communication with ISC, as above, often had to do with a desire for greater consistency and support for BSDWs' decisions. As a second example, many BSDWs noted that they had a hard time navigating relationships with other departments in their communities, particularly finance, as well as chief and council. Many felt that they were placed in awkward positions by being asked to implement a policy not of their own devising, without a way to explain it to their Nations. Others commented that council members would sometimes take a BSDW's place by going to a BSDW training and asking them to stay behind, but not reporting back to BSDWs.

Several BSDWs noted that a promise of support from ISC personnel (e.g., offering letters of explanation, training, a dedicated referral phone line, or other support to help them explain their responsibilities to colleagues) would be helpful. One resounding comment was that training consistency would also help BSDWs better support each-other. When asking for help from colleagues, if there were more consistency in training they would be able to share knowledge about what must be on file for an audit, for example.

Technical Skills Training

Figure 29 below shows BSDWs' ratings of their comfort with the software they use to help them with reporting. On the left, we see the comfort ratings of BSDWs who are not using an integrated software solution to help them with reporting, meaning that they are likely using Microsoft Excel to help them compile data. On the right, we see the comfort ratings of BSDWs who are using an integrated software solution. It is possible that the differences between these comfort ratings lies in the dedicated support staff and longer training commitment from integrated software providers as private agencies contracted to provide assistance. On the other hand, BSDWs using Excel rely on other sources of training (not the creators of the software) to help them learn on the job.

BSDW Comfort level with software:
Excel (No Integrated Software) vs. Integrated Software
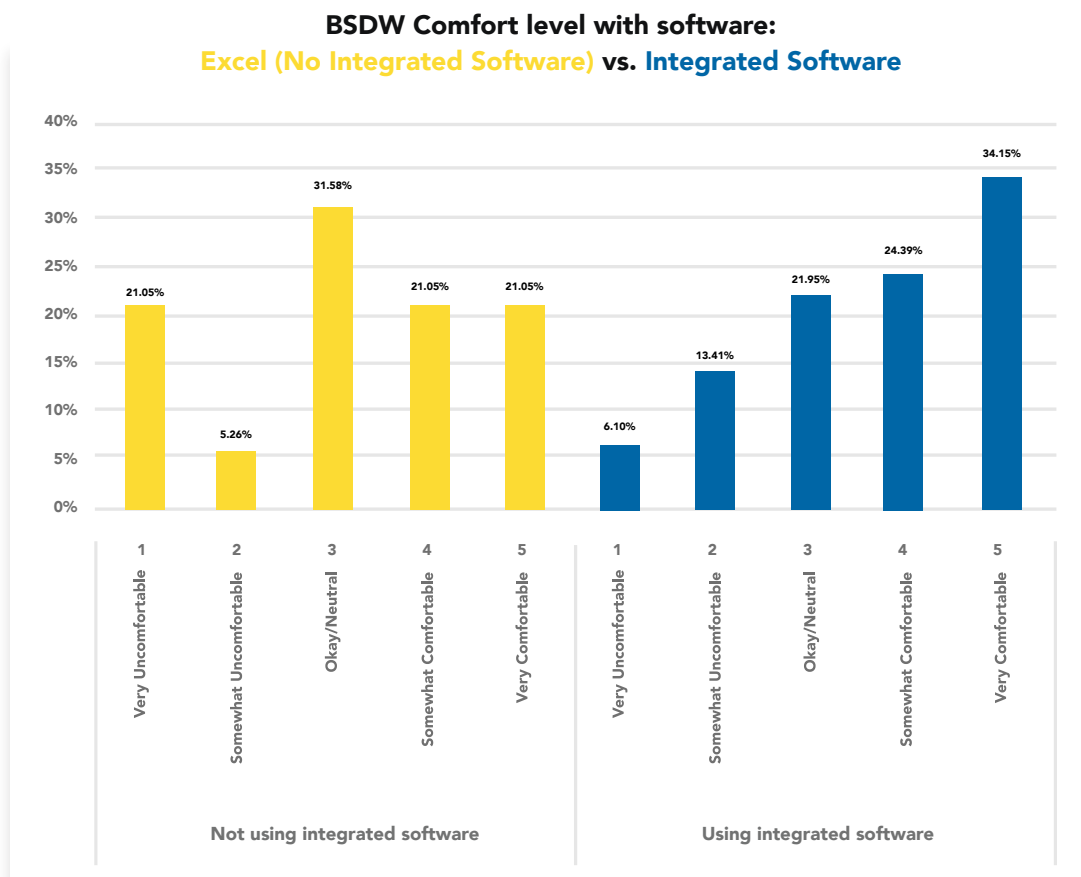
Figure 29:
*Most BSDWs are reasonably comfortable with the IA modules they use as a part of integrated software solutions. Question asked: "If you use software to help with Income Assistance reporting, how comfortable are you using this software? Please rate from 1 (negative, uncomfortable) to 5 (very comfortable, proficient)." (BC BSDW Survey 2020, n not using integrated software = 19, n using integrated software = 82).*

In order to further understand technology training needs, BSDWs were asked to rate common administrative and job-specific skills in terms of (a) importance to their role and (b) their personal proficiency. Figure 30 compares the importance of self-assessment of these skills across all BSDWs, demonstrating that data entry, spreadsheet and database use, and third-party software proficiency were among some of the biggest gaps[74], while data entry, MS Office applications, spreadsheets and accounting were seen as most important to the role of BSDW.


Skills importance and self-assessment

Legend:
- How skilled do you feel at this?
- How essential is this to your job?
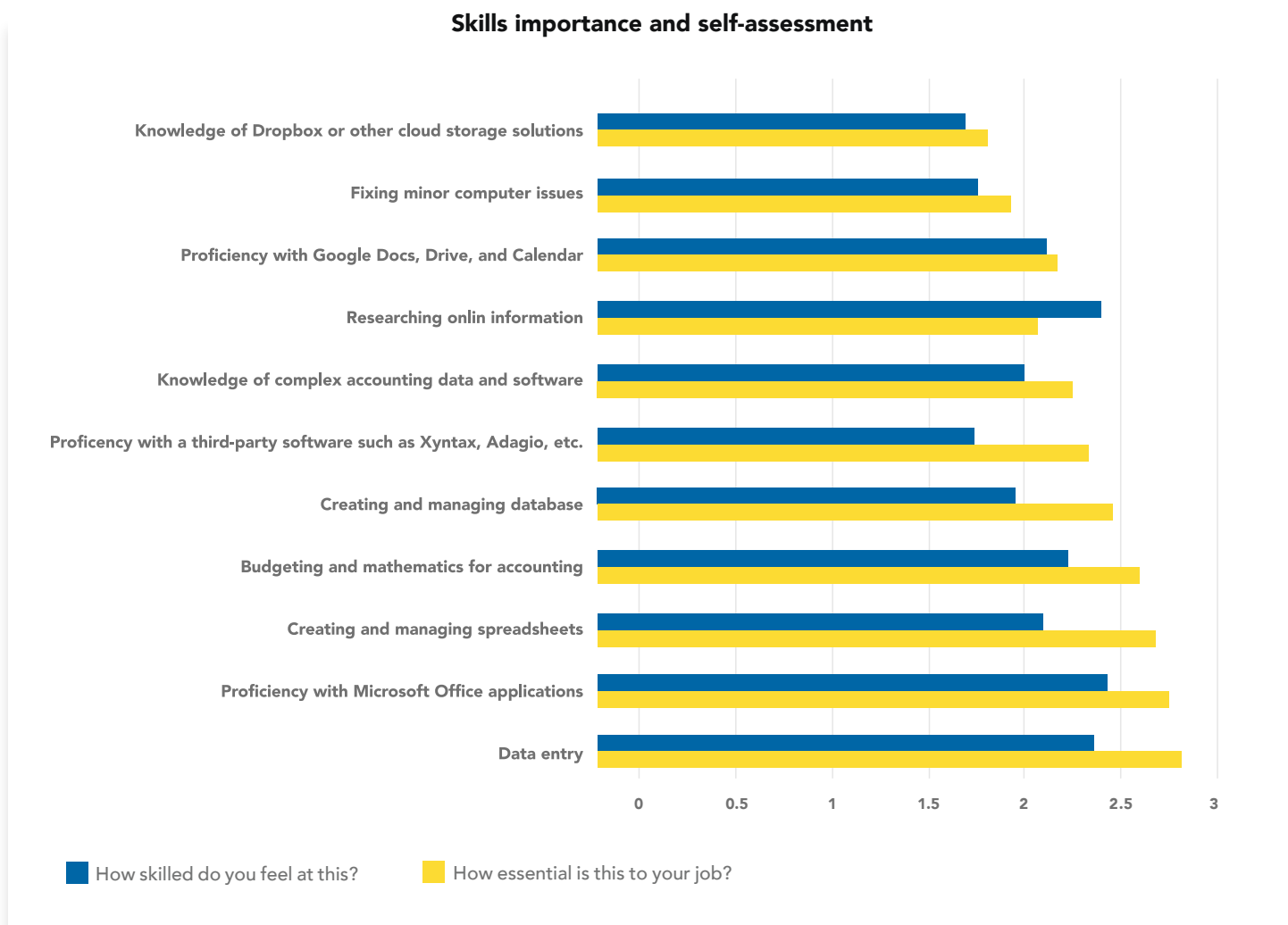
Figure 30:
Comparison between "level of skill" and level of importance to job, BC BSDW Survey 2020, n=112 to 116, depending on question. See footnote 68 for additional details on "proficiency with a third-party software" scores for those who use excel vs. those who use integrated software.

In the regional sessions, BSDWs also identified training topics that would be of interest to them. Computer literacy, MS Office (and particularly Excel); digital administration (such as file organization and access); budgeting and bookkeeping; and further integrated software training all made the list.

When and How Should Training be Held?

BSDWs were asked to identify their ideal location and format for training in an open-ended survey question. Figure 31 shows their categorized responses, and it is clear that there is a diversity of perspectives. While many respondents asked for out of community, hands-on/in-person training, a significant number asked instead for in-community training and online options.

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[74] It's important to note that this question was answered by both BSDWs who did and did not have integrated software. For those who did not have integrated software, mean proficiency score was 1.22, while this score was 2.0 for those with integrated software.

Desired format for technical skills training
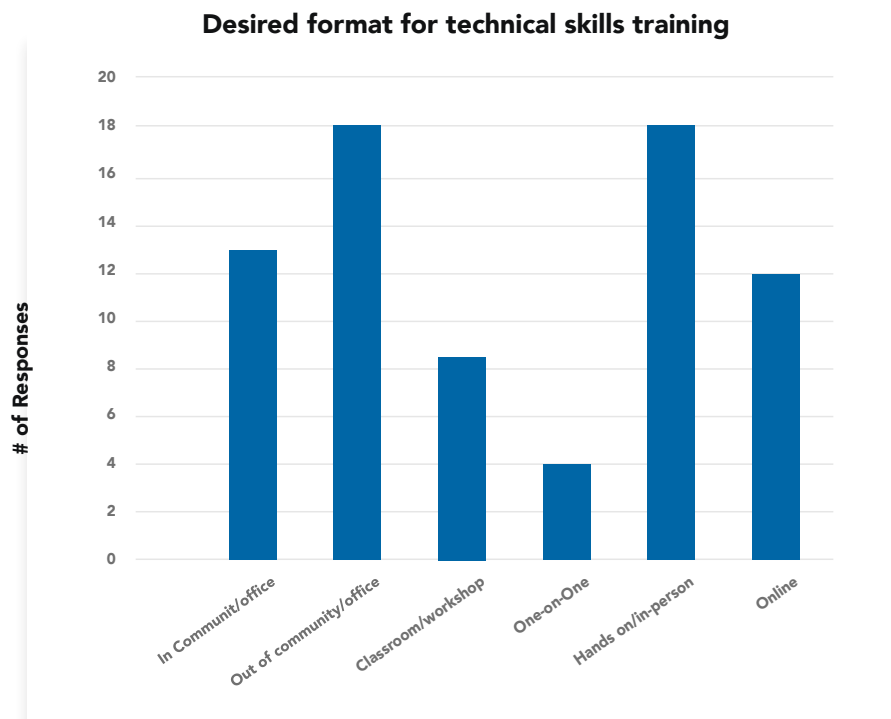
Figure 31: Desired format for technical skills training (BC BSDW Survey 2020, n = 73).

Nevertheless, these responses did show some commonalities. A commonly suggested duration was 2 days, though responses ranged from a few hours to a week. Respondents also requested that this training take place during regular working hours (i.e., should be paid).

Mentorship, Networking, and Support from other BSDWs

While BSDWs also acknowledged the role of formal support from BSDWs who had previously held their position, former BSDWs also provided "informal" training or advice for new entrants, as shown in Figure 32. Mentorship comprised a significant part of training for new BSDWs, with more than half of respondents noting that they had accessed such support.

The topic of mentorship also emerged at regional engagement sessions: for example, one BSDW (previously quoted) suggested that instead of doing compliance penalties, BSDWs with 100% compliance could be funded to go to their neighbours and provide them with support and training. Others commented on the importance of peer support in workplace development.

> *People currently doing trainings from ISC don't understand our jobs, they don't get all the complicated ways in which their policy is applied. That's why FNSDS was good, they knew the policy and the real-life application front to back. When ISC isn't able to answer my question, I'm afraid to make a decision because they know that they'll claw back money if I make the wrong move.*
>
> *- BSDW, Vancouver Regional Engagement Session*

**How or from whom did you receive informal training**
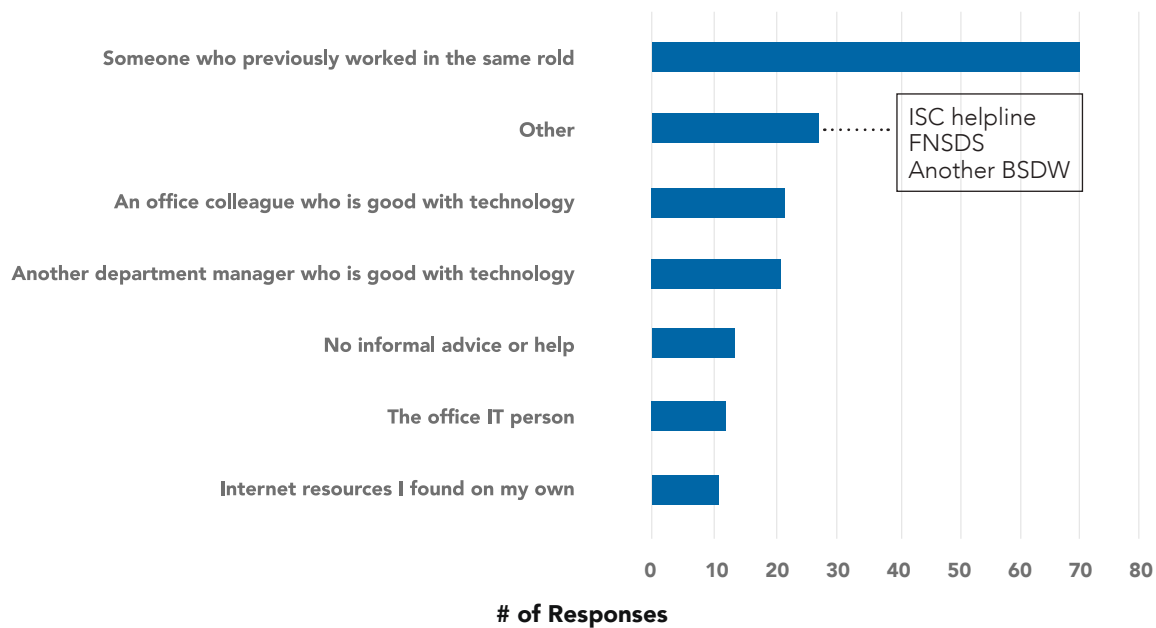
Figure 32: Breakdown of informal training delivery by source (BC BSDW Survey 2020, n = 117).

Furthermore, BSDWs in all sessions identified the importance of networking events and opportunities to speak to each other in order to foster self care and professional development. A huge theme from each regional engagement session was that the job of BSDW can be emotionally exhausting, with high turnover and burnout, as well as stressful interactions with clients and others.

There are three things you need to do this job: compassion, empathy, and thick skin.

- BSDW, Parksville Regional Engagement Session

A BSDW is also an employment counsellor, a financial counsellor, and a family counsellor.

- BSDW, Kelowna Regional Engagement Session

Accordingly, when asked to identify investment opportunities in one of the engagement session activities[75], many BSDWs talked about:
- Networking events with high-quality, client-focused training opportunities where BSDWs could connect, share advice, and regain energy.
- Wellness and mental health/self-care workshops for both BSDWs and their clients.
- Conflict resolution and grief counselling, as well as training in helping clients with disabilities or addictions.
- Support for management skills, leadership skills, and workplace confidence training.

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[75] Activity 3, World Café. See Appendix I: Research Methodology for details.

Valuing BSDW Work: The Link between Data and Respect

While the regional engagement sessions, BSDW Survey, and other research tools focused primarily on technology and data, numerous comments across all sessions and research tools drew a strong connection between data, reporting needs, and trust or respect. In other words, many BSDWs felt that there was a lack of transparency around what quarterly DCI reporting was for, a lack of trust in their work (reflected in disproportionate reporting burdens, lack of digitization, policy-oriented training rather than client-oriented training, etc.), and a level of oversight that seemed more designed to triple check their decisions than to collect data that could improve programs or services. BSDWs in this way echoed many of the critiques raised by academics writing on the topic of on-reserve income assistance (discussed earlier in this paper) that identified patterns of colonial policy in today's federal bureaucracy and reporting requirements. While the quarterly DCI states that its aim is planning and policy analysis, as in the quotation below, BSDWs commented that the data being collected from them did not seem to align with anything that would improve the quality of life for their clients and communities.

> *This report is required to provide statistics on the Income Assistance (IA) program expenditures, clients and their dependents. Indigenous Services Canada (ISC) uses the report for program planning and policy analysis, to determine statistical trends, to measure program performance and to ensure continuity of services in First Nations communities.*
>
> *- Indigenous Services Canada, Income Assistance Report, 255897A (2020-2021)[76]*

The following comments demonstrate the array of BSDW perspectives on this topic, emerging from different sources and events at different points in time:

> *What is the need for having all the client information on reports when the government has their info already? I think if we as BSDWs understand the why then it will be easier to transition to what is needed for reports*
>
> *- BSDW, open-ended survey response*

> *I don't like that we have to submit status numbers. It's like they don't trust our assessment of their status. All they need is no. of clients and amount spent, no. of dependants is irrelevant to ISC as it doesn't change the amount of money someone receives.*
>
> *- BSDW, Kelowna Regional Engagement Session*

> *Training meetings are very stressful, because they're auditing, so if they decide to claw back money they can. They read things in a way of saving the government money. You think you're in charge of a budget for IA and then all of a sudden someone is looking over your shoulder trying to pick apart everything you've done for a whole year.*
>
> *- BSDW, What We Heard Session 4*

Accordingly, one of the key takeaways from the regional sessions and many of the research tools is that software alone will not fix the problems that BSDWs encounter while administering income assistance. As illustrated in Appendix I (Regional Engagement Sessions), when asked to identify areas of investment

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[76] Accessed from https://www.sac-isc.gc.ca/DAM/DAM-ISC-SAC/DAM-TRNSPRCY/STAGING/texte-text/dci_2020_2021_455897A_ins_1575231720161_eng.pdf on October 7, 2020.

that would improve their roles, BSDWs frequently mentioned software as a key urgent investment, but also talked about training, networking, self-care opportunities, changes to reporting requirements, funding, support for their clients, and other topics fundamentally related to investing in BSDWs, their skills, and their communities rather than developing further investments in a burdensome reporting system. Indeed, Figure 33 is a word cloud representing all of the transcribed comments from BSDWs during the investment activity, and it is clear that while technology is on the periphery (likely more than it would otherwise be due to the sessions being heavily technology-focused), core priorities like clients, community, and training were mentioned with much greater frequency.

Figure 33: Word cloud of all comments written by BSDWs during regional engagement sessions in the Investment Strategy/World Café Activity (see Appendix I).

Central questions about the purposes of DCI data were not only raised by BSDWs, but also by software providers, some of whom articulated a certain degree of uncertainty about what some of the DCI questions were for and why the information they requested was necessary. In addition, BC Region ISC personnel could not speak to the federal headquarters' goals, or longer-term goals, for the data that DCIs collect, due to the scope of their roles. Nevertheless, as regional ISC personnel are likely to train and work with BSDWs via helplines and as they begin their roles, a clear articulation of the purpose of DCI data across the organization would help ensure that this information was also communicated to those responsible for administering IA.

Our job is working on processes and data, and you've got an org like ISC that puts together forms in terms of "here's the data we'd like to see," but thinking about "what do people have to do to get this data" is left out of the equation. There are still some fields in the DCIs where no-one has been able to explain to me why they're necessary, or what they're trying to do. If they understood the amount of work required to get the data and figure out the numbers that they're asking for, it just makes it… some of it's pretty ridiculous, to tell the truth.

It would be great if someone there could explain what they're thinking, how they use it, and we might be able to help in a whole bunch of different ways by providing a new perspective and presenting alternatives, things like 'you can get the same figure an easier way.' As long as I've been here there has never been that approach.

- Integrated Software Provider

It is clear that this type of communication and transparency has some urgency for BSDWs, and that the half-deployment of the 2019/2020 Quarterly DCI (DCI #455897, a long form with many requests for personal data) did some additional damage to many BSDWs' already tenuous trust in being asked to report for a good cause.

We used to have one-pagers in the 80s that didn't need all the stats they need now. They say that's how they figure out the funding for housing and stuff. But they've already got their formula figured out and it hasn't been changed in 35 years – they tell you that as a hoax.

– BSDW, Kelowna regional engagement session

Investing in IA Clients

In addition to the quotations above illustrating a lack of clarity about the purposes of DCIs, several BSDWs commented that they did not think that DCI data could be used to improve programs or services as currently designed. They noted that they had no ability to report matters that would help their clients given the current system, and that they ended up with various financial shortfalls (that had to be made up by other parts of a Nation's budget) and other challenges as a consequence.

> *Community Knowledge should be integrated into policies—BSDWs know what it takes for people to travel to get groceries, etc.*
>
> *-BSDW, Parksville Regional Engagement Session*

Among the challenges that BSDWs reported to the research team were challenges with existing programs, such as the pre-employment program, and requests for further investment in client programs for life skills, trades, health and wellness, and "work search readiness." Health and wellness was a significant theme, with BSDWs requesting extended care for clients recovering from addictions, wellness workshops, and healing workshops. Furthermore, BSDWs at numerous sessions requested improved support for clients with disabilities.

> *I'm the first generation not to go to Residential School. I'm slightly over 30 years old. Moving out of survival mode will take time.*
>
> *- BSDW, Parksville Regional Engagement Session*

In addition, across many of the regional sessions, BSDWs from all regions emphasized that shelter rates were often inadequate, particularly "in the winter months due to wood costs," and that there was "always not enough to cover from shelter to pay for clients' hydro bill/rent/wood/fuel" (BSDW, Prince George Regional Engagement Session). In one meeting where the research team was reporting back its findings, two BSDWs noted that they frequently had to cover shortfall in shelter amounts from other parts of their Nation's budget (What We Heard Session Four). Similarly, BSDWs in the Kelowna Regional Engagement Session called for increases to child support funding for relatives and single parents, while there was an overall request for greater on- and off-reserve equity in policy and resources.

At some regional engagement sessions, but particularly the session held on Vancouver Island (Parksville), BSDWs called for improvements to youth and Elder care and programming (as well as intergenerational programming that joined the two), but in a way that upheld cultural values. Youth programs were described as strength- and skill-building, with requests for programs that could build self-esteem, confidence, education, life skills through or in concert with on the land programs and workshops from Elders in traditional practices (e.g., building cedar canoes, drumming, singing, language skills, harvesting). Participants in the Parksville session also called for greater alignment of existing IA policy with cultural protocols, making comments such as "housing policy needs to be in line with our traditional family unit," and "invest in culture; invest in self-sustaining resources."

Conclusion and Recommendations

This report has focused on the roles and experiences of on-reserve BSDWs in the province of BC. Drawing from five in-person regional engagement sessions, a survey of BSDWs, and key informant interviews, along with ten virtual data validation sessions, it has focused on the technological tools that BSDWs use in their roles, contextualized by training needs and the broader scope of data collection and reporting instruments.

While BSDWs have a diversity of perspectives, situations, and needs, several clear recommendations have emerged from this report's extensive primary research. Many of these recommendations align with the priorities identified by BSDWs at each regional session's investment strategy activity (see Appendix I, "Regional Engagement Sessions"), are complemented by data from the BSDW survey, and were further discussed and refined during report-back and data validation sessions (see Appendix I, "Regional Coordinators and What We Heard Workshops").

Several of the below recommendations are interrelated, as they pertain to activities that could be effectively and respectfully run by a BSDW-led organization. Accordingly, recommendations marked with an asterisk* pertain to recommendation 1A for a BSDW industry association in BC. This report recommends the following investments and evaluations, run in coordination with BSDWs and BSDW-led organizations.

1. Training and Networking

> *There is no manual – [we] require consistent training - a new SA starts from square 1 and learns on own and by making mistakes/failing audits (hard on employee/community and staff turnover)*
>
> *- Parksville Regional Engagement Session, written comment*

> *Hands on training is good. When I started working in this position I had a half day of training, then took on 10 clients. With reporting, I trained myself and developed my own system. I created excel spreadsheets to summarize the reporting. We don't have adequate software, funding, or training.*
>
> *- What We Heard Session 7*

Relevant findings: BSDWs identify a lack of training as the single biggest barrier to being able to complete their work. The lack of an advocacy organization was identified as the second biggest barrier. Half of BSDWs experienced a day or less of formal training. BSDWs voice a desire to see more hands-on policy training, more consistent communications and helpdesk services, and a variety of technical skills training. As the average age of a new BSDW is 44, it is important to be mindful of computer literacy training during onboarding. In addition, networking and professional development was a significant theme in the regional engagement sessions, with BSDWs making it clear that training should extend to client support, wellness workshops, leadership skills training, and other important development opportunities.

Recommendations:

a. *Provide funding for a BSDW-led association that can offer training, substitutes and job supports for BSDWs who need to take leave, can provide ongoing mentorship, knowledge gathering, advocacy, and hold events for sharing information and advice among peers.

b. Offer a comprehensive and consistent onboarding package for every new BSDW, including an introduction to the departments they will be interacting with, key contacts, and an overview of reporting requirements, policies, and guidelines. Ensure that onboarding is inclusive with respect to variation in computer literacy.

c. *Offer enhanced support in cases where BSDWs do not have trained backup staff to allow them to attend training, go on holiday, or take sick leave. This may include additional funding for BSDWs with high workloads but little support to help them hire support staff.

d. *Offer a variety of training options, including online, in-person, and in/out of community, with a 2-day workshop length and travel time for out of community events. Be mindful of cheque runs and reporting timelines when scheduling new events.

e. Ensure that policy training is more hands-on and interactive than delivery of a new DCI's "policy book."

f. Improve ISC helplines to standardize messaging from personnel. Adopt a case management system where BSDWs can track and confirm decisions or advice they have received so that BSDWs have recourse to a paper trail if they receive two different responses.

g. Pursue proactive communication for upcoming and new policy or DCI changes. Notify both BSDWs and IA module providers (integrated software providers) ahead of DCI changes in order for the latter to make timely software updates.

h. *Ensure that all communities, including Nations with contemporary treaties, receive pertinent communications about updates and training as their systems may be modeled after the province's.

i. *Offer annual networking events with BSDW-proposed mentorship and training opportunities, such as professional development for client support, working with clients with disabilities, etc.

2. Data, Transparency, and Respect

> *The stats were pointless as the families with 2, 3, 4 children, they all get the same amount for basic, and what little change in shelter amounts; what did it matter on stats for dependents. The breakdowns of employables, pwds, ppmbs, it all was time consuming.*
>
> *- Survey, Open Ended Response*

> *When you do the quarterly they go by the last month's data. Why are we reporting April and May if they only look at June for their figures?*
>
> *- Kelowna Regional Engagement Session.*

> *I haven't noticed DCI's changing much as they are still asking for the same information. I recommend they provide updates and changes. It seems like they do not want new stats. There are other trends that can be followed which would also be helpful. For example, there is a lack of transportation, etc. I am unsure if they are keeping track of this type of data.*
>
> *- What We Heard Session 1*

Relevant findings: Most parties involved in on-reserve IA administration do not understand the long-term goals of DCI data collection. BDSWs and some software providers agree that the reports request information that is extraneous and would not help to improve programs and services. Some BSDWs feel that the only purpose of the DCI is to monitor compliance, which does not support a feeling of fulfilment in their role, particularly the parts containing significant data entry and duplication of labour. Furthermore, some BSDWs voiced concerns about client rights to privacy. In addition, some BSDWs identified issues with programs designed to support clients (such as shelter rates) that they are not currently able to communicate to ISC in any formal capacity.

Recommendations:

a. Assess the use to which data collected via IA DCIs has been put, with a view to reducing non-essential data.
b. Clarify this purpose to BSDWs, ISC personnel working with BSDWs, and other relevant stakeholders.
c. *Consider evaluating the purpose of and need for each DCI question, along with BSDWs. Consult with BSDWs and, where relevant, IA software providers to understand the least burdensome way to obtain needed data. Include a review of OCAP® commitments in such an evaluation.
d. *Provide a channel of communication through which BSDWs can comment on the impact of IA programs in their community: for example on the success of pre-employment programs, the adequacy of shelter rates seasonally, the cultural appropriateness of particular programs, or where they are experiencing shortfall.
e. Act upon the recommendations of BSDWs for improving IA programs in their communities.

3. Communication and Reporting Tools

It would be nice if there was reporting help on statistics… All data is scattered everywhere. It would be nice to have everything in one place.

- What We Heard Session 1

Venn generates all of our reports, but the DCI doesn't accept it even though it is word-for-word the same.

- Kelowna Regional Engagement Session.

When I was a Band Manager our computer system was through satellite. It worked depending on the weather. Do you work with satellite systems and delivery? If it was cloudy we couldn't access our programs.

- What We Heard Session 6

Relevant findings: DCIs are sometimes lost in the submission process, with potential ramifications for compliance, funding, and duplication of labour. In addition, it is difficult for some BSDWs to find out about their compliance status promptly and clearly. Some BSDWs referenced a portal for this purpose, others did not know about it, yet others knew about it but did not find it navigable. DCIs in the form of Adobe PDFs were found to be unprogrammable by software providers, who instead produced facsimile forms or excel versions for manual transfer. Due to this, BSDWs and, sometimes, ISC personnel were left with data entry duplication of labour. Finally, there is a significant range of internet access in BC, with some BSDWs experiencing slow internet as a significant barrier to being able to do their work.

Recommendations:
a. Create a central digital location for BSDWs to access forms, request information, and check on their compliance status and the reasons for non-compliance, where applicable.
b. Provide submission receipts when DCIs are received.
c. *Ensure that knowledge of digital location for BSDWs to check compliance and access forms is broadly disseminated in a variety of ways to all BSDWs in BC.
d. Replace Adobe PDF DCIs with a programmable alternative, in a way that does not create barriers for communities that do not yet have access to integrated software. *Consult BSDWs and software providers on the optimal format (Excel, XML, or other).
e. Invest in broadband connectivity infrastructure for rural, remote, and Indigenous communities across BC.

4. Software Tools

> *having all bands in BC working with ONE computer software to standardize service delivery.*
>
> *– Survey, open-ended response*

> *We used to use Excel, then switched to Xyntax and it is a lot easier. You just put the information into the database, push the button and then its done.*
>
> *– What We Heard Session 1*

> *I think we should have funding to access the technology we want, and what works for our Nation.*
>
> *- What We Heard Session 4*

Relevant findings: A third of BSDWs in BC lack access to integrated software tools to assist them with documentation and reporting. These tools appear to save time and ease workload. BSDWs have different perspectives on whether a universal integrated software tool (and universal client database) for all BSDWs would be helpful or cause unnecessary burden for Nations with existing systems. However, many BSDWs did voice frustration with the necessity of keeping hard-copy records of their files, and commented that on-reserve IA administration would be less burdensome with less paperwork. Finally, not all BSDWs are aware of the variety of IA modules available, including their features, fee structures, and training or helpdesk models.

Recommendations:
a. Provide grant funding for Nations who are not currently using an IA module to access and adopt one, in conjunction with other departments (such as Finance) when appropriate. Ensure that Nations without the means to access software automatically qualify for and receive such funding, rather than using an application-based system that may add barriers to entry.
b. *If any universal software or database is proposed or adopted, pursue consultation with Nations to minimize the issue of lack of integration with existing, functioning, systems. Consider an opt-in approach to any such policy.
c. Regardless of the adoption of a universal client database, move on-reserve IA towards digitization: for example, by not mandating hard copy record-keeping.
d. *Offer a central source of information where BSDWs and other Nation administrators can compare software features, fee structures, the variety of modules offered, and training or helpdesk modules. Consider providing this mandate (and resources for it) to a BSDW-led organization.

5. Hardware Tools

> *It is a challenge using an old computer which can be slow or crash and lose files*
>
> *– Survey, open-ended response*

> *[We need a] buzzer system at reception to let people calm down before they come see the SDW.*
>
> *– BSDW, Vancouver Regional Engagement Session*

If INAC expects us to be their administrators they should support us with money for storage, hardware, and training.

Relevant findings: Some BSDWs have old and slow computers, or lack other tools such as printers, scanners, and fax machines. It is important for BSDWs to be able to print, scan, and fax client documents in a private space rather than a shared office space. In addition, some BSDWs identified technology and hardware related to workplace safety that would be an asset at work.

Recommendations:

a. Provide funding on an ongoing basis for necessary administrative and office supplies for BSDWs.
b. Provide funding on an ongoing basis for necessary safety technology for BSDWs.
c. *Ensure that knowledge of funding opportunities is broadly disseminated in a variety of ways to all BSDWs in BC

Appendix I: Research Methodology

Research Framework

The primary objectives of this study were to understand the impact of technology on BSDWs' roles in British Columbia, while identifying investments that would improve BSDWs roles through technology, infrastructure, or training. In addition, the study sought to understand the areas of investment that would have the highest return for BSDWs, how those investments could be effectively designed and implemented, and how this report could respect and articulate findings that uphold First Nation self-governance, values, and principles.

The study team broke the above objectives down into twelve large research questions and mapped primary and secondary research tools to them in order to ensure that each question was being investigated.

Primary Research

Survey

The BSDW Survey was designed to fulfil key criteria of the research framework (described above). During the regional sessions, the survey was delivered in two parts: a "pre-survey" where BSDWs were asked to run an internet speed test from their workstations, and a "full survey" delivered during the regional sessions. Following the completion of all regional sessions, when all respondents would be taking the survey from their workplaces or homes with regard to internet speed assessments, the "pre-survey" was added to the rest of the questionnaire and delivered via email as well as via the Technology Council's regional coordinator network. Further, the language used in survey questions varied slightly depending on when the survey was sent (e.g., a later version of the survey included an additional multiple-choice software option when BSDWs identified one that was missing, and a question about ideal location of training was added to the questionnaire).

Across 153 distinct responses, 139 of the 203 bands in BC (68.5%) were represented in the survey. An additional 17 respondents took the internet speed test only but never completed the full questionnaire: accordingly, their responses have been included in the speed test analysis but do not appear elsewhere in the report. Many survey questions were optional, meaning that respondents sometimes skipped questions. The mean respondent completed 81.5% of the survey. This means that the sample size (n) varies from question to question. For reference, for a population of 203, a sample size of 138 would be needed to assume 90% confidence and a +/- 4% margin of error.

A few approaches were adopted to manage multiple responses from the same respondents. Where possible, duplicate responses were merged to ensure that data was as complete as possible. Otherwise, the response with the lower completion rate was removed from the analysis.

This report summarizes descriptive data of a sample of 68.5% of all BSDWs in BC. Due to item nonresponse and the relatively small number of BSDWs, the relationships summarized here shouldn't be considered statistically significant, and are not necessarily applicable to people in similar roles outside of BC, unless noted otherwise.

Regional Sessions

Five regional engagement sessions were held to gather feedback from BSDWs in a location close to their home. These were held in Prince George, Kelowna, Parksville, Prince Rupert, and Vancouver, from late November 2019 to late February 2020. Each session was two days long, and featured participatory research exercises designed by facilitator Chris Corrigan and the Technology Council research team.

Each session began with icebreaker-style activities and a presentation from the research team that discussed the project's goals and timeline. Following this presentation, the research team and all BSDWs in attendance proceeded with the following three participatory research exercises.

Day 1 Activity 1: Software for Reporting: Pros and Cons
At each session, BSDWs were asked to form groups based on the software solutions they used at work (with one to two groups dedicated to Microsoft Excel & paper if they did not use a different reporting software) and list shared pros and cons on chart paper on the walls. Following the brainstorming session, each group reported back to the room.

While each of the regional sessions had at least one group that formed around Microsoft Excel and Xyntax, there were a variety of other software solutions represented, depending on the region. AIS (formerly Aboriginal Information Systems); Adagio and Paydirt; and Venn software were all represented in more than one session, while several other solutions only appeared at one of the regional sessions. For some, such as Abenaki, this may have been because the product is an out-of-province solution. Others, such as TIFIS, were proprietary and custom solutions built by particular Nations, while others (Tribal and Unification) were older solutions that many bands have transitioned away from.

Day 1 Activity 2: Process Mapping and Tagging
In the process mapping activity, BSDWs took turns interviewing each-other and writing down their workflow, from client intake to reporting. Participants then "coded" each step in their workflow with tags: Technology (T) Pain Point (P) Bottleneck or Delay (B/D) and, in some of the sessions, Helpful (H) or Reporting (R). In order to make a meaningful and concise summary of participant workflow, the study team came up with 8 broad steps that broadly encompass all workflow steps identified by BSDWs during sessions.

Day 1 Final Activity: BSDW Survey
At the end of Day 1, BSDWs present at the regional sessions completed the BSDW Survey. They used study team laptops or their own computers or phones, with hard copies available to those who requested them.

Day 2 Activity 1: Designing an Investment Strategy World Café

In this Day 2 activity, participants were asked to consider what investments would improve their roles as BSDWs. Participants began by brainstorming as groups, with each member of a table given a pen and asked to write their notes/thoughts on the paper tablecloth. Groups of four were asked to come up with a consensus on three key themes/findings from their conversation, and then the whole room collectively grouped their comments around common categories (e.g., if more than one table had a "training"-related comment, they would group theirs together).

Analysis of Activity 3 involved two types of categories:

Participant-generated Themes: Key terms and categories generated by participants in the activity described above.
Researcher-generated Themes: Following the dataset's transcription, a set of categories attributed by researchers in an independent coding exercise based on tablecloth notes as well as larger themes.

Both of these analytical categories are central to the summary that follows for each session. Participant-generated themes illustrate **consensus-based priorities** determined at each regional session. Researcher-generated themes seek to present a more **granular summary** of all comments made, including those that were left out of the "top three priority"-determining phase of the activity. This analysis treats all regions separately in order to highlight the similarities and differences between the priorities determined by each group.

The priorities identified by participants are used throughout the report—they help establish key findings to be included. A summary of the priorities from each session, both from participant-assigned themes and researcher-assigned themes, is below.

Summary Table 1: Top Investment by Regional Session (from Participant-Assigned Categories)
Reflects: Consensus-based priorities, urgent topics to address.

	Top 3 Consensus-Based Priorities
Prince George	**Training, Self Care, Reporting**
Kelowna	**Universal Systems, Software, Training**
Parksville	**Investment, Networking, Training**
Prince Rupert	**Training, Client Supports, Software/Policies/Safety [tied for third]**
Vancouver	**Software/Data System, Training, Funding**

Summary Table 2: Top Investment Priorities by Regional Session (from Researcher-Assigned Categories)
Reflects: Priority by number of comments made (whether or not selected at end of activity as core "theme"), underlying topics to address.

	Short-Term	**Medium-Term**	**Long-Term**
Prince George	Funding for local IA Departments (staff, space, salary, tools)	Self-care and Professional development opportunities	Income Assistance Policy-related Changes
Kelowna	Reporting Changes	Policy and DCI-related Training	Income Assistance Policy-related Changes
Parksville	Funding for local IA departments	Support, programs, and training for Clients	Respect & Cultural Resillience
Prince Rupert	Reporting Changes	Policy and DCI-related Training	Inter-Community Equality & Distinctiveness
Vancouver	Funding for local IA departments	Support, programs, and training for Clients	Inter-Community Equality & Distinctiveness

Day 2 Activity 2: "Data Party" and Survey Report Back Session
At the end of Day 2, the study team presented early findings from that region's survey (e.g., years of experience, DCIs used, time spent compiling DCIs, and other aggregate results). BSDWs were given paper copies of the slide deck with aggregate qualitative and quantitative findings to consider and write on in groups of two to four. BSDW feedback on early findings were considered when presenting survey data in the final report. As one example, BSDWs in the Kelowna regional engagement session noted that caseload should not be titled "workload" due to a marked inconsistency in workload per client: this and similar qualitative findings are incorporated throughout to inform the data's final presentation.

Key Informant Interviews

The research team held seven semi-structured interviews: five with personnel who provided an IA module as part of an integrated software solution and worked closely with BSDWs, two with regional ISC personnel. All interviews were anonymous and approximately one hour in length. Topics for software providers included: user experience, hardware needs, training and helpdesk provisions, ability to populate DCIs, experiences working with BSDWs, experiences working with ISC, backup and connectivity, and the impact of COVID-19. Topics for ISC personnel included: current DCIs, DCI changes, training and helpdesk provisions, experiences working with BSDWs, and experience working with software providers.

Reporting Back: Regional Coordinators and "What We Heard" Workshops

Following the onset of the COVID-19 pandemic in March 2020, a network of regional coordinators was hired to pursue ongoing community outreach and networking in place of the research team traveling to particular communities. Regional coordinators assisted with the study in numerous ways, including with survey dissemination, report-back, and organizing "What We Heard" workshops. These workshops were held virtually, one in each region, and BSDWs were invited to attend and hear the study team present on findings and recommendations. They occurred in September and early October 2020. A recording was made for BSDWs who were not able to attend, with the option of submitting feedback in writing. Following the "What We Heard" workshops, the research team considered BSDW commentary and notes and incorporated these into the study findings.

BSDWs and Regional Coordinators involved in the 10 "What We Heard" sessions provided a range of feedback regarding project findings and proposed recommendations. They are arranged here in relation to the three discussions held in each session, categorized by short-, medium-, and long-term findings and recommendations.

Short-term findings (Software, Hardware, Reporting)

Several participants noted that the findings presented here were consistent with what they see at their work: BSDWs often use excel, and would like to use other software. Some participants said that they found excel difficult to use, and several suggested that software made their work easier. Still, comments about software were both positive and negative, with questions about their solutions' compatibility with government software and other band departments, as well as steep learning curves.

Several participants noted frustrations related to First Nations receiving the same IA software as non-first Nations. There was general agreement that funding would be a good way to ensure that more First Nations could access software. At the same time, one individual noted a preference for consistent funding for reporting rather than one-off project-based funding. Another individual suggested that costs associated with hardware and software needs should be shared openly. It was suggested once that trials of available software would allow First Nations to make software purchase decisions more easily. Finally, there was some concern that paying attention to software (or shorter-term solutions) would yield minimal benefit without attention to things like internet connectivity (or longer-term solutions).

Medium-term findings (Training, Networking, Communication)

Many participants agreed that more training would make the work of BSDWs easier. Training topics of concern included reporting changes, technology training, and mental health and wellness for BSDWs and clients. The desired format of training varied, but many individuals supported online training, particularly due to COVID. Another participant suggested that significant training needs were in part due to high turnover in the position. Others also brought up the stress of the position – including that training itself can be stressful – and the merits of training and support for mental health and wellness.

Communication between stakeholders was not an issue brought up by many participants, though some highlighted a need for networking, with a number of participants referring to the services formerly provided by the FNSDS. Participants expressed need for more information regarding reporting changes and statistics, and more support for both works and clients. One participant noted that a consistent database for BSDWs to use would be beneficial.

Long-term findings (Internet Connectivity, Inequitable Access to Resources)
Some participants agreed that certain Nations face greater challenges than others in terms of income assistance. These differences were further echoed by a divide between participants who suggested that internet connectivity was a major challenge (with one mentioning that only 10% of houses on their reserve had internet), while others suggested that connectivity was never an issue.

There was an agreed desire for transparency from ISC in terms of data collection, as well as many mentions of long delays waiting for forms, hearing from other departments, and hearing from the Canadian government. A few comments highlighted that the narrow scope of BSDW technology use is only a portion of what is a complex issue: for example, staff turnover was brought up as a repeated challenge, and one participant suggested that funding on its own was an inadequate solution. A few participants noted the challenges that would arise from implementing new software on a large scale.

Secondary Research

A secondary review of literature and data examined key contextual data, including previous reports on on-reserve income assistance such as the 2007 *Evaluation of the Income Assistance Program*, the 2016 *Joint Evaluation of the On-Reserve Income Assistance Reform*, and the 2018 *Evaluation of the On-Reserve Income Assistance Program*. The review also examined secondary data on on-reserve income assistance where relevant, in conjunction with academic and grey literature, as well as First Nations and First Nations organizations websites and publications.