

SERVICE CANADA

FRONTLINE REPORT

IN PARTNERSHIP WITH THE ESDC INNOVATION LAB



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EXECUTIVE SUMMARY

Chapter

00



EXECUTIVE SUMMARY

In April 2020, the ESDC Innovation Lab took action to assist in the recovery phase of the pandemic by gaining the perspective of frontline employees, believing that they are the best-placed resource to help inform ESDC to rethink how it connects to the public. Our objective in conducting the Service Canada Frontline Engagement Initiative was to bring forward regional and frontline data-driven perspectives to inform communication to Canadians, tailored program interventions, and future service delivery. To ensure the project reached frontline staff across Canada, the Lab created the Regional Champions' Network (RCN) composed of 60 regional staff, team leads, and managers.

This report summarizes the findings of the initiative and offers 12 insights for how service delivery can better respond to clients needs during the pandemic and beyond. Based on these insights the Lab proposes nine solutions to address challenges for service delivery in four thematic areas: client needs, internal and external communication, work environment, and employee well-being.

FINDINGS AND PROPOSED SOLUTIONS

With the help of the RCN, the Lab engaged over 150 frontline colleagues nation-wide, executed 17 focus groups, and conducted over 25 semi-structured interviews. Data was gathered from five key service delivery business lines: Citizen Service Officers, Citizen Service Specialists, Processing Agents, Call Center Agents, and Business Expertise Consultants.

Data from respondents revealed 12 insights for how service delivery can better respond to clients' needs during the pandemic and beyond in six thematic areas: client needs, internal and external communication, work environment, training, employee well-being, and technology. Based on these insights the Lab proposes nine solutions to address challenges for service delivery in four thematic areas: client needs, internal and external communication, work environment, and employee well-being.

EXECUTIVE SUMMARY

CLIENT NEEDS

- Insight 1: There are groups of underrepresented populations that feel they are not adequately served by the government and struggle to have their needs met.
- Insight 2: Clients expect integrated services with real time application status updates.
- Insight 3: Application information (e.g. for EI) is complex and frequently changing. It is difficult to access clear, easy to understand, and step-by-step process information.

INTERNAL AND EXTERNAL COMMUNICATION

- Insight 4: ESDC websites are difficult for clients to navigate and find up-to-date information to apply for benefits and services.
- insight 5: Staff cannot keep up with the flow of information and procedural updates that they receive from multiple sources

WORKING ENVIRONMENT

- Insight 6: Employees need flexible work arrangements to be at their best and manage work and home life balance during the pandemic.
- Insight 7: Collected call-tracking data is not detailed enough to pinpoint and resolve unnecessary causes of call volumes.

EXECUTIVE SUMMARY

TRAINING

- Insight 8: Frontline staff feel that not enough time/resources have been invested in training during the pandemic, to the detriment of service quality and staff morale.

WELL-BEING

- Insight 9: Staff feel abandoned by upper management and blindsided when they do not receive crucial information about new/changed programs in a timely manner. As a result, they often take verbal abuse and feel guilty and frustrated when they cannot answer client questions.
- Insight 10: Staff do not have enough allotted off-call time to allow for recovery after high distress calls or to do necessary after-call work for new or complex situations.
- Insight 11: Call centre specialists' current performance metrics do not align with the changing reality of the work.

TECHNOLOGY

- Insight 12: A lack of adequate equipment and resources has contributed to the challenge of adjusting to a work from home environment.

EXECUTIVE SUMMARY

PROPOSED SOLUTIONS

The following nine proposed solutions are recommended for further co-development and testing for scalability based on the strong support by the research data and feedback from staff.

THEMES	PROPOSED SOLUTIONS
Client Needs	<ul style="list-style-type: none">· Employment Insurance application guide· Online claim status· Community navigators
Internal and External Communication	<ul style="list-style-type: none">· Social media with increased reach· Online bot/personal assistant· Internal communications portal
Working Environment	<ul style="list-style-type: none">· Social media with increased reach· Online bot/personal assistant
Well-Being	<ul style="list-style-type: none">· Social media with increased reach

EXECUTIVE SUMMARY

NEXT STEPS

The findings from the Service Canada Frontline Engagement Initiative give us access to crucial data-driven frontline perspectives during the pandemic. The data gathered in this project is invaluable information that could inform planning in communications, program interventions, and service delivery. As such, the Lab's dissemination strategy aims to make the findings as accessible as possible throughout the regions and NHQ. Findings will be available on various ESDC online platforms; as well, the Lab will seek out opportunities to present findings to regional staff and NHQ strategic service delivery area teams.

As the Lab disseminates findings, scoping for a second phase is underway. Phase two of the project seeks to build upon the momentum and success of phase one by identifying which of the nine proposed solutions are feasible for further development to improve service delivery during the pandemic and beyond. The second phase will continue to engage frontline staff from coast to coast who were essential to the project's initial success. The Lab will also seek opportunities for collaboration to build synergies with related initiatives in the department.

BACKGROUND

Chapter

01



BACKGROUND

IMPROVING INTERNAL PROCESSES

The current pandemic caused ESDC and Service Canada to fundamentally shift and adapt to serve Canadians. Our regional colleagues working on frontline service delivery have faced unprecedented realities during the pandemic yet their role is more critical than ever amid overwhelming service demand. In April 2020, the ESDC Innovation Lab took action to assist in the recovery phase of the pandemic by gaining the perspective of frontline employees, believing that they are the best-placed resource to help inform ESDC to rethink how it connects to the public. Our objective was to bring forward regional and frontline perspectives (data and key insights) to inform communication to Canadians, tailored program interventions, and future service delivery. We reached out to 60 regional colleagues to kick-start what would become the Service Canada Frontline Engagement Initiative.

HOW WE CAME TOGETHER

This project began as a grassroots initiative bringing together a multitude of Lab skillsets including quantitative and qualitative data collection and analysis, design thinking, systems thinking, organizational design and behavioral insights. We focused on a bottom-up and horizontal approach for project logistics, activities, and validation. Although we engaged with senior management during the project, we wanted to equip and empower staff to brief on the initiative. To this end we:

- Created the Regional Champions' Network made up of 60 regional colleagues and frontline managers who helped us consult frontline employees from coast to coast, supported our project activities, validated research insights, and briefed their senior management on key milestones.
- Engaged with over 150 staff with the help of the network. This included focus groups and interviews with frontline staff, team leads, and managers from various service-focused business lines (Citizen Service Officers, Citizen Service Specialists, Processing Agents, Call Center Agents, and Business Expertise Consultants).
- Connected with NHQ strategic service delivery areas (Citizen Services Branch and the Benefits Delivery Services Branch) to inform and stay informed of strategic and top-down recovery efforts.

TIMELINE



PROJECT BY THE NUMBERS

60

regional frontline staff engaged as part of the Regional Change Network.

17

focus groups conducted in June and July across 4 regions with 5 service delivery business lines.

25+

semi-structured interviews with working level staff, managers, and team leads.

9

proposed solutions co-developed through gathered insights.

86

respondents who provided survey feedback to assess proposed solutions.

150+

regional staff coast to coast engaged over the course of the project

CO-DEVELOPMENT AND VALIDATION

Our initial exploratory approach consisted of reaching out to select frontline colleagues to understand whether the pandemic had added elements of complexity to their work. As we virtually met with colleagues from coast to coast, it was evident that internal and external factors had created challenges for serving Canadians. To solicit support and input, we then reached out to senior management from National Headquarters and all four Regions in the Citizen Services and the Benefits Delivery branches, who provided us with employees to participate in the Regional Champions Network.

DATA COLLECTION

Focus groups were held with regional, frontline staff from five business lines (Citizen Service Officers, Citizen Service Specialists, Processing Agents, Call Center Agents, and Business Expertise Consultants). These were small group discussions aimed at understanding their perspectives about preparedness for the transition to working from home, client experiences, service delivery challenges, and strategies to address immediate workload/service delivery needs.

IDEATION SPRINTS

Several workshops were held with 10 to 15 frontline staff to present and validate findings from the focus groups and semi-structured interviews. Based on the findings, participants generated ideas for possible solutions to address the challenges we identified for service delivery.

LAB'S VALUE PROPOSITION

The Lab uses the design-thinking process to capture stories and experiences and generate solutions directly with those impacted by policies, programs and services. This time, we shifted focus towards the Department's own employees to capture real-time experiences, challenges and opportunities from the frontline service delivery perspective. By analyzing common themes, trends, and behaviours, we hope that this information can serve to:

- Provide relevant information to various parts of the department of service, program, and policy regarding challenges and barriers identified by Canadians and our frontline. For example, identifying vulnerable populations that may not be served by current policy or programming or understanding how unemployed Canadians are making return-to-work decisions.
- Provide timely information to the Department when implementing new processes and parameters for employees to continue their work from home or the office.
- Generate ideas and potential solutions for frontline staff during emergencies and the future of work during the recovery phase.
- Provide clients better service delivery by ensuring frontline staff are equipped with appropriate information, supports and systems.
- Support Service Canada in establishing new ways or protocols when responding to emergency or crisis situations in the future.

INSIGHTS AND IDEATION DEVELOPMENT

Chapter

02



INSIGHTS AND IDEATION DEVELOPMENT

The evidence we gathered from interviews and focus groups was analyzed and categorized into themes that identify service delivery challenges. These themes were used to inform the development of proposed solutions during our design sprints. Once the proposed solutions were developed, we further validated them with over 150 regional staff via a feedback survey to ensure they resonated with staff. We received 86 responses to our feedback survey.

The next section presents six themes that emerged from the data we analyzed including:

- Client needs
- External and internal communication
- Work Environment
- Training
- Staff Well-Being
- Technology

For each of these six themes we outline key insights (challenges for service delivery) that emerged under each theme. Each insight is coupled with a “How Might We” question that reframes the key challenge. How Might We questions help to launch a brainstorm for a wide range of solutions as part of the design thinking process that focuses on idea generation. These questions were used as prompts during our workshops with frontline staff to help develop proposed solutions. Following the insights, we present the set of proposed solutions that were developed to address the insights under each key theme.

DEFINING INSIGHTS...

Define is unpacking and synthesizing our findings, breaking a concept down in order to understand it. Develop an actionable problem statement that has a focus on the specific users, insights, and needs uncovered.

- How: Assume a solution exists.
- Might: The process is free of judgement.
- We: We will come up with the solutions together.

IDEATION...

Generate radical design alternatives. Drive out the obvious solutions and harness collective perspectives to further uncover unexpected areas of exploration. To defer judgment and create more options, the lab utilizes how might we statements as a springboard for creative problem solving.

CLIENT NEEDS



Chapter

03

INSIGHT 1

There are groups of underrepresented populations that feel underserved from the government and struggle to have their needs met.

HOW MIGHT WE

ensure that underrepresented segments of the population are aware of and have access to eligible programs and services?

Citizen Service Specialists (CSSs) who provide critical in-person outreach services to vulnerable and remote populations (newcomers, seniors, Indigenous, temporary residents, people with disabilities etc.) shared the difficulties they faced supporting their client base as they transitioned to working from home. While they continued to support vulnerable and remote populations, much of their work was done via E-ServiceCanada, which provides dedicated online/phone support (e.g. online assistance, call-backs to clients) for services and programs that are otherwise done in-person. Many CSSs noted that while E-Service was critical in response to the pandemic, many of their clients do not have internet and phone access (e.g., remote communities). Many Citizen Service Officers (CSOs) and CSSs noted that several of their clients (i.e., seniors, Indigenous, and people with disabilities) often require in-person assistance with filling out forms regardless of whether they have phone/internet access.

The absence of in-person services increased the risk of these individuals being unaware of benefits and services, further increasing their distress and vulnerabilities. CSOs and CSSs frequently expressed their frustration with the increased difficulty in reaching vulnerable groups after withdrawing in person services during a time when these clients needed them the most. In many cases, it exacerbated frustrations and mistrust of government supports and interactions for some clients (e.g., Indigenous clients). These challenges underscore that vulnerable populations often require a high touch communication and outreach approach. CSS staff stressed the importance of maintaining relationships with their clients and service delivery organizations. Many CSS leveraged their relationships with service organizations to reach specific demographics, particularly vulnerable clients to share key information and promote the take up of benefits.

“I work in a small office in a region where we have a more vulnerable, less educated clientele, with people who do not necessarily have access to the Internet. They are not able to fill out forms online.”

Citizen Service Officer

INSIGHT 2

Clients expect integrated services with real time application status updates.

HOW MIGHT WE

meet service expectations of clients by providing timely and accurate information on their benefits and services?

Clients often expect wrap-around services, as opposed to segmented service offerings that currently exist. As noted by many call center agents, clients are often unaware that benefits, programs, and services are segmented by department and/or call lines. Re-routing client calls to the correct service channel exacerbates the both the frustration and wait time for clients (e.g. when the client calls an incorrect number or the agent only has no access to account specific details and must be transferred to a specialist). For example, agents working on the general information phone lines have restricted access to client accounts and often must re-route clients to specialist call agents (e.g. EI call center), even when they may know how to resolve the issue. To provide clients with the kind of seamless service delivery they expect, many call agents working on general information lines noted that greater authorization to client accounts would allow frontline staff to better meet the needs of clients at the forefront and help to decrease call volumes.

Call center staff also felt that agents would be less overrun with inquiries if clients had access to more self-serve options and information about their specific situation at their fingertips (e.g. their claim). A common challenge for service delivery highlighted across all business lines is the inability for clients to access real time, up-to-date information about the status of their application. Call center agents, including Citizen Service officers and Citizen Service specialists who transitioned to phone support, faced unprecedented call volumes, particularly at the beginning of the pandemic from clients inquiring about the status of their CERB application. The lack of accessible real-time updates for clients was seen as a contributing factor by call agents in elevating call volumes and long call wait times. Many call agents suggested that if there was more accessible, detailed, and timely status updates, it could help to decrease call volumes and free agents to address more urgent client calls. It may also help to alleviate client anxieties, particularly in a context of uncertainty caused by the pandemic.

“Once you send in your application [for EI], it’s like our system is designed like it would be back in the day when someone still has an application and mails it in, except they do it electronically. It’s not interactive, they are sending in their application and they have no idea what happens [...] the updates you receive in your MSCA are vague”

Call Center Agent

INSIGHT 3

Application information (e.g. for EI) is complex, frequently changing and it is difficult to access clear, easy to understand, eligibility and step-by-step process information.

HOW MIGHT WE

provide simplified information and application procedures for applicants to government programs?

Clients often have a hard time understanding what benefits and services they are eligible for and how to apply for them. Frontline staff shared that clients are confused about basic program details and processes (especially for newer benefits such as CERB or new clients accessing EI for the first time). Our applications, webpages, and post-application communication are unclear, complicated, and/or insufficient for helping clients self-serve and feel informed. While this was a consistent theme mentioned for various benefits and services, it was particularly relevant for CERB-EI applicants. Call center and processing agents noted that, this is not necessarily a new phenomenon. Prior to the pandemic clients often found the EI application to be complicated and difficult to understand; however this was greatly exacerbated during the pandemic given the high influx of new clients applying to CERB and subsequently to EI. Call center agents, acknowledge spending significantly more time educating clients about EI application and reporting procedures. They also referenced an influx of queries from employers citing confusion about procedures for submitting a client's Record of Employment.

Frontline staff identified three key changes needed for the EI application: greater simplicity, more accessibility, and better communication to clients. Frontline staff cited a clear need for information packages/guides for EI applicants that use clear and simple language that allows clients to better understand the application process and terminology used by ESDC. Staff underscored the need for guides to be less text heavy and instead include a step-by-step guide with visuals, such as annotated screenshots, for how to proceed through the application. Staff often mentioned the need to provide this information in various user-friendly formats such as images, simplified graphics, or even videos that clients can easily follow. Similarly, employers need information kits to guide them through submitting Records of Employment. Keeping in mind that online access may be limited on non-existent for some client segments these information guides must be made available multiple formats including content that can be easily downloaded/printed, hard copies (e.g. pamphlets), etc., in multiple languages.

“I think, with long call time [...] we are dealing with a lot of people who have never filed for EI before... we are spending a whole hour walking someone through the program, what it means, what it do, where to find the information, and educating them”

Citizen Service Officer

FEATURED SOLUTION

IDEA 1: COMMUNITY NAVIGATORS

Clients, especially vulnerable clients, do not know about the programs and services they are eligible for and how to apply.

Underrepresented populations face additional barriers to receiving timely ESDC services, benefits and information. Community Navigators are paid trusted individuals or respected funded organizations (i.e., third parties) supported by CSS that provide information on ESDC programs, benefits and services, in hard-to-reach geographic locations and underrepresented communities facing barriers.

- Extends reach of services and provides access to benefits and services that are culturally appropriate and based on community needs, including assistance with the application process.
- Develops new jobs in rural and remote areas and Indigenous communities that could help residents develop new skills and provide economic benefits.

SURVEY FEEDBACK

Many survey respondents felt that community navigators was an idea that had been tried in the past, particularly with remote and Indigenous communities. Complexity and cost regarding third parties were cited as reasons the model was not adopted. Other respondents felt that a community navigator model for remote communities is necessary given their difficulty accessing digital services.

“There are Northern Ontario Remote Community Access Citizen Services Specialists in remote Indigenous communities currently. CSSs would require the proper training in order to be able to provide the guidance required. There would need to be a high level of trust with the 3rd parties”

Business Expertise

FEATURED SOLUTION

IDEA 2: ONLINE CLAIM STATUS

Program and digital infrastructure currently do not allow clients to see their application status in real-time.

Online status queries and additional self-serve features provide clients with updates on their claim status. This would provide information to clients on what they should expect, and by when, which would reduce elevated status inquiries and free agents to serve more urgent calls.

- Ability to check status of an application or claim online through My Service Canada Account.
- Estimated processing times provided as a guide and a notification is sent to update client on claim status.

SURVEY FEEDBACK

Many respondents were supportive of this idea with the caveat that client updates need to be clear, simple, and detailed. Respondents noted that if not clear, the update could increase confusion and calls for support and clarification. Others highlighted the importance of providing real time process estimates and updates. Concerns were raised about the feasibility, stating that it would be difficult to produce accurate estimates which again could result in higher call volumes for clarification.

“While I think it’s great, we would have to focus on making sure we don’t use too much jargon in relation to the updates on the claimant’s application and determine what we would notify them about. If the claimants see an update and don’t understand what it means they may try to contact the call centre which in turn could create more work for processing agents.”

Processing Agent

FEATURED SOLUTION

IDEA 3: EMPLOYMENT INSURANCE APPLICATION GUIDE

Clients new to Employment Insurance have trouble understanding the steps in applying for benefits.

The Employment Insurance Application Guide helps non-digital and non-tech-savvy clients, and their social support networks, to understand how the claim process works and the steps involved in completing an application. This package would be available at Service Canada centres, post offices, community organizations, via employers, as well as other relevant locations.

- Simple step-by-step application guide with screenshots, available in additional languages.
- Visual content and simplified graphics show clients the steps involved in lieu of text heavy paragraphs.

SURVEY FEEDBACK

Most respondents indicated that a guide which uses clear and simple language would be beneficial to clients as this would allow them to understand the process and the terminology used by the organization. Some respondents indicated that clients may not want to read all the information and were particularly in favour of including more visual components to the guide. A few respondents suggested that many clients may want or need a hard copy opposed to a downloadable version (e.g., people not comfortable with technology).

“The steps to be followed must be made as clear and precise as possible. An outside person must be able to navigate without having any knowledge of the site or anything else.”

Business Expertise



COMMUNICATION

Chapter

04

INSIGHT 1

ESDC websites are difficult for clients to navigate and find up-to-date information to apply for benefits and services.

HOW MIGHT WE

provide more clear and timely communication to Canadians?

During the pandemic more than ever, online communication became an important way to disseminate information to clients about our programs and services. Based on our findings, key communication challenges with clients included the navigation of ESDC/government webpages and not effectively leveraging social media platforms our clients often use to seek information about benefits and services.

Call center staff often field calls from clients seeking assistance to navigate our government websites. Staff note that they have a difficult time finding benefit information or that it requires multiple clicks to reach important benefit/service pages. Clients also experienced difficulty with text heavy pages, making it difficult to understand what benefits/services they are eligible for. Staff noted a need for more plain language and suggested that images/graphics would aid in better navigation of ESDC websites and simplify communication. A second key factor that impacts website navigation and contributes to higher call volumes is the timeliness of benefit/service updates. During the pandemic, there was often contradictory information about benefits/services that led to greater confusion and an influx of call volumes. The latest information clients would hear on social media, news outlets, and the Prime Minister's briefings would often not align with information found on ESDC webpages.

Our findings indicated that ESDC was not adequately leveraging social media sites to provide more real-time information, which could help to combat misunderstanding and misinformation. Staff felt that a coordinated social media communication strategy (e.g. on twitter, Facebook, YouTube, etc.) would allow ESDC to have a stronger web presence using platforms Canadians rely on to access timely updates and help promote and direct clients to important ESDC webpages. While strengthening our online presence is fast becoming an important aspect of communicating with clients, we still need to keep in mind that some client segments (e.g. seniors) may not be as technologically literate and online accessibility (e.g. remote communities) remains a challenge.

“Finding information on the Canada.ca site is really difficult; the search engine is really difficult and it’s really not efficient. It’s easier to type something in Google that will take us to exactly the right place on Canada.ca than it is to type in the search engine of the page.”

Citizen Service Officer

INSIGHT 2

Staff cannot keep up with the flow of information and procedural updates that they receive from multiple sources.

Our findings demonstrate a disconnect of internal, top-down, communication flow from NHQ to regions. While this is a systemic challenge that existed prior to the pandemic, it was exacerbated in the months that followed given a context of uncertainty and ever-changing reality for emergency relief efforts. The timeliness and fragmentation of communication and procedural updates were two key factors often mentioned by frontline staff that challenged their ability to provide appropriate service delivery to clients.

Staff often received communication and procedural updates from multiple internal channels (e.g. Email, SharePoint, IMPACT, CRT, etc.). This often led to uncertainty and frustration about whether they were applying the latest procedures for processing benefits. The constant procedural updates staff received raised concerns about making mistakes when assessing claims and possibly putting clients in overpayment situation. Many felt they did not have enough time to fully absorb or understand updates from multiple channels in addition to their normal workload.

Frontline staff also cited that they often felt unprepared to serve Canadians due to the lack of real time updates provided by NHQ or regional leadership. In particular, many felt caught off guard when media outlets published updates about benefits/services before frontline staff knew about them. Call agents felt unprepared for the influx of client calls and questions they receive immediately after media updates. Many call center staff expressed a need for better training and resources to ensure they are able to appropriately communicate the latest benefits updates to clients. Likewise, Business Expertise staff, who are often responsible for guiding regions felt that a lack of timely updates affected their ability to adequately support their regional staff who were seeking guidance and clarity. In an effort to adapt to ever-changing circumstances and updates regions often had to supplement their latest knowledge of benefits/services via external sources (e.g. PM announcements, media releases, etc.) to keep up with client inquires.

“I’m a bit overwhelmed by the amount of updates I get. Obviously it’s important but I feel like we are always getting those corporate messages and the same info is filtered down from our managers and the different networks we may be involved in. I know it’s just different groups covering their bases, but it fills up my inbox really fast”.

Call Center Specialist

HOW MIGHT WE

streamline internal communications to provide staff with information that is more consistent, timely, and accessible?

FEATURED SOLUTIONS

IDEA 1: ONLINE BOT/PERSONAL ASSISTANT

ESDC and Government of Canada websites are difficult for clients to navigate and find information to apply for benefits and services.

Clients find it challenging to navigate government websites to seek information or application procedures about benefits and services, contributing to high call volumes. Using features such as online bots can assist in responding to client inquiries and help direct clients to appropriate benefit information - as a first step prior to calling phone lines.

- The bot is customizable and multilingual providing personalized notifications to connect clients with services they seek.
- Uses short questionnaires and pop ups based on search functions to find relevant topics and can help with simple tasks like finding forms and guidance on how to complete them.

SURVEY FEEDBACK

Many survey respondents were supportive of the online bot idea, citing that it could be useful to decrease the difficulties and stress for clients navigating web information. Several respondents expressed concerns that clients may not have access to the internet and may not be interested or comfortable with using a bot. Others suggested that access to a live agent would be preferable as people desire human interaction and find it easier.

“I think bots take a lot of learning time to perfect and in that time make mistakes and could lead clients down the wrong path. It would be easier to have online help through chat with a specialist than a bot”

Processing Agent

FEATURED SOLUTIONS

IDEA 2: SOCIAL MEDIA STRATEGY WITH INCREASED REACH

An enhanced social media presence could help the public access information and links to benefits and services in real-time.

The vast amount of information regarding changes to benefits can be overwhelming for the public and cause confusion, resulting in higher call volumes. A coordinated social media strategy (i.e., Facebook, Twitter, YouTube, TikTok, Instagram, etc.) can help to promote and direct people to relevant real-time links. This can also help to decrease call volumes and allow agents to focus on more urgent service delivery tasks.

- Frequent Q&A sessions/threads on official government twitter and other social media accounts, answering the latest and most frequent client questions to help reduce call volumes.
- Posting up-to-date details about programs, including steps to apply, etc., linking to online visuals (i.e., videos, video sessions, etc.).

SURVEY FEEDBACK

Many respondents were supportive of this idea and thought it had outreach potential (especially for younger clients) and could reduce call volumes. A few respondents highlighted the importance of staff being consulted prior to any social media post so that they can be prepared to provide information to clients.

“I think that the current generation of young people will benefit greatly from updates from Social Media. Police Depts etc. are using this daily and it is great! I think even mandatory EI group information sessions (CIS) should be offered in the same way...”

Citizen Service Officer

FEATURED SOLUTIONS

IDEA 3: INTERNAL COMMUNICATION PORTAL

It is difficult for staff to keep up with the flow of information and procedural updates from multiple sources.

A communication portal is a central, one-stop-shop, to access the latest updates. The portal provides consistent information across all regions and functions and shares current changes in progress, so that staff can anticipate and prepare for updates.

- Internal forum provides agents to share information and answer each others question
- Has an option to receive e-mail summaries of latest updates

SURVEY FEEDBACK

Many respondents highlighted the importance of a 'one-stop-shop' type of portal to consolidate the various channels which would reduce employee frustration and make it easier to find information. A few respondents thought it was important to receive advanced notification of changes. Some shared that this is not a novel idea and indicated that regional procedures (in addition to national procedures) should be integrated into the portal, as well as condensed versions of information. It was also shared that more time needs to be allotted to agents to read and understand information and procedural changes.

“IMPACT is a great one stop shop for information - it would be better if they included links to Regional procedures in IMPACT (direct link to the Ontario SharePoint site, for example) for procedures that vary by area.”

Citizen Service Officer

WORKING ENVIRONMENT

Chapter

05



INSIGHT 1

Employees need flexible work arrangements to be at their best and manage work and home life balance during the pandemic.

HOW MIGHT WE

better support staff (especially parents) working from home to be productive while maintaining their work-life balance?

The pandemic has increased expectations of frontline staff who are managing work and home responsibilities, calls from stressed and frustrated clients, and an increased workload - all while working from home with insufficient technology and equipment. Across the board, frontline staff with caregiving responsibilities need provisions to help them manage work and caregiving in order to sustain their energy and be productive. Working from home for parents, especially of young children, has been difficult due to lack of childcare, arranging responsibilities between parents, and managing how to meaningfully attend to children, while balancing changing working conditions and responsibilities. Inconsistent, poorly functioning, or changing systems, technology and equipment disrupt staff's ability to provide services in the same continuous and timely manner as before the pandemic. Increases in distressed and confused clients trying to navigate new/changed services or using our services for the first time led to increased psychological demands (both cognitive and emotional) for staff.

Without more flexible work arrangements that can also accommodate the realities of different regions and business lines, frontline staff will continue to suffer from undue levels of stress and exhaustion that are ultimately not sustainable. This stress is often the result of tensions between being a good parent and meeting performance expectations, as well as being unable to meet performance expectations because these have not been adjusted for COVID realities. Lack of support and flexibility in accommodations sends a negative signal to employees and can lead to low morale, burnout, staff turnover, and poor employer reputation over time. These challenges underscore the need for flexible work arrangements policies that are co-developed with employees and take into account various personal situations, but also set clear expectations and give concrete guidelines.

“And the social aspect of having others around you, and we rely on each other as a team to be able to communicate effectively and so just not being able to reach out and talk to your coworker sitting across from you has impacted me a little bit. We certainly have skype, which is awesome but you don't get that face to face type of thing where you can see somebody and communicate with them at that level, so that's a bit of a difference”

Citizen Service Officer

INSIGHT 2

Collected call tracking data is not detailed enough to pinpoint and resolve (unnecessary) causes of call volumes.

Call centre agents shared ongoing frustrations about being unable to feed back issues in program processes and communications in a way that leads to action or change. Spikes in call volumes are sometimes driven by communication issues in other channels such as erroneous or outdated webpage content, unclear questions on forms, or missing information about next steps. Frontline staff flag and often offer easy and practical solutions for these issues. Although they bring these issues to the attention of their own regional management (e.g., TLs, directors), it is almost never actioned by NHQ. There is no formal mechanism to verify the frequency and impact of the issues raised because existing detailed call tracking data is simply not detailed enough.

In the absence of a better tool/system to track and feed specific program and service issues from call centre agents up to NHQ, easily fixable issues that drive up call centre volumes and cause delays on client files will continue to remain unaddressed. This will continue to occur at the expense of clients, call centre agents, and the organization in the form of operational and reputational costs. Other COVID-related changes to call centre systems for providing and collecting call centre information could be examined for the opportunity to integrate better, more detailed tracking.

"[...] it often seems that when things these were developed [EI application], it wasn't done in a group like this, where there's [...] people from across regions who deal with [clients]. It'd be nice to be consulted about what you find useful and what you like to be changed."

Call Center Specialist

HOW MIGHT WE

collect better detailed call data to identify and measure issues so that we can alleviate client frustration and decrease call volumes?

FEATURED SOLUTIONS

IDEA 1: FLEXIBLE WORK ARRANGEMENTS FOR FRONTLINE STAFF

Employees want flexible work arrangements to be their best and manage work and home life balance.

The pandemic has increased expectations on frontline staff who are managing work and home responsibilities, calls from stressed and frustrated clients and an increased caseload. The flexible work arrangements policy outlines flexible work arrangements and options that benefit both employees and the employer.

- Leadership led and co-developed with employees.
- Addresses additional pandemic stressors and mental health needs tailored to frontline staff.

SURVEY FEEDBACK

Most survey respondents agreed that employees should have the tools and accommodations necessary to work productively from home. Some respondents stated that all necessary equipment has been or is already in the process of being provided to them (and/or reimbursed), while others stated that they have not yet received any equipment and/or find that current reimbursement amounts are not enough to accommodate their work-from-home arrangement. Respondents noted that flexible work arrangements aren't often offered to frontline staff due to operational requirements and felt that flexibility and additional core hours would be helpful in achieving a better work-life-balance.

“Providing employees with better supports to do the job and care for themselves is always a great idea. Finding a feasible plan might be challenging but possible. A possible option re: flexible work arrangements may be allowing employees to take advantage of the country’s different time zones. All employees should be given second monitors; this is a high upfront cost that will pay off in the long run. Managers should receive mandatory training on how to supervise staff within a remote context during a pandemic.”

Business Expertise

FEATURED SOLUTIONS

IDEA 2: EXPAND EXISTING CALL TRACKING

Collected call tracking data is not detailed enough to pinpoint and resolve causes of call volumes.

Verbal, anecdotal information is passed on from frontline agents about what is not working or resonating with Canadians, but there is no formal process by which the information about issues from the frontlines is brought to the attention of and then actioned by NHQ, meaning that the vast majority of issues are not addressed. Collecting more detailed call data provides an opportunity to track the frequency of issues, as well as gauge the impact of addressing various issues, thereby improving services and creating an improvement loop.

- Expand the existing call tracking to capture an additional layer of detail regarding the reason for the call
- Data is reviewed for patterns and to uncover client experience problems (e.g., are there specific lines on our webpages or application forms that lead to disproportionate amounts of questions and inquiries by clients?)

SURVEY FEEDBACK

Several respondents emphasized the importance of consulting front line employees to provide primary information and insight into current issues. Many respondents also made mention of how time-consuming call tracking can be and suggested that work expectations (e.g., call time goals) be adjusted to reflect new demands or tasks. While some respondents indicated that this was not necessarily a new idea, they did note the importance of call tracking.

“So often the people who actually use the tool are not consulted or even considered. It is something that can be changed and should be. consultation needs to happen first. this would not only help in creating better products it would also help create a more engaged staff”

Business Expertise

INSIGHT 1

Frontline staff feel that not enough time/resources have been invested in training during the pandemic, to the detriment of service quality and staff morale.

HOW MIGHT WE

prioritize time for staff training (despite the pressure to perform without it) in order to save time, improve service, and retain staff?

With changing roles and responsibilities for experienced staff, the addition of many new staff, changing programs and procedures, and transition to the virtual workspace, frontline staff communicated that a healthy balance between appropriate training and having as many people as possible answering calls was not achieved. The expectation that all staff could effectively learn about new programs and procedures solely by following along long strings of update emails, as opposed to an organized and prepared package of information, was often unrealistic. Although preparing and implementing training costs time and resources, staff reported that they frequently ended up spending as much or more time trying to understand things alone, didn't end up having answers for clients, and sometimes provided information that was later revealed to be erroneous. Lack of training and simply being told to read emails also made staff feel unappreciated, "in the dark", and inefficient. In addition, without the ability for hands-on training and time for informal supports in the office environment, the virtual space created an even greater need for structure with training.

Without increased training, some staff will continue to give poor client service because they don't fully understand certain materials or procedures. Because not all staff will (be able to) take the time to read everything provided (reading walls of text is not easy) they end up improvising and may provide wrong information based on assumptions. This is especially likely without more informal opportunities for conversations with colleagues. Finding the right balance between investment in training and number of agents and time live on the phones requires experimenting with and measuring effects of increased training on performance. For example, small regional initiatives could test whether providing some staff with a few extra hours to develop training materials for particularly challenging processes, potentially paired with quizzes for staff to identify who needs additional help, increases the quality of service during calls, number of call backs, and/or client satisfaction.

"We were working on trying to get those pensions teams to look at virtual training since traditional class room training is difficult because of space... we were talking about how do we do this over next 2-3 years... and it went from 2-3 years to 2-3 weeks [due to COVID]... so that was a big change."

Business Expertise

FEEDBACK FROM DESIGN SPRINTS

Our findings and ideation workshops held with frontline staff indicated that given the vast diversity in training needs for various business lines, it was difficult to propose solutions that would adequately address more immediate scope and needs. Some of the ideas suggested were high-level, longer-term and more transformative in nature that require infrastructure or support that was out of the scope for the project. The findings and workshops to offer some feedback for consideration when for revising training processes, particularly for the virtual environment:

- build on existing programs for mentorship and real-time training that can better respond to ongoing changes.
- Formalize mentorship and peer-support as an integrated part of the week and compensate/recognize people for their knowledge sharing in a way that is predictable and manageable.
- With the shift to an online work environment, there is a need to better understand staff's digital environment in regard to their needs, support and coaching.

WELL-BEING



Chapter
07

INSIGHT 1

Staff feel abandoned by upper management and blindsided when they don't receive crucial information about new/changed programs in a timely manner. As a result, they often take verbal abuse and feel guilty and frustrated when they cannot answer client questions.

Frontline staff (especially call centre agents) experienced difficulties serving clients when new programs or program changes occurred because they were not provided with any or sufficient details about the changes before clients called in with questions. Although the relevant program and service change details were available at NHQ, they were not communicated with frontline staff in time. For example, information about scheduled gaps in ESDC CERB payments (claw back of advance payment) were not communicated with EI call centre agents until after clients began to call in about missing payments. In addition, more formal or practical hands-on training for more complex changes (e.g., new application processes) is often entirely absent, and frontline agents must sift through copious documents about program and procedural changes and interpret their implications on their own.

In the absence of faster, more timely sharing of information about key changes, call center agents will continue to feel frustrated, ill-equipped to answer new client questions and suffer verbal abuse from unhappy clients who are reading initial (often misleading) information about these changes from online sources. Without investment in more formal and applied training for major changes, staff will not be able to fully understand and confidently provide advice and answers to clients about these changes. There is an opportunity to leverage the expertise of individuals who are key connectors between NHQ and the regions identified by this project to identify and remove barriers to faster information flow from NHQ to the frontlines.

“I understand that happens but I felt guilty because I still couldn't help them [clients]. As much as I was trying to answer their questions, I don't know. I felt lost at some point. I felt angry because I felt useless”

Citizen Service Specialist

HOW MIGHT WE

provide better training and communication about new/changing programs and services to reduce the stress staff feel when they are helpless to serve clients?

INSIGHT 2

Staff do not have enough allotted off-call time to allow for recovery after high distress calls or to do necessary after-call work for new or complex situations.

HOW MIGHT WE

build realistic recovery and break time into staff days so that they can take care of basic after-call needs such as mental health and after call work?

COVID has increased call volumes, overtime work, interruptions due to technology, the number of distressed callers, confused first-time clients, and the number of new programs, services, and procedures. Yet, existing options for taking an official break have either not been adjusted or insufficiently adjusted for these circumstances. Options for taking an official break are limited to a few scenarios that don't encompass the range of reasons for needing break, and staff fear repercussions for using the time. Current options include a "5 minutes not on the phone" or "after call work." The former is just enough time for physical needs like washroom breaks etc., and the latter is discouraged because it is expected that staff complete paperwork while on the phone. These limitations put staff in the position of having to separately request and legitimize even small breaks that are absolutely necessary to their wellbeing. This makes taking a few extra small breaks a stressful decision and undertaking. There is a perception by staff that while direct management is understanding, senior management is less so and there are concerns that performance will impact career opportunities and lifetime trajectory. Finally, codes to classify time when systems/technology are not working have not been formalized, resulting in workarounds such as staff taking vacation time when the network is down for longer times.

In the absence of creating time for breaks after high stress/abusive calls, call centre staff will continue to push themselves into taking more calls before they have recovered, risking both negative mental health outcomes (e.g., burnout), as well as reduced performance in subsequent calls. Without appropriate ability to assign after/pre-call time to do some research and problem-solving when it comes to new/changed procedures, staff will continue to experience reduced efficacy to be able to provide quality to service to clients. These challenges underscore the need to develop formal procedures for break and after-call times that actively incorporate frontline needs and realities. The connections made throughout this project with frontline expertise (e.g., regional BE, managers) who know how these needs could be measured and integrated into the existing procedures, provide the opportunity to quickly form local task teams that can build and test new options.

"There was a lot more people that I found became more verbally abusive and we had a procedure that was launched for difficult calls and how you handle them, and that was really hard because every time you told somebody you don't know how to do something they would be like 'oh my god then what are you getting paid for?"

INSIGHT 3

Call centre specialists' current performance metrics don't align with the changing reality of the work.

Since the start of the pandemic, call centre work has changed dramatically, with both longer and more difficult calls, as well as increased cognitive demands due to rapidly changing and new programs and procedures. Calls are taking longer than usual because there are more new clients who are using our services for the first time and there is more confusion around how changed/new programs work. This makes it difficult for call centre agents to adhere to established average handle times and impacts their ability to complete their normal workload. Workload expectations and performance metrics such as average handle times have not been adjusted for frontline staff to reflect the current, constantly changing reality for service delivery.

Although frontline staff have brought this to the attention of their regional management repeatedly, there has been no response from national headquarters representatives who set these performance metrics. This may be because currently quantitative performance indicators are not set in a way that brings in measurements from the frontline regarding the kinds of call lengths required for quality service provision for different clients, or how much off-call time is needed for frontline staff to be able to absorb and process information, updates, and training. Without adjustment of these metrics in a way that balances quality and speed of service using rigorous adjustable indicators, frontline staff will continue having to sacrifice quality to be able to meet performance standards. Front line staff felt that greater input is needed from regional staff to build a set of Key Performance Indicators that balances organizational needs, quality of service provisions, and is flexible to changing circumstances.

HOW MIGHT WE

adjust performance measurement to be more reflective of current challenges and document the qualitative value and impact of excellent service?

“There is no communication as to how to how all these changes, average handle time, start time, how that may be adjusted, and understood that our Pre-COVID times might not measure up. Nothing from management or TLs to address it, so the expectation was still there to meet those stats”

Call Center Specialist

FEATURED SOLUTIONS

IDEA 1: ADJUSTING HOW PERFORMANCE IS EVALUATED

Call centre specialists' workload expectations and performance metrics have not aligned with the changing reality of the work.

Calls are taking longer than usual, particularly since there is a higher volume of clients, many who are using our services for the first time. Workload expectations and performance metrics such as average handle times need to be updated to reflect the current, constantly changing reality for service delivery.

- Handle times are updated regularly, reflect current circumstances, and are sensitive to the complexity of the call and client segment.
- Agents receive time to absorb and process information and updates as part of their daily workload expectations.

SURVEY FEEDBACK

Many survey respondents mentioned that maintaining average handle times can be a source of stress for call centre agents, especially in the current changing context. Respondents agreed that changes in expected handle times are needed to reflect current circumstances, some stating that they should be removed entirely during the pandemic. Respondents suggest that performance evaluations should be focused on the quality-of-service delivery, and not the quantity, to both better serve Canadians and reduce future workload by decreasing the volume of follow-up inquiries resulting from poor quality calls.

“Handle times, monitoring handle times and evaluations based on handle times contribute excessively to the stress experienced by the call center agent...The call center agents should have the liberty to ensure that the clients concerns and problems have been resolved, it would eliminate callbacks for unresolved issues. Sometimes calls are rushed because the agent know they are timed and they are stressed by the fact that they have to complete the call in a predetermined timeframe...”

Citizen Service Specialist Officer



TECHNOLOGY

Chapter

08

INSIGHT 1

A lack of adequate equipment and resources has contributed to the challenge of adjusting to a work from home environment.

Measures to reduce the spread of COVID-19 required many levels of government to transition towards a work from home environment for remote work. With majority of staff not enabled to work remotely from home, ESDC had to quickly scale up access to office resources, equipment, and supports required by staff to perform their functions. Some key technology challenges included:

Adjusting to working from home: The call to work from home made staff feel reassured knowing that they are able to properly practice physical distancing measures. Nonetheless, many felt that they were caught ill-prepared and off-guard for a work from home environment since they did not own a personal computer/laptop to use APPGATE or a government work laptop to do work, often having to find immediate workarounds.

Online access: Agents in more rural/remote areas with spotty cellular service or extremely limited internet bandwidth struggle working from home. Knowing there is a lot of work to get done but being unable to consistently connect to APPGATE or VPN made them feel anxious even though there was not much they can do to improve their situation. Since speaking with these agents, ESDC has provided work laptops and VPN access to staff working from home. Staff still often cited the need for a more consistent and stable connection to VPN/APPGATE to eliminate disconnections and interruptions to work.

Lack of access to critical office equipment: Many processing agents work on larger screens/monitors to display multiple programs screens and/or documents in order to efficiently process client benefits. Similarly call agents, often use multiple screens and hand-free calling with headsets to address client inquires/files. Early on during the pandemic agents had no access to necessary equipment thereby affecting work productivity. Many do not have the necessary furniture to work comfortably from home, adding to the list of challenges that affected their physical and/or mental wellbeing. Since speaking with staff, ESDC has provided some measures for access to equipment for home workspaces.

HOW MIGHT WE

better support a transition to work from home with appropriate resources and equipment?

“For myself, one of the biggest issues is connectivity...I am using my own internet here at home... I have the fastest internet in the City of Winnipeg and I still have connectivity issues.”

Call Center Agent

FEEDBACK FROM DESIGN SPRINTS

Our findings and ideation workshops held with frontline staff outlined several technologies need to better equip staff to work from home. Many of the proposed solutions suggested during the workshops were either already being implemented by ESDC (e.g. to address equipment needs) or they were longer-term and more transformative in nature (e.g. increasing bandwidth) that was outside the scope of this project. The findings and workshops to offer some feedback for consideration when to better support the technology and equipment needs for staff:

Claims Portal for Equipment and Resources

- Every Government of Canada employee working remotely from home can claim an amount towards the purchase of necessary office equipment to enable them to work efficiently, productively, and comfortably
- A claims portal should be created detailing exactly what is claimable, how much of a stipend they have (or have left), submit a claim to be refunded (fill out an e-form on what they bought, where they bought it, how much it cost, and attach proof of purchase receipt, etc.)

Borrowing Office Equipment and Furniture

- Many Government of Canada employees are properly equipped to do their work from their office
- If they are expected to do work remotely from home for the foreseeable future, they should have access to the very same equipment. If the equipment that is assigned to them or their cubicle is being unutilized, they should be allowed to borrow them and bring it home to use. If there is anything that is missing that they need, a NSD ticket can be submitted, the Government of Canada will assign and provide the needed equipment quickly

PROJECT TOUCHPOINTS ACROSS ESDC

Chapter

09

PROJECT TOUCHPOINTS ACROSS ESDC

Over the course of the project, we connected with other teams across ESDC that were working on projects related to relief and recovery efforts for service delivery. These touch points provided an opportunity for us to learn about interventions other teams were undertaking, provide advice about field research, and share our findings. In several cases, we shared our raw data sets, insights, and the proposed solutions that directly supported the work of colleagues across ESDC. Some key touch points for sharing findings and knowledge translation included:

Human Resources Business Innovation (HRBI)

- HRBI initiated a White Paper Collaboration to help the federal government prepare for the next two years post-pandemic. Project findings contributed to the collaboration by bringing forward regional and frontline perspectives about communication with Canadians, tailored program interventions, and future service delivery.

Employment Insurance Policy Simplification Task Force (EIPSTF)

- The working group (co-led Mathieu Audet, Lab Manager), designed and implemented client and stakeholder-facing communications about CERB and the CERB-EI transition. Our project informed the development communication material and flagged potential challenges and opportunities relevant for different sub-working groups about policy, operations and workload management.

Security Awareness, Training, Education and Outreach (SATEO) Program

- As part of the Corporate Security Office, SATEO is developing a program to equip client-facing employees with training and resources to handle security incident occurrences. Our project provided perspectives and insights about training, well-being and security issues experienced by frontline staff during the pandemic to inform SATEO's work.

A photograph of two women sitting at a table, smiling and talking. The image is overlaid with a semi-transparent red filter. The woman on the left is wearing glasses and has her hands clasped on the table. The woman on the right is looking towards her. The background is dark and out of focus.

CONCLUDING REMARKS

Chapter

10

CONCLUDING REMARKS

The project proposed nine solutions in response to project findings and feedback from frontline staff for four of the six themes outlined in the report. They are provided in summary below:

THEMES	PROPOSED SOLUTIONS
Client Needs	<ul style="list-style-type: none"> · Employment Insurance application guide · Online claim status · Community navigators
Internal and External Communication	<ul style="list-style-type: none"> · Social media with increased reach · Online bot/personal assistant · Internal communications portal
Working Environment	<ul style="list-style-type: none"> · Social media with increased reach · Online bot/personal assistant
Well-Being	<ul style="list-style-type: none"> · Social media with increased reach

As this phase of the project work ends, the Lab team will disseminate findings and explore the potential for a second phase of the project.

CONCLUDING REMARKS

OPPORTUNITIES TO DISSEMINATE FINDINGS

We will seek opportunities to share and present findings and prototypes across the Regions and NHQ through activities such as:

- Continuous engagement with regional staff (e.g. in regional newsletters, meetings, etc.)
- Presentations to NHQ strategic service delivery areas (e.g. Citizen Services Branch and Benefits Delivery Services Branch)
- Sharing through various ESDC online platforms (e.g. Lab newsletter, Intersection articles, research tables across ESDC etc.)

SCOPING FOR A POTENTIAL PHASE II

The Lab is scoping out the second phase of this project that will focus on identifying which of the nine proposed solutions are feasible for further development into working prototypes. The lab team will explore the potential of developing Prototyping Task Teams with both regional and NHQ staff to champion to co-develop select prototypes. Through our extensive engagement with frontline staff we have established a roster of individuals who have indicated their willingness to participate in the potential development, testing, and scale-up of promising prototypes. The Lab would also seek to find opportunities for collaboration on related initiatives currently underway in the department.

OUR LAB TEAM AND RCN MEMBERS

Chapter

11

OUR LAB TEAM



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