

Appendix: Transformation of the Service Delivery System

The old system was highly clerical and administrative, and mainly financial in nature: calculate income-assistance benefits as best possible, verify the amount on the cheque and make sure it was mailed on time. Cheque production involved obtaining a number of signed approvals and repeated forms to fill out. Clients might have to state their names 12 times in a row for various departmental procedures.

The computer system was antiquated — 16 years old compared to a normal seven-year operational cycle. Policies and procedures were confined to printed manuals with none of the material online. The applications used hundreds of codes that were hard to remember, and employees had to switch back and forth constantly to calculate the amount of income assistance. The application of official policies varied by both region and case.

The system was slow and rather inefficient. Applicants for social assistance were assigned a manager, who changed as the case was evaluated and the situation developed. Cases were divided into three categories: long-term (one meeting a year), medium-term (one meeting every three months), and short-term (one meeting a month). In addition, those taking job training depended on one manager for the training and another for the financial assistance, and there was scarcely any contact between the two.

The new computerized system of service delivery radically changed every step that applicants and clients had to go through, and was based on the use of two new work tools: case management and NB Case.

Case management divides files into two categories. Long-term cases are clients with little likelihood of leaving the income-assistance system due to their age, health, or a mental or physical handicap. Their managers work with community groups to help these clients. Active cases are those in which the manager helps the client re-enter the job market. The purpose of the career plan developed with the client is financial self-reliance and psychological independence. Clients always deal with the same case manager.

The case eligibility and classification process is handled by phone. The eligibility evaluation takes about 15 minutes by phone if the client can provide the official with the necessary information through preregistration. The information is entered into the NB Case computer system and, if the client is eligible, a meeting within eight days of the initial call is arranged, involving either a trip to the office to sign forms or, in 50% of cases, a visit by the needs evaluation specialist to verify some of the information and documents, and get the forms signed. The evaluator then gives the client the date of their first meeting (within the next 30 days) along with the name of their case manager, and has a preliminary discussion of the client's goals and objectives.

Following this meeting, a series of individual interviews are held to do a thorough assessment of the client's needs and determine what level of services the Department will provide. A client profile is prepared specifying strengths and areas where improvement is called for. Clients are in charge of their own career plans and the system includes a timetable for implementation of the plan. The case manager's job is to oversee clients by providing all the pertinent information and supporting them in their efforts to become self-reliant. Managers do not do what the clients themselves are expected to do; they guide and encourage clients towards becoming self-reliant.

Despite its complexity and sophistication, NB Case is a user-friendly system. Information only has to be provided by a client once, and is immediately entered into a database. Income assistance is calculated on the basis of standard criteria specific to the information received. The system ensures uniform policy application because all policies are incorporated into it. The database can be used to create new programs adapted to clients' needs. The difference in work volume is substantial: 70% of a manager's time is spent on clients, with administrative procedures requiring less time and attention.

With the new system, clients were surprised to be asked numerous questions, but access to the system is broader. Even though the policies keep on changing, the way in which eligibility is determined is faster and more precise because the system uses more information and this data is more accurate. Moreover, clients themselves can access the system: they can view and check policies, and realize everyone gets treated the same way. Beneficiaries can also access their own files.