



Assembly of First Nations

5th Annual National Forum on Income Assistance:

From Surviving to Thriving

WHAT WE HEARD REPORT

September 10-12, 2024

Calgary, Alberta



Assembly of First Nations
5th Annual National Forum on Income Assistance:
From Surviving to Thriving



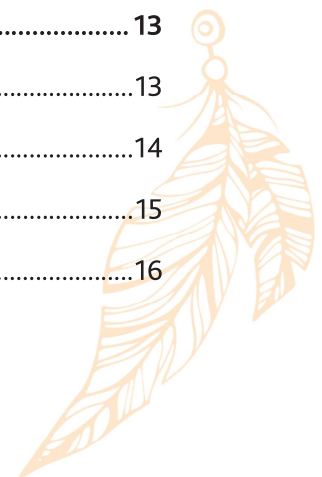
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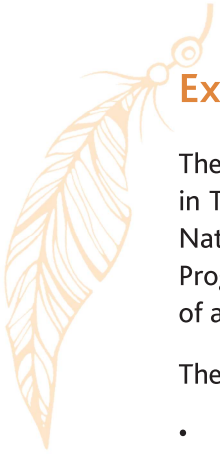
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Executive Summary

The Assembly of First Nations (AFN) 5th Annual National Forum on Income Assistance (IA) was hosted in Treaty 7 Territory of Calgary, Alberta, from September 10-12, 2024. The forum gathered 150 First Nations IA case managers and administrators from across Turtle Island to hear about the status of IA Program reform, network, and provide input on best practices and priorities for core program elements of a reformed IA Program.

The Forum included panels and speakers on key topics related to IA reform, including:

- building sustainable IA Programs;
- best practices for case management and pre-employment supports;
- the interconnections between IA and housing and homelessness; and
- best practices for wrap-around supports for IA clients, case managers, and administrators.

Additionally, the forum included a workshop from the Thunderbird Partnership Foundation on First Nations Mental Wellness, as well as five breakout sessions to hear from IA case managers and administrators on key priorities and regional considerations for costing and implementation of key components within the IA Program.

The What We Heard Report outlines considerations and priorities for implementing the First Nations recommendations for IA Program reform, informed by the unique experiences of First Nations case managers and administrators across Canada. The AFN has developed this What We Heard report as a separate document from the IA Forum Summary Report to emphasize the voices of First Nations IA case managers and administrators.





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Background and Introduction

In 2018, Indigenous Services Canada (ISC) committed to reforming the IA Program to make the program more responsive to First Nations. Following their commitment, First Nations-in-Assembly passed AFN Resolution 28/2018, *Support for the establishment of a Technical Working Group on Social Development*, mandating the development of a Technical Working Group on Social Development (TWGSD) to provide regional considerations and priorities for the reform of the IA Program. Since 2022, the AFN and the TWGSD have been working with ISC to ensure First Nations voices are leading the reform of the IA Program. The TWGSD leveraged the five themes from the ISC-funded First Nations engagements hosted between 2018 and 2020 to develop a storyline policy document outlining six key recommendations to reform the IA Program.

The policy recommendations include: First Nations governance over the IA Program to meet IA client and family needs; increasing IA rates to account for the true cost of living on-reserve; strengthening wrap-around supports for IA clients and their families, with a particular focus on those with special and additional needs; increased resources and funding to support administration and case managers; First Nations-designed data strategies and collection; and infrastructure investments to enable First Nations to develop and administer their own IA Program.

The recommendations were supported by First Nations-in-Assembly through AFN Resolution 07/2022, *Reform of the On-Reserve Income Assistance Program*, which further mandates the TWGSD to oversee an assessment of the long-term financial investments required to fill the gaps in the IA Program. Subsequently, the recommendations were submitted to ISC to support their Memorandum to Cabinet for the reform of the IA Program in January 2023.

To continue First Nations-led reform of the IA Program, the AFN Social Development sector coordinates a National IA Forum. The 5th Annual Forum took place on Treaty 7 Territory of Calgary, Alberta, from September 10-12, 2024. The forum gathered 150 First Nations case managers and administrators to hear IA reform updates and learn about best practices from 15 speakers. To enhance the AFN advocacy efforts, participants were invited to attend break out sessions where they were engaged on specific questions. This dialogue has emerged as 7 key themes highlighted below. Further, each session is documented to capture participants' perspectives in detail.





Key Themes from Engagement

- 1) **Regional Variations:** The On-Reserve IA Program's authorities mirror the provincial/territorial (P/T) programs, creating regional variations in program administration across First Nations. Regional IA programs are unable to account for the difference in economic development within First Nations, resulting in additional expenses not currently provided within the IA Program. Participants identified nine categories of hidden costs experienced by IA clients, including fees and bill payments, transportation, food security, housing, appliances and devices, start-up allowances, membership, services, and programs and health costs.
- 2) **Human-First, Trauma-Informed Case Management:** Participants outlined the overarching goal for case management and pre-employment supports as leveraging a human-first, trauma-informed approach to meet clients where they are and respond through the provision of supportive programming and skill-building opportunities necessary for clients to build stability, self-esteem, and increase their independence.
- 3) **Tiered and Needs-Based Support Strategies:** A human-first approach within the IA Program requires leveraging different approaches to varying levels of need. Participants identified five different strategies for implementing case management and pre-employment supports, including a prevention and diversion strategy, a youth-specific strategy, a transitional support strategy, a safety strategy, and a client incentive strategy.
- 4) **Defining Success Through Wellness and Outcomes:** In aligning the priorities for success from a human-first approach, participants broadly defined a successful IA Program as one that nurtures self-reliance, supports personal goal setting, and enhances the well-being of clients. Wellness measurements identified to track a successful program were categorized into four separate dimensions: client progress and engagement, accessibility and integration of services, employment and education outcomes, and long-term wellness outcomes.
- 5) **Wholistic Program Design:** Reforming the definition of a successful IA Program requires the use of a wholistic understanding to account for the First Nations identified priorities for case management and pre-employment supports, in addition to measuring how each of the different program components work on its own and how they work together. A successful program responds to the diverse needs of First Nations IA clients and strengthens their access to basic needs such as food security, housing, and transitional financial supports to shift from surviving to thriving.
- 6) **Training Priorities:** To support the delivery of effective, culturally responsive services within an enhanced IA Program, participants identified a wide range of training priorities grouped into the following key areas: Person-first service delivery and self-care, case management and client navigation, policy administration and technical skills, professional and leadership development, navigating conflict and workplace safety, and health and specialized medical awareness training.
- 7) **Peer Support Networks:** Participants identified structuring an IA worker peer support network through three different channels, including regional, national, and nation-to-nation, to separate support based on need and ensure collaboration across all levels.



Session One: Identifying Hidden Costs for IA Clients

The On-Reserve IA Program's authorities mirror the provincial/territorial (P/T) programs, creating regional variations in program administration across First Nations. The different policies create socio-economic barriers unique to the region in which a First Nation resides. Additionally, regional off reserve IA programs are unable to account for differences in economic development within First Nations, resulting in additional expenses not currently eligible to be provided within the on-reserve IA Program.

Session One focused on gathering feedback from participants on the additional expenses of IA clients. The questions sought insights, lessons learned, and the innovative solutions IA workers use while supporting their clients' navigation of the various hidden costs. Since the administration of the IA Program is linked to the P/T's, some of the cost-influencing factors included may be available within some regions and not others. Additionally, the type of funding agreement through which a First Nation operates its social programming impacts the level of support a First Nation can provide to IA recipients with additional expenses.

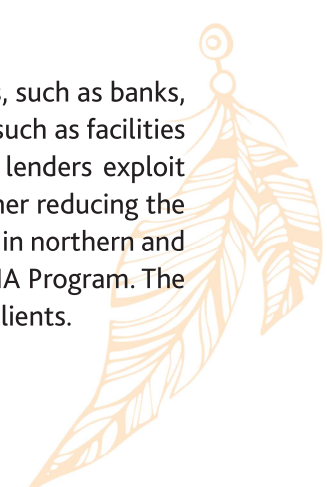
Overarching considerations for the hidden costs experienced by IA clients define the socio-economic realities of the social safety net. The lack of housing has led to overcrowded housing conditions, creating unstable and unsafe living conditions, impacting individual capacity to maintain good mental health and transition to education or employment.

The distribution of payments to IA clients recognizes one individual residing within the household as the client, with all additional individuals included as dependents. The structure fails to account for the lack of appropriate housing and the prevalence of multigenerational households and prevents dependents from accessing key services and supports needed to develop the skills required to transition to education or employment. This further contributes to intergenerational poverty and the need for income supports. Additionally, families with children or adult dependents are disproportionately impacted due to a lack of caregiver supports.

The hidden costs experienced by IA clients have been grouped into eight categories, including fees and bill payments, transportation, food security, housing, appliances and devices, startup allowances, membership, and health.

Fees and Bill Payments

First Nations often lack infrastructure to access basic amenities available in urban areas, such as banks, grocery stores, medical care, and service facilities, limiting access to various amenities, such as facilities offering free Wi-Fi to access online education or job training. Additionally, predatory lenders exploit access barriers by increasing the fees for various services, such as cashing cheques, further reducing the amount of available income for IA clients. Moreover, utility costs are significantly higher in northern and remote areas, which are not properly accounted for when determining rates within the IA Program. The following list includes some of the additional expenses experienced by First Nations IA clients.





- Bank fees
- Cheque cashing fees
- ID application
- ID renewals
- Birth Certificates
- Hospital parking fees
- Late fees
- Utility deposits
- Utility costs
- Connection fees
- Reconnection fees
- Seasonal utilities
- Internet bill
- Cell phone bill
- Renters insurance
- Car insurance
- Car payments
- Educational assessments
- Disability assessments
- Mental health assessments

Transportation

Transportation is a key cost driver for First Nations. Many communities lack public transportation, impacting their ability to access basic amenities such as grocery stores, banks, appointments, employment, group sessions, social programs, service centers, and ceremonies, if they are available within the community. Cab fares are often expected to come out of basic needs, reducing the amount of available income to pay for basic amenities or purchase essential items.

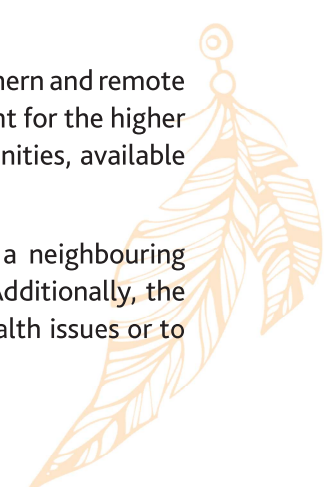
Participants highlighted gaps within the P/T comparability, noting some regions provide coverage for some of the additional expenses, but at significantly lower amounts than those provided to individuals not residing on reserve. Additionally, some regions have vehicle ownership caps restricting vehicle ownership to one household member, creating barriers to employment or training for individuals residing in multi-person households.

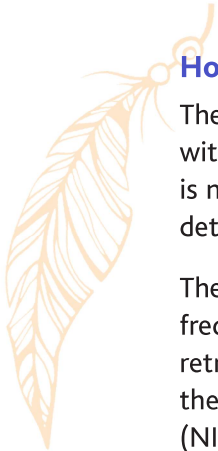
Vehicle ownership caps also create barriers in households where caregiving for members with additional needs requires frequent visits to medical facilities or appointments. Limited access to transportation and the increased cost of transportation disproportionately impact individuals who are wheelchair bound. First Nations continuously advocate for the development of sustainable community-led transportation initiatives; however, social programs do not provide the flexibility in resources to embolden these initiatives.

Food Security

Food security is a common issue across First Nations, particularly for First Nations in northern and remote areas, where the cost of food is high. The rates provided by the IA Program fail to account for the higher cost of living in First Nations. Access to nutritious food is limited and, in some communities, available food is spoiled or of low quality, making it unsuitable to support healthy living.

Some community grocery stores do not sell produce, forcing members to travel to a neighbouring community to access healthier food options, in turn increasing transportation costs. Additionally, the IA Program offers limited financial support to accommodate restrictive diets due to health issues or to support parents needing to buy snacks for children in school.





Housing

The lack of available housing across Canada disproportionately impacts First Nations residing on reserve, with additional stress on northern and remote communities. In some regions, the shelter portion of IA is not permitted to be used for band-owned housing, negatively impacting First Nations who are self-determining responses to the national housing crisis.

The lack of housing for First Nations in some regions has led to overcrowding, impacting the need and frequency for housing repairs, which are also not covered by the IA Program. Furthermore, funding for retrofits for clients with additional needs is capped or not provided. In some instances, the band can cover the expenses for the required supports; otherwise, clients are diverted to Non-Insured Health Benefits (NIHB).

If a client becomes unhoused, there is often no funding to support them with temporary housing initiatives, such as providing them with a hotel room, when access to shelters is either limited or does not exist. Lastly, the IA Program is unable to support recipients with additional funds for moving costs, rent deposits, or damage deposits. Clients are not provided with the appropriate levels of income to support saving or cash management, which highlights significant gaps within the current administration of the program.

Appliances and Devices

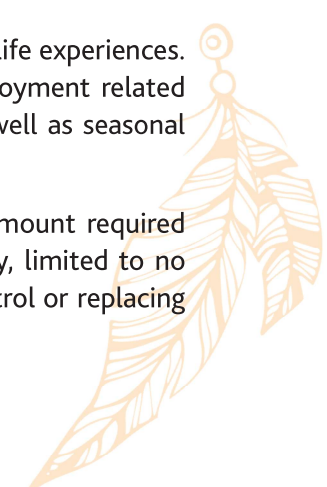
Missing infrastructure within First Nations significantly impacts the availability of goods at the community level, resulting in higher shipping costs, particularly for northern and remote areas. Funding amounts for purchasing items such as air conditioners and various household appliances are often capped, resulting in the purchase of second-hand or refurbished items, which might not offer warranties, impacting the lifetime of the item.

In instances where items are purchased new, the program often does not provide coverage for warranties, shipping, or support for future repairs. Additionally, the goal for the IA Program is to support clients in shifting to education or employment; however, computers and cell phones are not included as eligible expenses, although required to seek employment or education opportunities.

Startup Allowances

Expenses to support clients with startup allowances will vary depending on the client's life experiences. The IA Program does not provide support in accessing items such as furniture, employment related expenses such as work clothing and/or tools, school supplies, graduation outfits, as well as seasonal clothing and shoes, particularly for parents with growing children.

The program does not provide consideration for the higher cost of goods and the amount required to purchase daily items for hygiene, cleaning supplies, and laundry costs. Additionally, limited to no resources are available to provide emergency funds for arising issues such as pest control or replacing damaged furniture following emergency disasters such as infestations, flooding, or fires.





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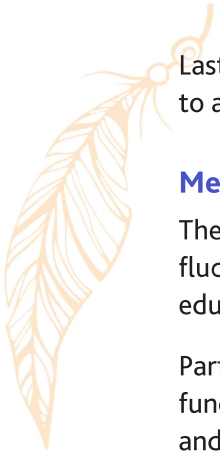
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Lastly, the program is unable to support clients with housing and utility arrears, impacting their abilities to attain these services or access safe and suitable housing.

Membership

The IA Program currently does not provide support for community population fluctuations. Population fluctuations can be seasonal, caused by individuals returning home from seasonal employment and education, or by services and supports responding to the needs at the community level.

Participants highlighted the importance of providing funding to support non-status children, increasing funding for the provision of off-reserve requests for clients who are unable to access provincial services, and increasing access to services and supports for dependents within a household. Community population fluctuations and enhanced supports for First Nations not currently residing on reserve need to be considered when developing budgets and eligible expenditures within the reformed program to ensure all members have equitable access to supportive services.

Services and Programs

Coverage limitations for programs and services necessary for day-to-day needs within First Nations vary depending on the region a First Nation is located. In some regions, there is no coverage for clients needing access to childcare, therapy, and/or various mental health services.

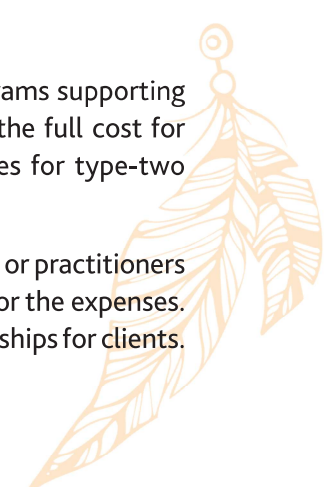
Additionally, the program does not provide resources for clients to access recreational sports programs and gym memberships, which are crucial for increasing wellness outcomes. Seasonal expenses such as lawn mowing and snow removal services are often not provided, creating challenges for clients with limited mobility or special needs.

Special needs program funding expenses are often capped, resulting in the inability to attain all items required for clients with additional needs to maintain a dignified life. Additionally, the program does not provide funding to ensure Elders can be provided honorariums when they support program and service delivery, highlighting a significant gap in cultural inclusion. Lastly, the program does not support clients with the costs associated with owning and caring for a service animal or a household pet, which can be beneficial for families.

Health

First Nations often experience significant barriers when accessing the appropriate programs supporting the cost of health expenses, such as the NIHB program. The program does not cover the full cost for specific health expenses, such as specialized dental work, various medications, supplies for type-two diabetic needs, elder home retrofits, and ramp installations.

Clients accessing supports through the program often experience lengthy waiting periods, or practitioners and service providers do not bill directly, resulting in clients having to pay out of pocket for the expenses. The gaps in available expenditures covered within the IA Program create unnecessary hardships for clients.





The reformed program needs to respond to the gaps in coverage by providing flexibility in funding and eligible expenditures to offset the hardships caused by provincial policies and the lack of coordination between different social programs.

Session Two: Identifying Culturally Appropriate Wrap-Around Supports

First Nations case managers and administrators are leaders in innovative implementation practices, often needing to be resourceful to offer the key programs and services needed within their communities. The firsthand knowledge and experience from working within their communities is important for identifying the services, strategies, and supports required for creating a successful program.

The second session focused on defining goals and sharing best practices for case management and pre-employment services. The identified goals included identifying key services, targeted approaches, and the terms required for the administration of culturally appropriate case management and pre-employment supports.

Goals for Case Management

Participants outlined the overarching goal for case management and pre-employment supports as leveraging a human-first, client-centered, trauma-informed approach to meet clients where they are at and respond through the provision of supportive programming and skill-building opportunities necessary for clients to build stability, self-esteem, and increase their independence.

Clients are starting from various places of wellness, which requires the provision of different levels of supportive programming and skill-building to increase overall well-being and performance outcomes. The program needs to meaningfully respond to clients' needs, regardless of their starting point. Case management must provide clients with wholistic supports aimed at addressing wellness goals and building essential life skills.

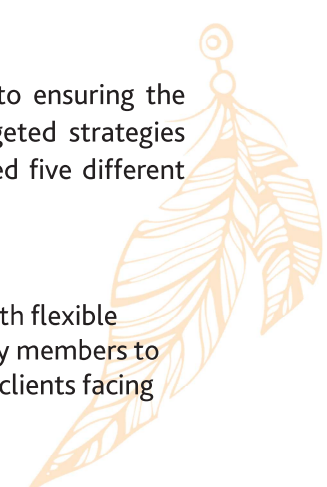
Targeted initiatives were deemed as valuable to strengthening the program's effectiveness and capacity to support all clients across different levels of need.

Strategies

Leveraging different approaches to client interactions within the IA Program is key to ensuring the reformed program shifts from a universal approach to providing adaptable and targeted strategies for common client to program interactions and service delivery. Participants identified five different strategies to enhance the efficacy of the program for clients, including:

1) A Prevention and Diversion Strategy

- The strategy would provide First Nations with additional financial resources with flexible terms to administer services and financial supports to help stabilize community members to reduce the need for long term IA supports. The strategy would support non-IA clients facing





hardships on an interim basis for up to a year. The strategy should focus on short-term financial support and case management services aimed at collaborative goal planning, building client stability and independence, and avoiding full enrolment into the IA Program.

2) A Youth Specific Strategy

- This strategy would provide targeted supports to youth with various needs to build job skills, provide on-the-job training, and achieve additional training or education to prepare for greater independence. The strategy should focus on providing life skills such as managing personal and professional relationships, addressing peer pressure, building community, and belonging in new spaces, alongside job training and education.

3) A Transitional Support Strategy

- The strategy would assist clients transitioning between different levels of need within the supports and services offered by the IA Program. Transitional supports would ensure clients transitioning to employment, education, or to a new city/community have access to a supportive network to guide and follow them through the transition to enhance navigation and stabilization.
- The strategy should focus on the provision of medium-term transitional supports assisting with loss of connection to community, navigating culture shock, self-care when experiencing racism, and establishing a support system within a new area/community.
- The transitional support strategy should offer financial assistance with things such as security deposits, transitional and start-up allowances for shelter, basic needs, new job materials, fallback support due to job loss, financial arrears, etc.

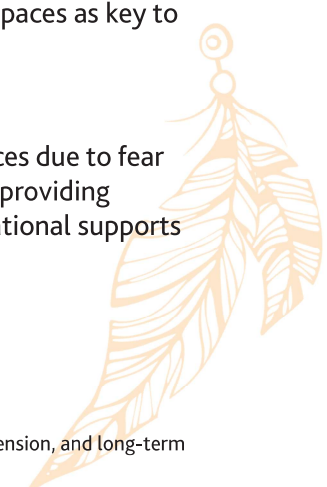
4) A Safety Strategy

- The strategy would assist clients experiencing issues such as unsafe living conditions, overcrowding, gender-based issues, unstable family dynamics, intimate partner relationships, navigating familial addictions, or lateral violence. The strategy should focus on providing a secure, supportive network to nurture clients' abilities to learn skills aimed at empowering clients' self-sufficiency to remove themselves from unsafe situations.
- Participants identified learning initiatives such as financial literacy ¹, budgeting and saving, boundary setting, healthy relationships, and building personal safety in unsafe spaces as key to supporting effective outcomes.

5) A Client Incentive Strategy

- The strategy would support clients who struggle with trusting individual resources due to fear of success, loss of IA eligibility, or self-confidence. The strategy should focus on providing information to enhance trust within services and supports, while offering navigational supports to empower clients when working towards their goals.

1 **Financial Literacy:** personal financial management, budgeting, saving, filing taxes, starting a child education fund, pension, and long-term investment education, etc.





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- Case management should focus on collaborating with clients on the development of wellness plans to build confidence, combat misinformation, reduce stigma, and shift the understanding of the IA Program.

Wrap-Around Programming

Leveraging a human-first approach to case management is essential in client-centered service delivery to support diverse client needs. The provision of wrap-around programming is imperative for working with clients who are starting from various places of wellness, to ensure they are properly supported to build skills and are empowered to set and achieve their goals.

Participants identified three levels of wrap-around programming to customize responsive supports offered to clients while working together to build the skills and confidence needed to enhance wellness and shift into job readiness. The three levels of programming are categorized as pre-readiness, building readiness, and ready.

Pre-readiness refers to foundational stabilization supports focused on basic life skills, personal well-being, and removing immediate barriers that may prevent clients from engaging in education or employment. Building readiness focuses on skill development and capacity-building support that prepares clients for workforce or educational participation. Ready refers to employment- and education-aligned supports that assist clients who have achieved stability and are prepared to transition into job placement, credential attainment, or labour market opportunities.

Pre-readiness

- Personal hygiene
- Life stabilization skills
- Mental health services
- Stable mental health services
- Functional literacy
- Financial literacy
- Formal documentation skills²

Building Readiness

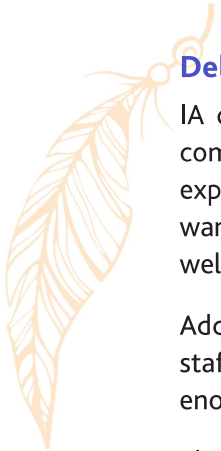
- Accessing adult education
- Resume and cover letter writing
- Interview skill development
- Accessing online training/courses
- Digital literacy

Ready

- Work placement programs
- On the job training
- Work exchange programs³
- Completing micro credentials

2 **Formal documentation skills:** building client understanding to complete ID applications, criminal background cheques, estate planning and navigation, and various other formal forms deemed necessary by IA workers.

3 **Work exchange programs:** partnerships with post-secondary institutions and other First Nations to expand knowledge, worldviews, and connections.



Delivering Case Management

IA case managers identified the need to be provided with flexibility to work with clients based on community-specific terms and not because the eligibility timelines for transitioning off a caseload have expired. Case managers should have the flexibility to support clients until they attain stability or are warmly transitioned to another service provider. IA workers know their clients' histories and experiences well enough to provide support up to their discretion.

Additionally, to maintain a person-first approach to services, caseloads need to be capped, and more staff positions need to be created. The existing staff positions and large caseload numbers do not provide enough one-on-one time with clients for goal setting and follow-through.

The reformed program needs to prioritize shifting the definition of client success within the IA Program from attaining education or employment to a more wholistic definition, including achieving goals and increasing wellness outcomes.

Session Three: Identifying First Nations Indicators for Success of IA Clients

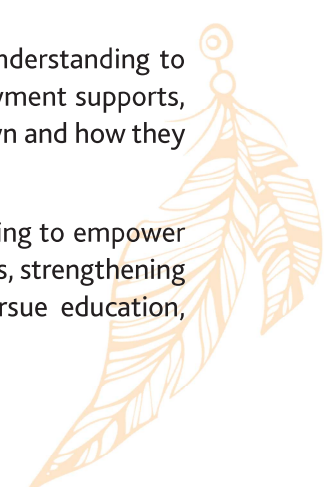
First Nations often advocate against a universal approach to the collection of data, and the use of indicator sets. Data collection and indicators within the program must be able to be adjusted at the community level to support First Nations who are self-determining their social programs and must account for how regional policies and funding agreements shape the administration of the program on a nation-to-nation basis.

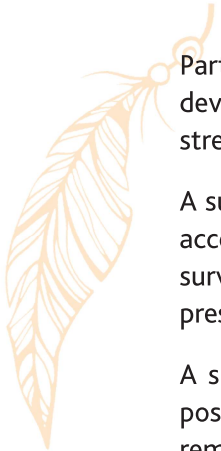
Since programs and services change from nation to nation, defining program success must also be customizable to reflect the differences across First Nations. Recognizing these variations, Session Three explored how client success within the IA Program is defined and measured by First Nations. The questions focused on redefining the current understanding of a successful IA program to align with the vision for the reformed program and identify potential indicators to measure success. Additionally, the session sought input from participants on potential barriers preventing First Nations from achieving those goals.

Defining a Successful Income Assistance Program

Reforming the definition of a successful IA Program requires the use of a wholistic understanding to account for the First Nations identified priorities for case management and pre-employment supports, in addition to measuring how each of the different program components works on its own and how they work together.

Participants broadly defined success within the IA Program as enhancing client well-being to empower stability and growth, through enabling meaningful participation within their communities, strengthening connection and self-reliance, and maintaining access to the supports needed to pursue education, employment, or other life goals.





Participants described the importance of healing and accessing all the necessary services for the development of life skills, such as community-based support systems and culturally appropriate strength-based programming.

A successful program can respond to the diverse needs of First Nations IA clients and strengthen their access to basic needs such as food security, housing, and transitional financial supports to shift from surviving to thriving. The program prioritizes client stability and independence instead of applying pressure to shift to employment or education.

A successful program provides support to the case managers and administrators by increasing staff positions within the program, providing flexibility on the terms for resource and services provision, and removing the eligibility requirements for types of training. Lastly, the program recognizes the need for additional support to First Nations clients with additional needs and can supportively address those needs in a barrier-free, simple, and supportive manner.

Measuring the Success of the Income Assistance Program

Participants identified four separate dimensions for potential indicators measuring whether the IA Program is achieving its goals that include client progress and engagement, accessibility, and integration of services, employment, and education outcomes and long-term wellness outcomes.

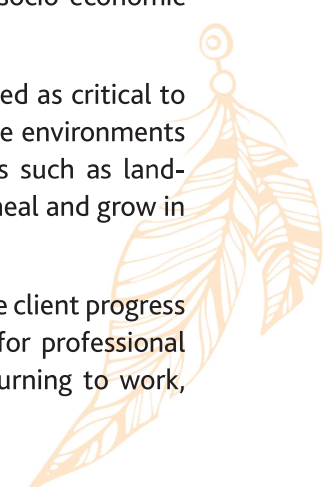
Participants defined both the program and client success as measurable strides towards clients' personal goals. Strides towards clients' goals should be supported through the development of action-oriented case plans and specific, measurable, achievable, relevant, and time-bound (SMART) goals to guide interactions between clients and case managers.

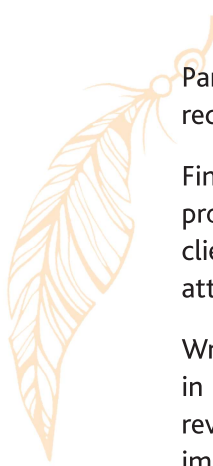
Utilizing SMART goals shifts the definition of program success to include celebrating all personal milestones, to build self-confidence, skills, and readiness. Participation in life skills development, job training, or educational programming can be used to measure client engagement and ensure the reformed program meets clients where they are at.

Improved flexible funding is required to enhance accessibility, increase the services offered within the IA Program, as well as support stronger integration of services to develop a coordinated, streamlined approach between IA and other social programs to reduce duplication, and bolster socio-economic outcomes.

Simplifying service navigation and reducing administrative barriers were also emphasized as critical to improving the overall client experiences and outcomes. Creating respectful and inclusive environments to reflect the diverse needs of IA clients by integrating culturally grounded supports such as land-based practices, elder guidance, and First Nations-led disability services to help clients heal and grow in alignment with their personal identities and experiences.

Employment and educational outcomes should be used as secondary indicators alongside client progress and engagement to support clients with either building stability or developing skills for professional readiness. The reformed program should focus on identifying the rates of clients returning to work, school, or accessing training programs as indicators of positive professional outcomes.





Participants also emphasized the importance of reduced caseloads to help bridge the gap between receiving assistance and entering the workforce in a sustainable, supported way.

Finally, long-term program effectiveness can be assessed by tracking client achievements such as program completion, certification, or sustained employment. Participants stressed the importance of clients reaching a point of self-reliance through stable housing, life skills development, and personal goal attainment.

Wraparound support models, especially those following a “circle of care” approach, were seen as vital in sustaining progress over time. Regular follow-ups, attendance tracking, and personalized progress reviews were recommended as practical tools for measuring outcomes and ensuring continuous program improvement.

Determining Program Effectiveness

The effectiveness of the IA Program is determined by how well it addresses both the immediate and long-term needs of First Nations clients. An effective program ensures clients are thoroughly supported throughout their interactions with the program. Diverse and adaptable strategies help ensure no client is left behind or pressured to meet program outcomes that do not reflect their starting point.

The integration of strength-based cultural elements and traditional knowledge, such as elders, peer mentorship, and language programs are seen as essential to building resilience, nurturing personal growth, and creating a sense of belonging. Cultural grounding supports overall well-being, making the program feel more aligned with clients’ identities and values.

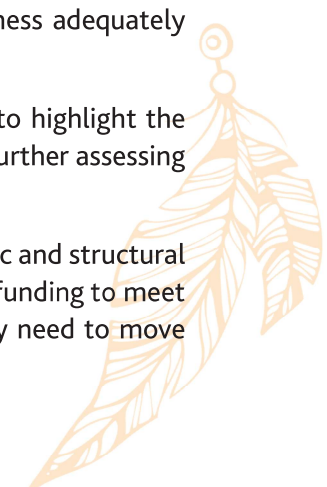
Program effectiveness can be measured through identifying the availability of partnerships and opportunities supporting clients’ self-sufficiency. Additional measurements should include the availability of job placements, options for training programs, and accessibility of different certifications for all clients, regardless of location.

To successfully determine the adequacy of the program, measurement needs to account for the impact of P/T policies and should be conducted regionally and not nationally.

Additional considerations are needed to account for First Nations living within specific zones in regions and away from local services and goods, to ensure assessments of program effectiveness adequately depicts First Nations realities.

Considerations for the state of economic stability within First Nations are necessary to highlight the impact of short-term funding on the services and supports offered within the program, further assessing how the impact is passed onto IA clients.

Overall, determining program effectiveness needs to account for the removal of systemic and structural barriers, such as bureaucratic red tape and stigma, along with the flexibility of program funding to meet the diverse needs of clients, to assess if the program provides clients the support they need to move beyond poverty and achieve self-determination.





Barriers to Client Success

Measuring the success of the IA Program needs to account for the diverse experiences and hardships for First Nations administering the IA Program caused by the systemic and operational barriers and the impact they have on both clients and case managers. Barriers such as infrastructure limitations, service accessibility issues, policy constraints, and socio-economic challenges make it difficult to fully recognize or support clients' progress.

Service gaps within First Nations caused by the division of funding, services, and program authorities across different regions and between various social programs create inefficiencies in service delivery and serve as barriers to client success.

Many communities lack essential services such as appropriate healthcare, food security programs, and after-hours supportive services, which are required to support day-to-day life. Service gaps are often exacerbated by a lack of infrastructure to allow supportive case management and skill development, resulting in clients leaving their communities to access work or training opportunities.

Policies around utility arrears and discriminatory practices at community resources, like food banks, can also create additional financial and social barriers for clients, undermining the program's ability to support clients effectively and inhibiting their long-term success.

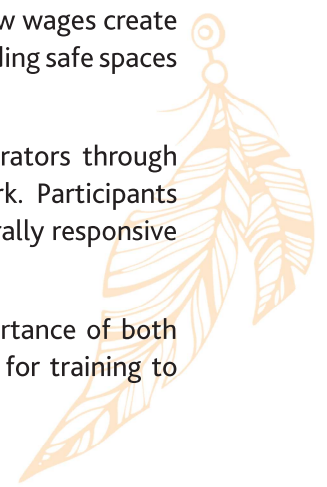
Common barriers impacting First Nations' abilities to provide a supportive IA Program include infrastructure issues, connectivity and staff shortages, funding limitations, and regional disparities. These barriers prevent client stability and growth and limit the provision of the services required for a successful IA Program. Addressing the barriers is crucial to improving outcomes and ensuring that the program can effectively meet the needs of First Nations clients.

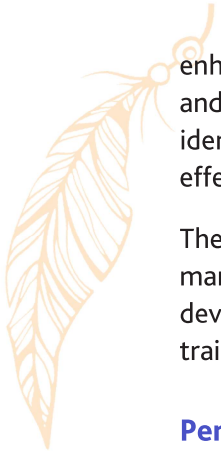
Session Four: Identifying Priorities for Training, Resources and Supports

First Nations case managers and administrators are often required to take on multiple roles, including crisis response, which reduces their ability to provide tailored case management to clients. The shortage of dedicated personnel further limits the program's ability to recognize and nurture client success. Additionally, high caseloads, staff shortages, high turnover rates, lateral violence, and low wages create difficulties in retaining staff. Case managers and administrators play a crucial role in providing safe spaces and effective programming for IA clients.

The session focused on identifying priorities to support case managers and administrators through training and resources, as well as priorities for developing a supportive peer network. Participants identified a wide range of training needs to support IA staff in delivering effective, culturally responsive services in their roles as case workers, managers, and administrators.

Feedback reflected a broad yet interconnected set of priorities, emphasizing the importance of both foundational and specialized skill development. Participants expressed a strong desire for training to





enhance technical competencies while recognizing the unique challenges of supporting their communities and strengthening their ability to navigate those challenges. Providing training opportunities for all identified priorities will better equip frontline staff to provide compassionate, culturally grounded, and effective support.

The priorities were grouped into the following key areas: Person-first service delivery and self-care, case management and client navigation, policy administration and technical skills, professional and leadership development, navigating conflict and workplace safety, and health and specialized medical awareness training.

Person-First Service Delivery and Self-Care

Participants strongly emphasized the need for training to support the provision of person-first service delivery, including enhancing worker capacity to navigate hardships with clients and practice self-care. Key topics included culturally appropriate trauma-informed care training, addressing vicarious trauma and burnout and navigating work-life balance, to learn practical strategies for self-care and coping for both client and worker wellness.

First Nations and non-First Nations service providers should have mandatory cultural competency training to understand First Nations histories and incorporate traditional knowledge and Indigenous-specific service delivery models within programming. Additionally, mental health training is a key priority to support trauma-informed service delivery, with interest in areas such as mental health awareness, mental health first aid, and understanding trauma compliance standards.

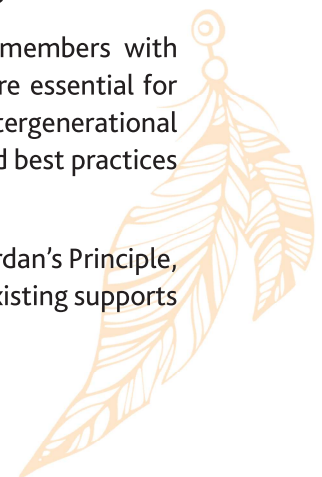
Intergenerational trauma and mental health significantly impact the types of interactions between case managers and clients. Training to support workers' abilities to navigate all interactions is integral to enhancing staff capacity to support their clients more effectively while providing them with the necessary skills to manage their own well-being.

Case Management and Client Navigation

Participants identified an essential need for improved training to align with the new priorities for case management. Access to standardized job training in areas such as case management fundamentals, social program navigation, NIHB processes, and ISC service planning was identified as necessary.

Key skills, such as motivational interviewing and interview preparation to support members with additional accessibility needs in preparing for various types of program assessments, are essential for service delivery. Conversations highlighted the importance of strategies addressing intergenerational dependence, intervention, and prevention, supporting families impacted by addiction, and best practices for supporting clients navigating aftercare.

Additional training in understanding and navigating complementary programs, such as Jordan's Principle, would better equip workers to make appropriate referrals and strengthen knowledge of existing supports across programs.





Policy, Administration, and Technical Skills

Participants highlighted the importance of attaining training to advance administrative skills as a key priority for implementing strong IA Programs and increasing professional development opportunities. IA workers identified diverse types of training needed to support them within their positions, including proposal writing, budgeting and financial reporting, data management, and policy interpretation at the federal and P/T levels.

Training to support the development of a variety of office skills, such as computer programs like Excel, case note documentation, and report writing, was identified as important to create efficient and effective service delivery.

Lastly, training on the use of technology to support competency for the use of data collection tools and systems was identified as a priority for supporting case workers to effectively document and track outcomes, use data to support program development, and empower a strong, client-centered approach in their work.

Professional and Leadership Development

Accessing training to enhance professional development, organizational growth and leadership skills was a recurring theme from participants. Increasing access to standardized supervisor training to learn the skills required for career advancement and future transitions to leadership was emphasized.

Skills such as effective team building and communication, project management, and networking skills were identified as important for transitioning from a job to a career. The reformed program should build opportunities for IA workers to network with external partners, and leverage 'train-the-trainer' programs to ensure knowledge transfer within regions, across First Nations, and across teams.

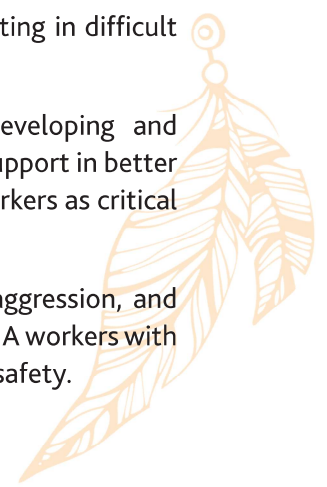
Additionally, participants identified interest in accessing ongoing education opportunities for workers to access certification programs and continuous professional development initiatives to build long-term skills.

Navigating Conflict and Workplace Safety

Workplace safety and crisis response were identified as key concerns for IA workers. IA workers are often the first point of contact for members experiencing several types of vulnerability, resulting in difficult client interactions and issues with personal safety.

Participants stressed the need for training in conflict resolution, self-defense, developing and administering personal safety strategies, and de-escalating difficult client interactions. Support in better managing situations involving client outbursts or aggression was also identified by IA workers as critical to providing safe case management.

Learning how to navigate difficult conversations, personal safety when dealing with aggression, and supporting client aftercare for individuals in crisis were identified as critical skills to equip IA workers with the skills they need to effectively manage difficult client interactions and maintain staff safety.





Health and Specialized Medical Awareness Training

Health and specialized medical training were highlighted as beneficial for IA workers to support clients with additional needs. Specific training in Fetal Alcohol Spectrum Disorder (FASD) would build a better understanding of how to support clients with unique needs.

Access to training to build a more comprehensive understanding of common health concerns would allow case workers to support clients with discussions around health-related symptoms, make appropriate referrals, and support a continuum of care for individuals with additional needs.

Lastly, additional training for IA workers on substance-use trends, how to support people who use substances, and administering Naloxone was identified as important. Training on common health experiences of First Nations is important for reducing re-traumatization, reducing stigma, and navigating all client interactions with a person-first approach.

Structure and Key Priorities of Designing a Peer Support Network

The development of a peer support network to assist IA workers within their positions is integral for networking, information sharing and building a central location to share resources and access support. Participants provided valuable insights on the design and priorities of a permanent peer support network, emphasizing the importance of collaboration, resource sharing, and ongoing engagement.

Participants identified structuring a peer support network through three different channels, including regional, national, and nation-to-nation, to separate support based on need and ensure collaboration across all levels.

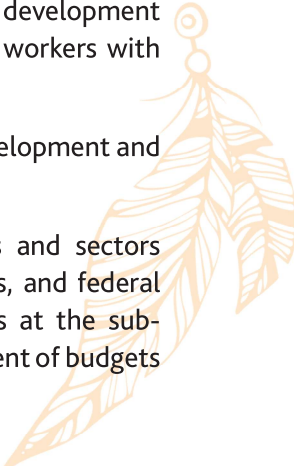
Regional networks are envisioned to have a focus on localized needs, cost sharing, and strengthening collaboration within specific program areas. National networks offer the ability to connect with professionals across regions, allowing the sharing of best practices, training opportunities, and funding strategies.

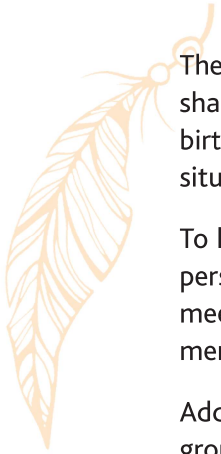
The Nation-to-Nation approach was suggested to develop and nurture stronger relationships between First Nations and build trust and competency in working with municipal, P/T, and federal partners.

A key priority for the development of a supportive network is to have centralized information sharing, such as a database with funding opportunities, regular updates from ISC and the AFN, and development of a directory or systems inventory of the various programs and services to support IA workers with systems navigation.

The centralized space would support IA workers in identifying and sharing professional development and capacity building opportunities to share best practices and recognize contributions.

Collaboration was another major theme to strengthen partnerships across programs and sectors to maximize available supports, including working with municipalities, P/T governments, and federal agencies. Additional collaborative efforts would include forming technical partnerships at the sub-regional level. Increased mentorship opportunities to help First Nations with the development of budgets for various funders.





The network should also provide direct support for clients. Participants suggested developing resource-sharing initiatives to address client needs, to share solutions for specific challenges, including missing birth certificates, safety mechanisms for reporting violence, and resources to help navigate critical situations.

To keep the networks active and effective, participants suggested hosting quarterly meetings either in person or virtually, to support information sharing and ensure regular discussions. In addition to quarterly meetings, participants suggested the use of online platforms such as forums, blogs, or apps where members could connect to share opportunities, seek or offer support, and exchange ideas at any time.

Additionally, participants expressed openness to further engagement through committees and leadership groups, as well as workshops and panels with guest speakers to guide discussions on policy and operations, and to support knowledge sharing and learning.

The peer support network should leverage cost-sharing strategies to ensure sustainability. Participants also suggested providing resources within the program to create in-office networking spaces, such as forums or blogs, to provide debriefing opportunities for IA workers and facilitate ongoing discussions between workers working in the same community or tribal council.

Session Five: Identifying Priorities for Implementing Disability Funding Within the IA Program

First Nations continuously advocate for enhanced supports for First Nations clients with special needs to reduce navigation barriers through a streamlined approach to services and supports. Often, First Nations with diverse needs are sent to different programs to fill separate needs required within their care.

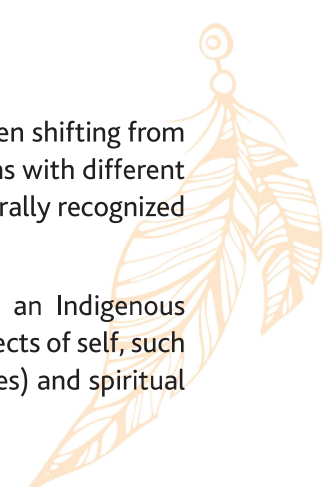
Inconsistencies in care caused by fragmented access to programs and services will not be resolved through IA Program reform alone. Strengthening wrap-around services and supports for clients with special needs is critical to improving the overall quality of life for those with additional needs.

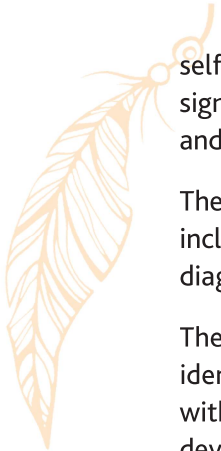
The session focused on defining First Nations concepts of disability, establishing culturally appropriate eligibility criteria for disability benefits, and examining the most common experiences, barriers, and existing best practices in service delivery for IA clients with additional needs.

Key Considerations for a First Nations Definition of Disability

First Nations understandings of disability are rooted in the core values of belonging, often shifting from deficit-based terminology and using strengths-based terms such as First Nations persons with different abilities (PWDA). First Nations PWDA are often seen as having special gifts and are generally recognized as having an important role within their communities.

Participants emphasized the importance of the IA Program defining disability using an Indigenous holistic worldview and recognizing that different abilities can exist across different aspects of self, such as the physical, mental (academic), emotional (trauma responses/behavioural difficulties) and spiritual





self (sense of belonging, self-worth and connection/participation). First Nations' histories include significant amounts of trauma, which has had a profound epigenetic impact on many of the survivors and their families.

The recognition of different abilities reaches beyond the scope of a medical understanding and should include invisible disabilities. Invisible disabilities can be trauma responses that do not quantify a medical diagnosis but cause the same symptoms of a diagnosis, which impact a person's ability to work.

The reformed program needs to remain flexible and incorporate guidelines to ensure the ability for self-identification and observation of the issues outside of a medical diagnosis, particularly for those in areas with limited access to medical care. Recognizing an individual's history and upbringing can support the development of meaningful approaches to break cycles of trauma, reduce trauma responses and build employability in individuals as their wellness improves.

Additional considerations and supports are necessary for IA clients and their caregivers needing to travel outside the community to access specialized medical services, and care must not be based on P/T comparability, as the cost of travel and remoteness for many First Nations precedes the costs for non-Indigenous individuals in urban areas.

Unpaid caregiving is often a reality for many First Nations and depending on the level of care a person requires, the caregiver might not be able to access regular employment.

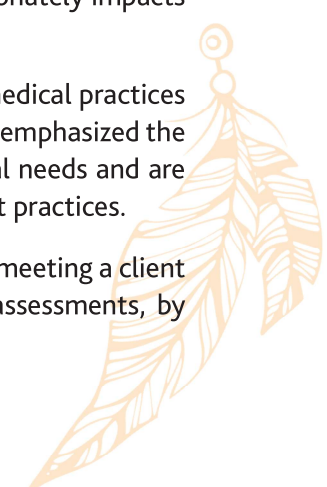
Culturally Appropriate Ways to Determine Eligibility for Disability Benefits Within the IA Program

Leveraging First Nations understandings of disability within the reformed IA Program is important for building a culturally responsive program. Participants emphasized the importance of ensuring eligibility for disability benefits within the IA Program reflects First Nations' understandings of disability. Including, incorporating a trauma-informed lens by recognizing the impact of intergenerational trauma and the related behaviours, impacting an individual's ability to function and maintain employment.

Currently, doctors determine the client's employability, but many practitioners are not used to dealing with clients with complex trauma and lack the cultural understanding necessary to thoroughly make these decisions. Additionally, the gender-bias within the health care system disproportionately impacts women, with the potential to perpetuate further harm to First Nations matriarchs.

Culturally appropriate ways to determine eligibility will consider the lack of access to medical practices within remote communities and create flexibility for determining eligibility. Participants emphasized the importance of being supported to identify and advocate for clients who have additional needs and are unable to work through advocacy or support letters and circle-of-care case management practices.

Culturally appropriate methods of determining eligibility must share the same values of meeting a client where they are at with kindness and respect, and reducing the stigma surrounding assessments, by ensuring First Nations languages and paradigms are incorporated.





Assembly of First Nations

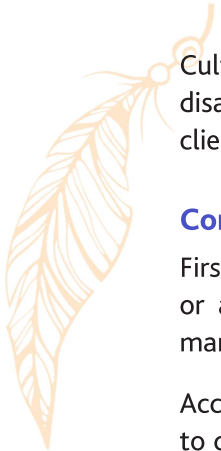
5th Annual National Forum on Income Assistance:

From Surviving to Thriving



WHAT WE HEARD REPORT

SEPTEMBER 10-12, 2024 • CALGARY, ALBERTA



Culturally appropriate determination of eligibility needs to account for short-term versus long-term disabilities, and work to reduce the reporting burden on First Nations by limiting the need to resubmit client eligibility on an annual basis.

Common Experiences and Barriers for IA clients with Different Abilities

First Nations PWDA often face significant barriers when trying to access social events, programs, or appointments. Limited infrastructure and resources to create accessible spaces to provide case management and host social events make it difficult to strengthen inclusion.

Access to resources to ensure roads are wheelchair safe or to build outdoor spaces within communities to connect people to the land is important for building connections and enhancing wellness. Access to accessible transportation is often not available or is extremely expensive and not covered by programs. Additionally, the existing programs and services for PWDA are spread out across different social programs, resulting in clients having to access multiple programs to receive support for different needs.

Understanding the common experiences and barriers for First Nations PWDA is important for reforming the IA Program to be inclusive and supportive for all. Additional considerations and priorities for First Nations PWDA have been identified by participants during each of the sessions, highlighting the importance of embedding inclusivity and safety for all within the reformed program.

Looking Ahead

The voices of First Nations IA workers are critical for the development of a framework to guide the implementation of the First Nations' developed policy recommendations. The conversations mapping out priorities and considerations for each of the policy recommendations will remain ongoing until all the program administration nuances are brought to the forefront.

Participants reinforced the importance of modernizing IA programs through enhanced partnerships, streamlined service delivery, and long-term funding stability. A successful program must meet clients where they are and equip them with the tools for success, while recognizing that success looks different for each client.

The insights, conversations and lessons learned during the Forum strengthen the AFN's advocacy and is a piece of the blueprint to implementing First Nations-led reform of the IA Program.





Annex A: Breakout Session Questions

Breakout Session: Identifying Hidden Costs for IA Clients

The following three questions guided dialogue on identifying the hidden costs for IA clients.

- 1) In your community, what are the hidden costs your clients experience that are not covered by the financial support they receive from the IA Program? Ex. Utilities, clothing, childcare, transportation, etc.
 - a. Among the hidden costs listed above, what are the reasons they are not covered?
- 2) Based on client demographics, how are your clients affected or impacted by the IA Program? Examples of demographics include sex, gender, age, health status, persons with a disability, household compositions etc.

Ex. Multiple adults in a household are dependents when they are residing there due to lack of available housing.
- 3) What are the most frequently requested “special needs” supports or expenses your clients experience, and how often are you unable to approve them due to lack of available financial resources or approved expenses within the IA Program?
 - a. How do you support clients in covering these costs? Ex. Submitting Jordan’s Principle requests, band covering expenses, etc.

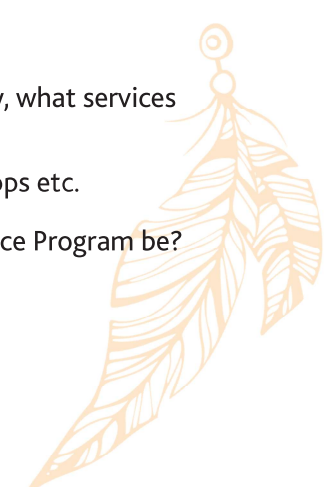
Breakout Session: First Nations Priorities for Case-management and Pre-employment Supports

The following five questions guided dialogue on identifying priorities for case-management and pre-employment supports for the reformed IA Program.

- 1) In your experience, what community-specific factors, strengths, strategies, and challenges are important for the design and delivery of case management and pre-employment supports?
- 2) If you could create your own terms for how you administer case management to your clients, what would they be?

Ex. caseloads, goal setting, professional development, etc.
- 3) If you could develop your own pre-employment support program in your community, what services or programs would you offer and how would you administer them?

Ex. youth specific strategies, financial literacy, resume development, excel workshops etc.
- 4) What should the goal of case management services in the reformed Income Assistance Program be?
- 5) What services, supports, and programs are needed to achieve the goals?





Breakout Session: Identifying Success within the IA Program

The following three questions guided dialogue on identifying success within the IA Program.

- 1) How would you determine the success of the Income Assistance Program within your communities? What does a successful program look like and how does it support your clients?
 - a. What identifiers for success would you use based on your definition of what a successful program looks like and the way in which it supports your clients?
Ex. Achieving goals, increasing professional development, etc.
- 2) How would First Nations determine if the Income Assistance Program adequately responded to the needs of their clients?
Ex. My clients reach goals we set together, my clients were able to access a support program to increase their well-being, etc.
- 3) What are the barriers to identifying client success within the Income Assistance Program?
Ex. My clients are job ready but need to travel or move out of the community to work.

Breakout Session: Identifying Priorities for Training, Resources and Supports

The following three questions guided dialogue on identifying priorities for training resources and supports.

- 1) In your experience as a case worker, manager, or administrator, what types of training topics and professional development activities are key priorities to support you in your positions and why?
Ex. excel, trauma informed care, proposal writing, budgeting, lateral violence, etc.
- 2) If you could design a permanent network or networks of peers to support you in your work, how would you create that network and what are key priorities to discuss within the network?
Ex. regional or national network to meet quarterly and discuss providing services not approved within the region or a national virtual network with online forums and meetings to discuss best practices.
- 3) What are examples of an organizational model for programs or networks that support this work or professional development of workers in social assistance or similar fields in other jurisdictions?
Ex. provincial, interprovincial, etc.?





Breakout Session: Identifying Priorities for Implementing Disability Funding within the IA Program

The following four questions guided dialogue on identifying priorities for implementing disability funding within the IA Program.

- 1) What are some key considerations for defining a First Nations definition of disability within the Income Assistance Program?
- 2) What is a culturally appropriate way to determine eligibility of the disability benefits within the Income Assistance Program?
 - Ex. Developing a program-specific First Nations assessment tool and training for case managers to assess.
- 3) What are the most common experiences you see among the Income Assistance recipients with different abilities you work with?
 - a. What additional barriers do they face?
- 4) If you could expand any existing service/program or provide a new service or program to support your clients with disabilities, what would they be and how would you implement them?





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