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February 10, 2015

The Honourable Dr. Helena Jaczek  
Minister of Community and Social Services  
80 Grosvenor Street, 6<sup>th</sup> Floor  
Hepburn Block  
Toronto, Ontario  
M7A 1E9

Dear Minister:

As you are all too aware, since the introduction of the Social Assistance Management System (SAMS) in November 2014, frontline Ontario Works (OW) staff have struggled to achieve the same high standard of service in social assistance delivery that they previously provided under the SDMT system.

As the union representing OW workers, the Canadian Union of Public Employees (CUPE) has always asserted that the resulting crisis in standards is entirely due to significant problems with the functionality and performance of SAMS technology. This is the reason that CUPE welcomed the government's third-party independent review of SAMS: we saw the review as a development that could help to resolve the ongoing turmoil in OW workplaces as result of the performance of SAMS technology.

Given the chaos of the last six months, we did not imagine that a root-and-branch review of SAMS was an unreasonable expectation. Indeed, we were encouraged by your own words, heard in an interview with CBC on February 11 on CBC radio in Ottawa: "... I do want them [the independent third-party advisors] to look at the system as a whole and to see if there is not any opportunity for re-design to simplify the work that a case worker needs to do in terms of data entry so they can get to the work they want to do which is help their clients, vulnerable Ontarians."

However, our recent experience with the review process has left CUPE members and representatives with grave concerns about the scope of the review and its ability to produce any satisfactory or significant outcomes for SAMS users and OW recipients. We speak in particular about March 24's interview between CUPE representatives' and the project team from third-party advisor PricewaterhouseCoopers (PwC) and the interim report released on April 1<sup>st</sup>.

Our misgivings began when the limited scope of the review became apparent to us. Both the information shared in the March 24 interview and the project review materials provided by PwC made plain that that the independent review was not designed to address SAMS' functionality or technical deficiencies at any level. The interim report, with its undue emphasis on workers being 'overwhelmed' by SAMS technology, only served to confirm this impression.

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Fred Hahn  
President

BUILDING A BETTER ONTARIO

Candace Rennick  
Secretary-Treasurer

Minister, it was solely to address the issues of SAMS functionality and technical deficiencies that CUPE agreed to support both the earlier IT working group and the independent review. Now, having taken part in the review process and having read the interim report, we are left with major concerns around issues of scope.

We maintain that, if it is not to be perceived as a whitewash, the review must ensure substantive and constructive coverage of SAMS' technical and functional issues. I urge you to examine the options below and to avoid a limited scope that will ultimately undermine the use and value of the review's results.

CUPE seeks an independent review whose scope includes

- an analysis of the needs, wants, and limitations of end-users
- standard supports for workers
- steps to minimize health and safety issues
- an approach to minimize the impact on social assistance clients
- timelines and resources for the fixes.

Under an enhanced scope, a review would assess the following areas of greatest concern to CUPE members:

### **User-centred design for SAMS**

Technology rooted in user-centred design would allow Ontario Works staff to provide the best possible supports and services to the people they support. Fundamentally, we believe technology should help workers do their jobs, not hinder them as SAMS currently does.

The ISO standard on human-centred design for interactive systems includes the following key points that are fundamental to this approach:

- The design is based upon an explicit understanding of users, tasks and environments.
- Users are involved throughout design and development.
- The design is driven and refined by user-centered evaluation.
- The process is iterative.
- The design addresses the whole user experience.
- The design team includes multidisciplinary skills and perspectives.

## **Supports for workers**

The scope of the review should include an analysis of standard supports that should be available to Ontario Works staff throughout the province, given the increased workload and stress related to SAMS' functionality. In our survey of CUPE members, workers wrote of high levels of stress, lack of confidence, falling behind at work, burn out and challenges in providing services to clients. Some employers have been providing supports to staff such as counseling through the Employee Assistance Program or additional staffing. The review should assess supports that have been provided throughout the province and recommend a baseline of supports that should be provided to all staff until SAMS is functional.

We have also heard that many staff are concerned about the impact of SAMS on their health and safety, particularly related to the number of mouse clicks necessary to navigate the system. We recommend that this be assessed in the review and that steps be recommended to address this situation. Again, referring back to a user-centred design, the number of clicks should be minimized and data should not have to be entered more than once.

## **Impact**

The review should also include a thorough analysis of steps to be put in place to minimize the impact of SAMS on social assistance clients. We have heard of the serious impact on many recipients ranging from not getting cheques, to receiving the wrong amount of money on cheques. This is in addition to the long line ups, long wait times on calls and lower levels of service clients receive at Ontario Works offices—all due to issues with SAMS. The review should include a comprehensive plan to minimize the impact on clients. These recommendations should be determined based on interviews and discussions with social assistance recipients and their advocacy organizations.

## **Timelines and resources**

CUPE believes the review should provide a rigorous assessment of the timelines and resources necessary to resolve all current issues and achieve a user-centred design. This should include the steps and benchmarks to measure progress along the path. Though many system fixes have been implemented, four months into implementation, SAMS is still plagued with problems. Workers and social assistance clients need to know how long it will take to achieve a functional system and ultimately a user-centred system. The required staff will need to be detailed from front-line municipal staff, to technical support staff, to IT development staff. A detailed assessment of the financial resources necessary at each stage for the system fixes and functionality improvements should also be included in the review.

## Impact of SAMS vs. SDMT

We believe the review scope should include a comprehensive assessment of how to move forward with the least impact on social assistance recipients and front-line staff. This should include an evaluation of whether it is practicable to continue with SAMS altogether given the timelines and resources necessary to achieve system functionality. The review should also assess whether the timelines make it more feasible to revert to the previous system, SDMT, until a fundamental redesign of SAMS is completed. Front-line staff and the people they serve should not be expected to bear the brunt of a fundamentally flawed system. If SAMS cannot be made functional and user-centred within a reasonable timeframe, it is critical for the review to evaluate alternatives.

We believe that SAMS in its current form is not fit for purpose as a system for managing modern and professional social assistance services. And the fact that a terrible 'new normal' has settled across most OW workplaces does not mean that SAMS and the turmoil it has created should be tolerated.

That is why CUPE is calling not only for an expanded scope to the current independent review, but also for a temporary suspension on the use of SAMS at Ontario Works. We would furthermore advocate a return to the SDMT system for as long as it takes apply a proper fix to the entire SAMS system.

Taking this admittedly drastic step would allow sufficient time and resource to be put toward building a system that adequately meets the needs of social assistance recipients, workers and government. To do otherwise simply continues the 'band-aid' approach of half-measures that is currently underway.

Our call for a shut-down of SAMS and return to SDMT does not preclude CUPE's participation in the ministry's independent review or in the IT working group. Rather, it reflects the urgency of our members' demands and offers the opportunity for restoration of sanity to OW workplaces, respite for workers and improved levels of service to vulnerable Ontarians who rely on social assistance.

We hope you will consider both the revisions to the scope of the independent review and our urging for a temporary shutdown of SAMS. Your positive response to these requests will not only renew our confidence in the government's determination to return to a high-quality quality social assistance program in Ontario but also ensure CUPE's continuing commitment to these efforts.

Sincerely,



Fred Hahn  
President

Cope343

Ministry of Community  
and Social Services

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APR 30 2015

Mr. Fred Hahn  
President  
Canadian Union of Public Employees (CUPE) Ontario  
1-80 Commerce Valley Drive East  
Markham, Ontario  
L3T 0B2

Dear ~~Mr. Hahn~~ <sup>Fred</sup>:

Thank you for your letter regarding the Social Assistance Management System (SAMS). I am pleased to respond.

It is important to hear from both you and your members about the challenges staff are experiencing. We acknowledge the challenge that a transition of this complexity represents both for our staff and those of our municipal delivery partners. We also understand the stress and frustration which some staff are experiencing during the early days of adopting this important new technology. I and my ministry have been listening and responding to these concerns but we need to do more. The implementation of SAMS must be improved.

As you note, an independent, third-party advisor, PricewaterhouseCoopers (PwC) is consulting with front-line ministry staff and municipal partners to evaluate SAMS implementation to date. Based on these consultations, PwC will also provide recommendations for short- and long-term improvements, building on our planned efforts to reach our goals.

We will receive a final report by April 30, 2015 which will include feedback on where our plans are working and where we can further strengthen our implementation activities, as well as short-term and longer-term recommendations for the future of the system.

To be clear, this includes advice as to how to best approach the process to address the functionality concerns your members have raised. We anticipate the third party report will help provide advice as to how best to achieve our mutual goals.

We need to make sure we are focused on the right priorities at the right time and moving in the right direction in reforming and updating our social assistance system. Having an independent assessment from PwC will help us achieve this goal, and ensuring that the processes to continuously address system defects, enhance usability as well as ensuring staff supports are in place.

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We are committed to fixing outstanding issues with the system. We continue to make progress and implement system fixes on a regular basis. The input we have received from our Ontario Works partners through the SAMS Technical Working Group has been important in coming to a shared understanding of the critical issues, developing a comprehensive assessment of those outstanding issues and a detailed priority list to address issues over the next two months. To date, we have implemented over 80 per cent of changes based on input from this group and we will increasingly focus our efforts on system enhancements.

As well, we have increased meaningful and collaborative engagement opportunities with front-line staff and our municipal service delivery partners. We have established a Front-Line Staff Working Group to support ongoing improvement efforts on SAMS implementation by providing direct input on the supports, tools and business processes needed to improve the front-line staff experience.

This working group is expected to provide input on:

- System improvements and fixes, including priority setting
- Learning and training supports and strategies including both content and approach to delivery
- Business processes improvements
- Approach to communication to front-line staff
- Other supports

With respect to reverting to the obsolete SDMT system, this would be neither feasible nor responsible, and any attempt to do so would result in major issues for staff, delay cheques for clients, and create greater confusion.

I have a mandate to lead a comprehensive reform of social assistance and to ensure that vulnerable Ontarians are getting the services and the supports that they need. This cannot be done with yesterday's technology.

I want to thank you again for your advocacy and partnership in working to implement SAMS. We share the same goal of ensuring we have the right tools in place to serve our province's most vulnerable people.

Once again, thank you for writing.

Sincerely,

A handwritten signature in black ink, appearing to read "Helena Jaczek". The signature is written in a cursive style with a large, sweeping flourish at the end.

Dr. Helena Jaczek  
Minister