



Unlocking Funding and Client Capacity Through Person Centered Service Models

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What we've learned from MCCSS and OASOS/DS members

Journey to Belonging: Choice and Inclusion

Developmental Services Reform Framework

What we've learned from MCCSS and OASOS/DS members

Simplified access to services

Reduce wait times and simplify onboarding

Person Centered Service Experience

We plan to make services better and easier for you and your family to use.

Provide better information so you can choose the right services for you

Self-directed and flexible Support

People have more control over directing and managing their funding and supports

Technology and Tools

Try new ideas to improve the service you get.

Use different tools and technology to help you be more independent and take part in the community

What we will cover today

- Introduction
- Person Centered Service Model
 - Modernizing Intake and Service Navigation
 - Enabling Fee-for-Service Model
 - Modernizing Client Engagement
- Pilot Program Demo
- How you can participate

About Process Fusion


We are the back-office technology of provincial programs and community service organizations




Passport Program
Funding for community participation services and supports

\$700M **60,000**

Program Funding Clients



Ontario Health



New Brunswick
CANADA

20+M

Referral Intake Processing

Aligned Goals and Missions

Sample –Strategic Goals

- Diversification of funding sources and sustainable funding
- Grow capacity to support our participants, staff and services.
- Demonstrate the effectiveness and efficiency of our work through evidence informed practice
- Continuous quality improvement, applied research and the strategic use of technology.
- Continue to explore and integrate technology across our services and infrastructure and responsibly leveraging new tools to enhance service effectiveness and improve the lives of those we support

REDUCE STAFF BURNOUT



Streamline processes

INCREASE CAPACITY – Client and Staff



Do more with less

IMPROVE SERVICE DELIVERY



Client Engagement and
Accessibility

GROW FUNDING AND SERVICES



Add new streams+ Fee for
Services

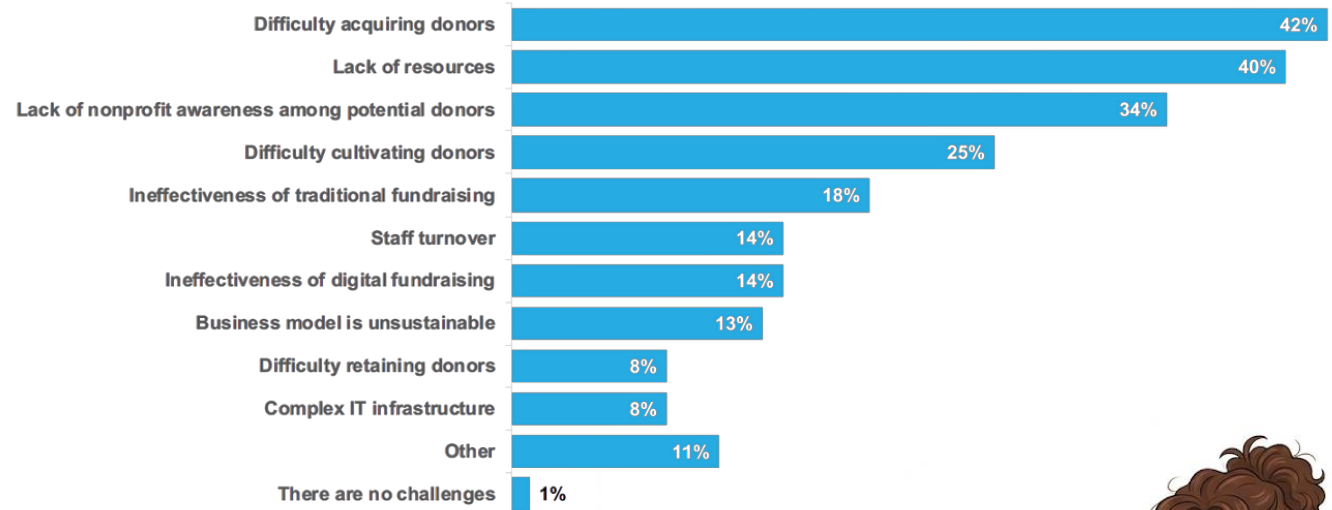
Admin burden erodes direct client service time

68%

Admin Burden

68% of staff in not-for-profit service centers are provided paid time for documentation, meetings, and program planning, yet the growing complexity and frequency of these tasks often erodes direct client service time.

Figure 2: Nonprofits' Leadership Challenges



Source: Statistics Canada



Current State of the Social Service Sector

Frequent staff departures drive employees into exhaustion

26%

Staff turnover

In 2025, 26% of Canadian nonprofits indicated experiencing 1–10% staff turnover, while 17% reported turnover exceeding 10%.

Figure 4: Nonprofits' Ways To Improve Staff Satisfaction and Reduce Burnout



Source: Statistics Canada



A negative relationship between administrative burden and program take-up rates: the more complex or repetitive the agency paperwork, the lower the rate at which clients access needed services and supports.

MULTIPLE FRAGMENTED SYSTEMS IN SOCIAL SERVICES.

ACCESSIBILITY SERVICES AND BILLING

- CareDove
- My Community Hub
- Jane App



BOOKING AND RESOURCE MANAGEMENT

- CareDove
- Jane App
- Calendly

HRIS systems



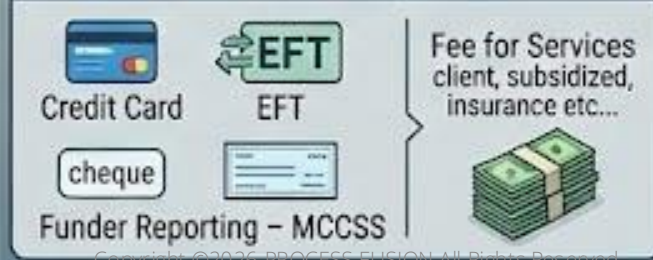
CASE MANAGEMENT

- EMHware
- Caseworks
- AIMS
- Vital Hub
- Alaya Care



PAYMENT PROCESSING

- Credit Card
- cheque
- Funder Reporting - MCCSS
- EFT
- EFT
- Fee for Services client, subsidized, insurance etc...



CLIENT PORTAL

- CRM Vendors

Under development 1-2 years now



SERVICE EVALUATION

- GreenSpace



AI TOOLS

- Co-Pilot
- SIY
- Dragon



REPORTING AND ANALYTICS

Built into CRM tools

- Power BI
- Crystal Reporting etc...



Key Challenges

Slow to grow fee-for-services (self-funding) and ministry funded programs

- ⦿ Complex billing, subsidized/funded/fee for service processes make it hard for agencies to manage/expand
- ⦿ High administration limits the capacity of Agencies/TPA's to support more clients

Accessibility limitations

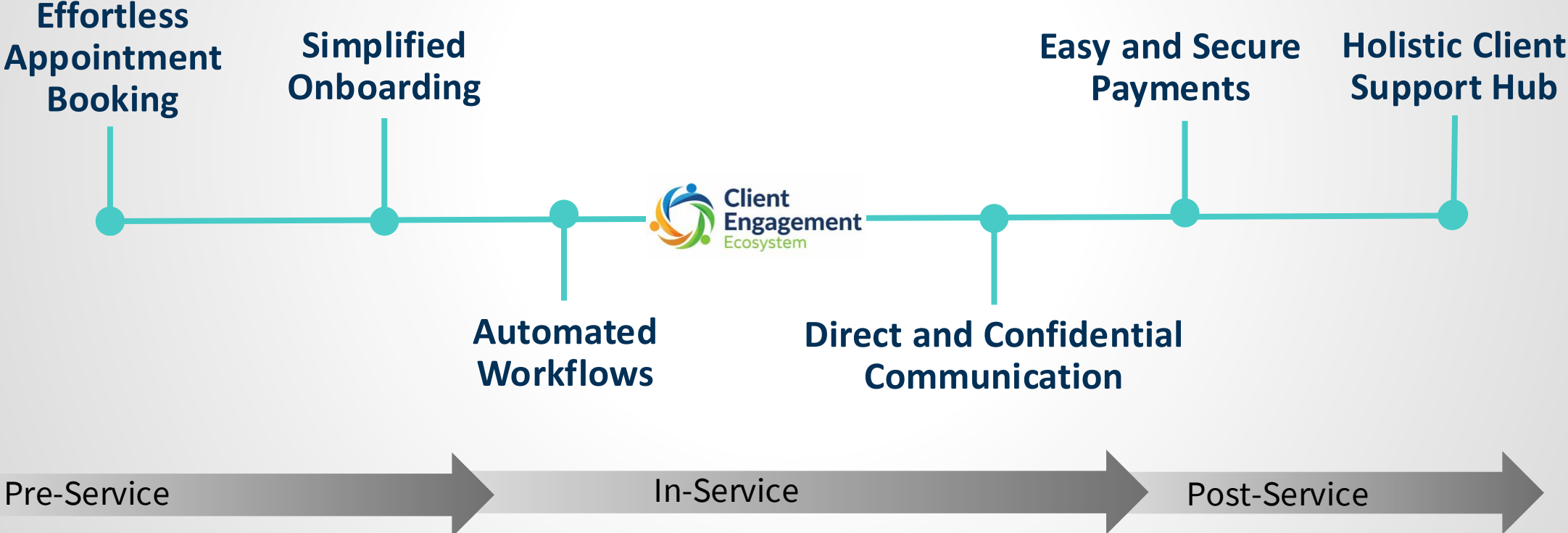
- ⦿ Easy to access services are not combined with simplified service admin work
- ⦿ Tools exist that do each, but nothing available that can do both
- ⦿ Reliance on vendor promises and product roadmap

Manual Friction

- ⦿ Staff Burnout: High error rates and time-consuming workloads lead to administrative exhaustion.
- ⦿ Client Frustration: Disconnected intake and repetitive forms result in long wait times and a poor service experience

Technology investment and change management

Client Engagement Ecosystem



What a Client Engagement Ecosystem can provide:

● A purpose-built digital ecosystem for social services delivery

- Creates a unified approach between client engagement and staff
- Has the flexibility to integrate with existing legacy/ministry systems.

● A more cost-effective and sustainable approach

- Reduce costs by eliminating multiple disconnected systems and licenses
- Redirect staff savings/hours from administration back into frontline services
- Support more clients with the same resources
- Reduce staff burnout

● Grow revenue and maximize funding utilization

- Fully automate complex fee-for-service and billing processes.
- Simplify multiple funder administration requirements
- Easily add new programs/services

● Deliver better client experiences and outcomes

- Give clients greater control over how they access, communicate and manage services.
- Improve accessibility, engagement, and service utilization.
- Automate onboarding

Client Engagement

Intake and Service Navigation

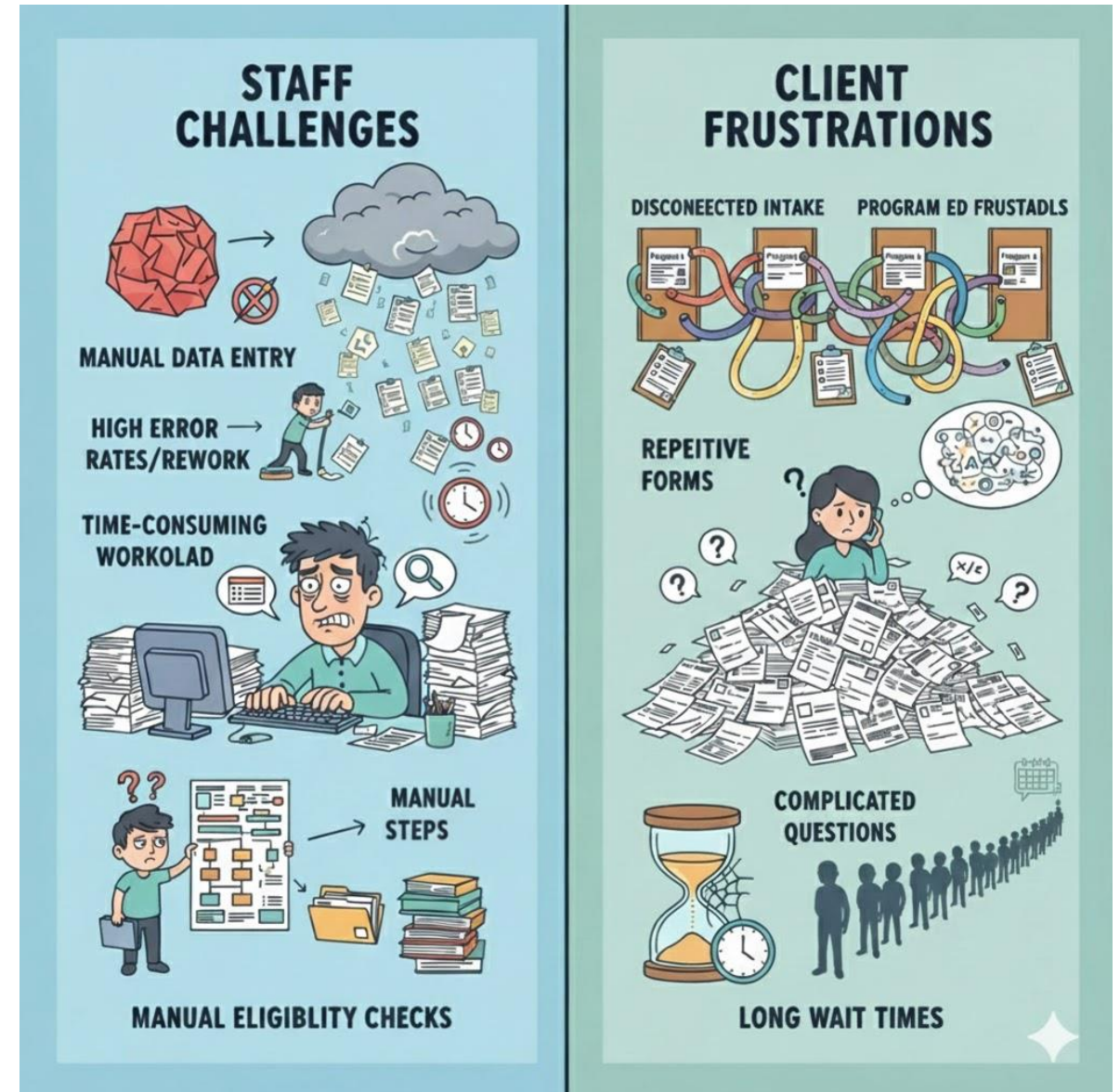
TRADITIONAL INTAKE

Staff

- Static service description pages on website
- Simple inquiry / request form
- Time-consuming workload management
- Manual eligibility checks

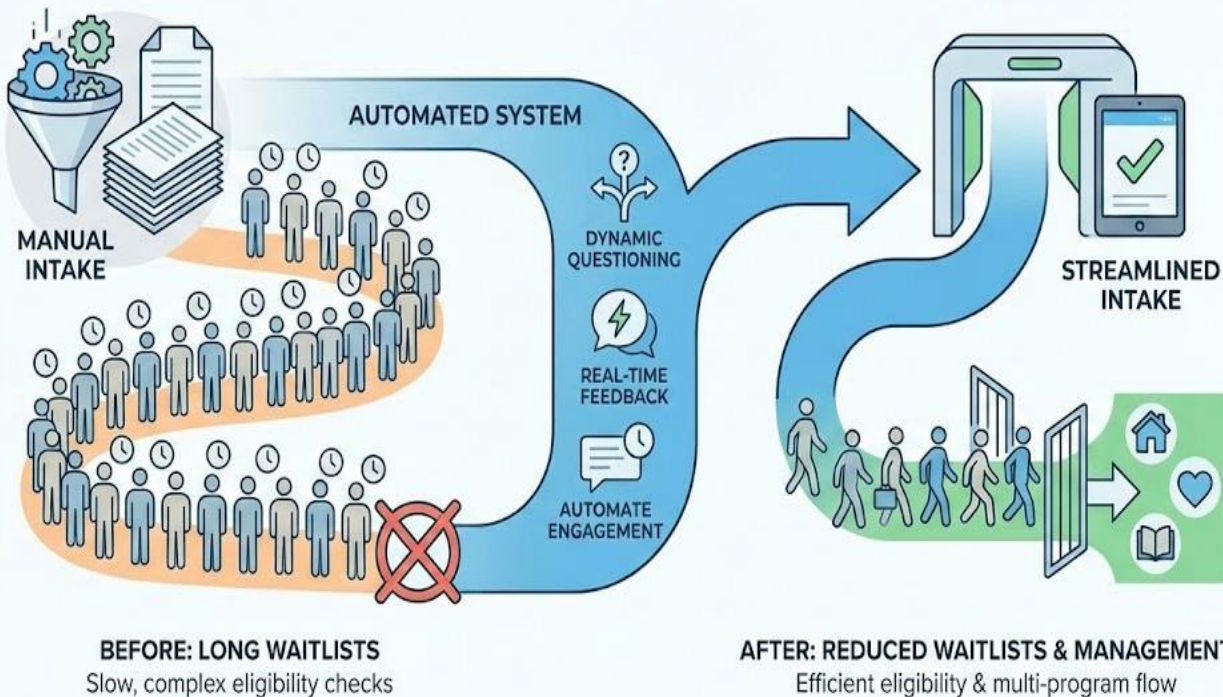
Client

- Disconnected intake across programs
- Repetitive, overlapping forms
- Complicated and unclear questions
- Long wait times for support



NEW MODEL

AUTOMATED INTAKE & REDUCE WAITLISTS

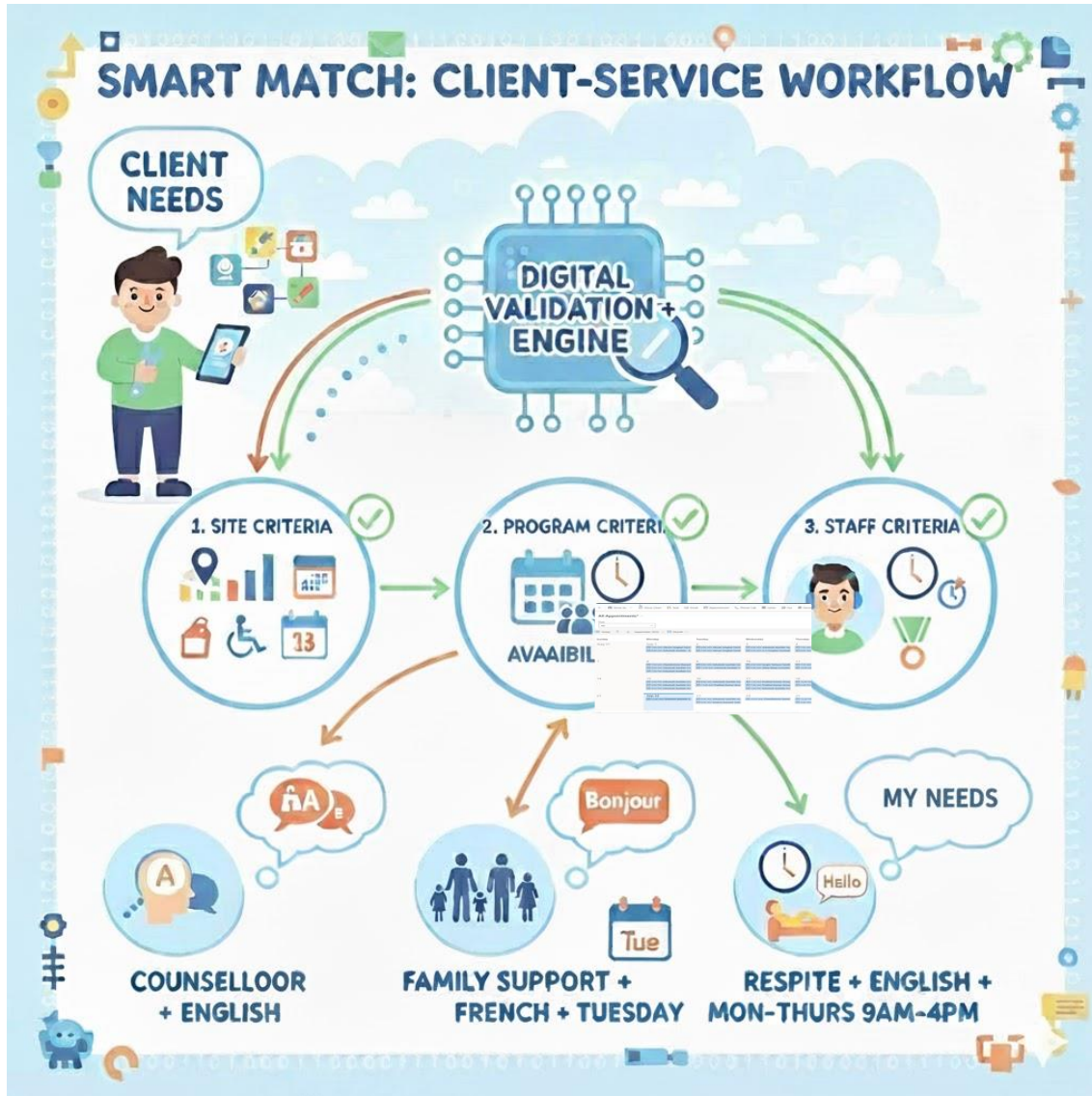


Staff

- Automated intake and e-signatures
- Eliminate data entry or validation
- Auto-booking with intake/program teams
- Real-time eligibility review and prioritization

Client

- Streamlined access/service navigation
- Single, streamlined intake across programs
- Simple, tailored forms
- Faster access to services
- Instant, responsive feedback



Automated Navigation

- ✓ Automated, Outlook-integrated scheduling
- ✓ ***NEW - Smart client-staff matching**
 - ✓ Automatically connect clients needs VS programs, proficiencies, availability
- ✓ Easy appointment management and updates
- ✓ Multi-profile staff/programs calendars with scheduling logic
- ✓ Minimal manual follow-up
- ✓ Simplified, person-centered client experience
- ✓ Automated Waitlist management

Client Engagement

Funding Administration + Fee for Services

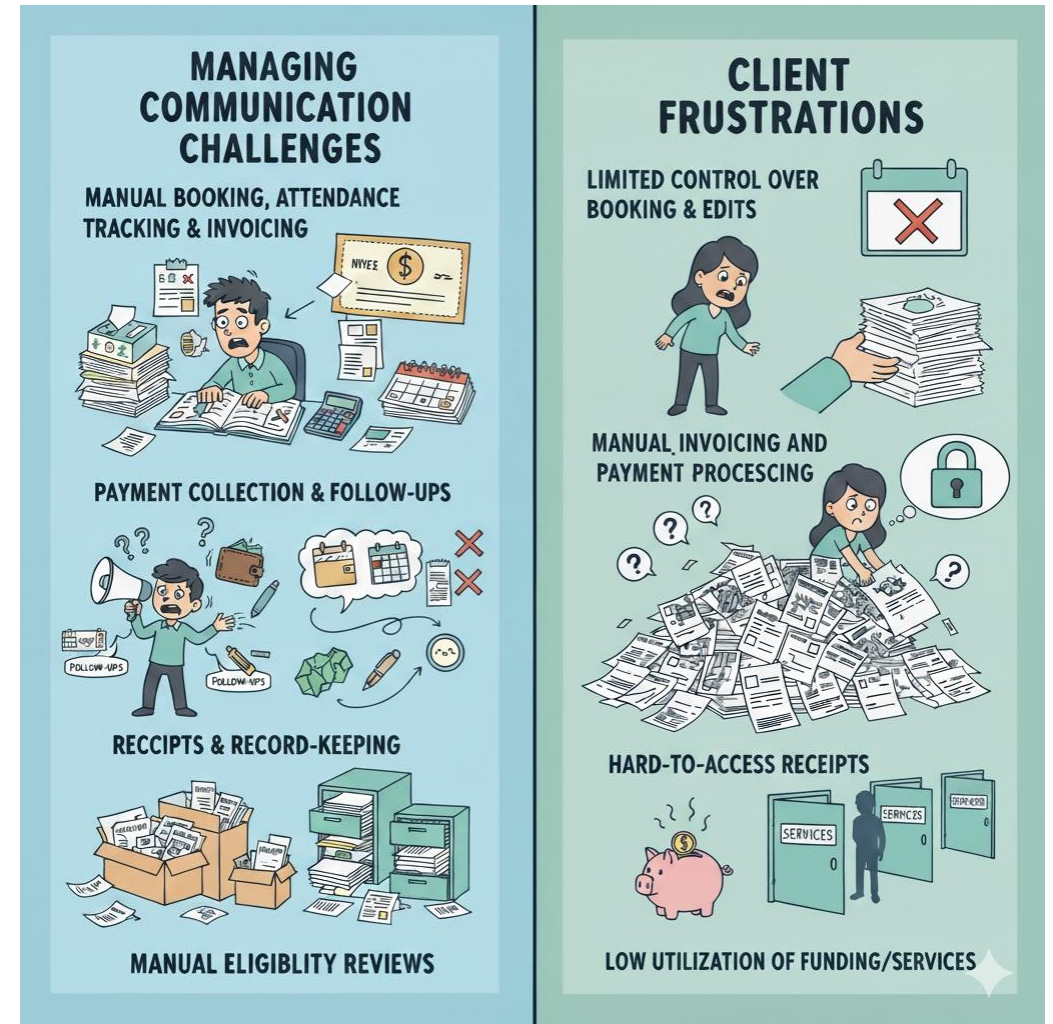
TRADITIONAL FEES

Staff

- Manual booking, attendance tracking, and invoicing
- Complex billing and payment processes
 - Multiple subsidized funding model
- Payment collection and follow-ups
- Receipts and record-keeping

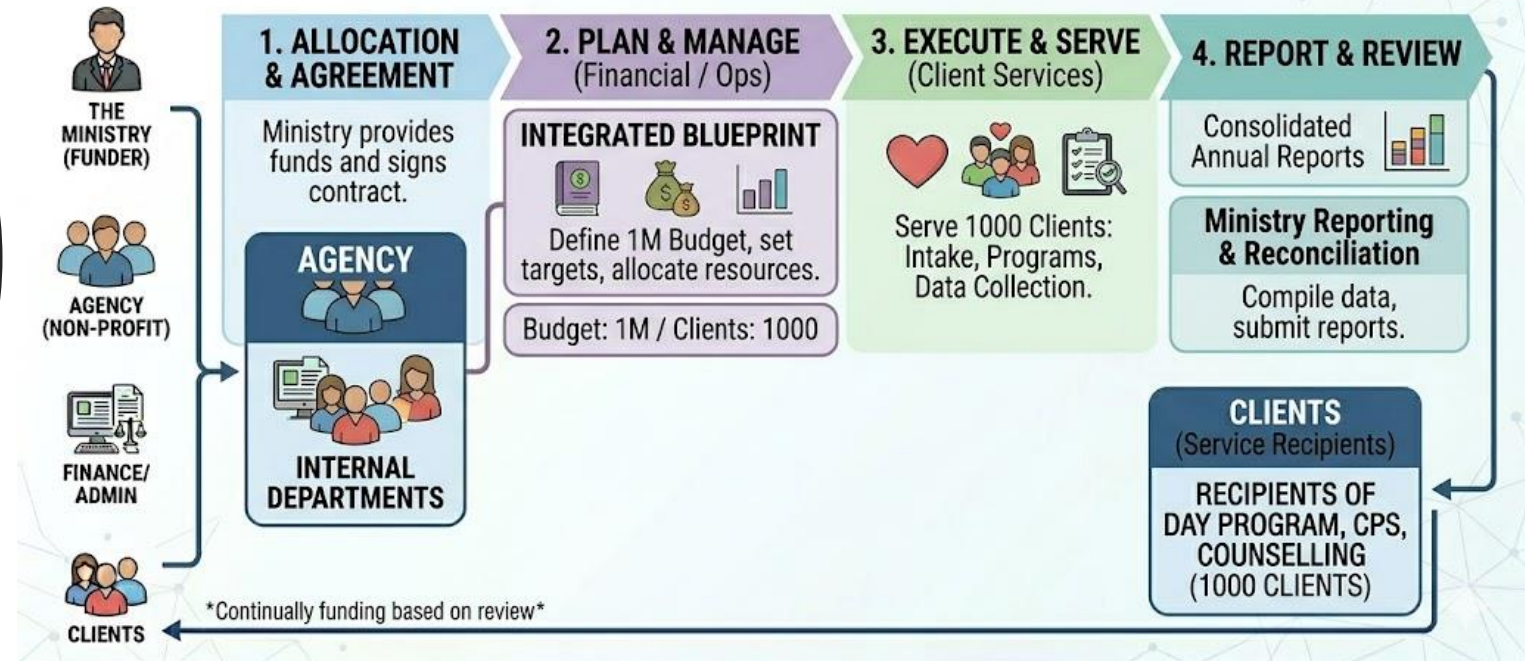
Client

- Limited control over booking and edits
- Manual, cumbersome payment and invoicing reconciliation
- Hard-to-access receipts
- Low utilization of funding/services



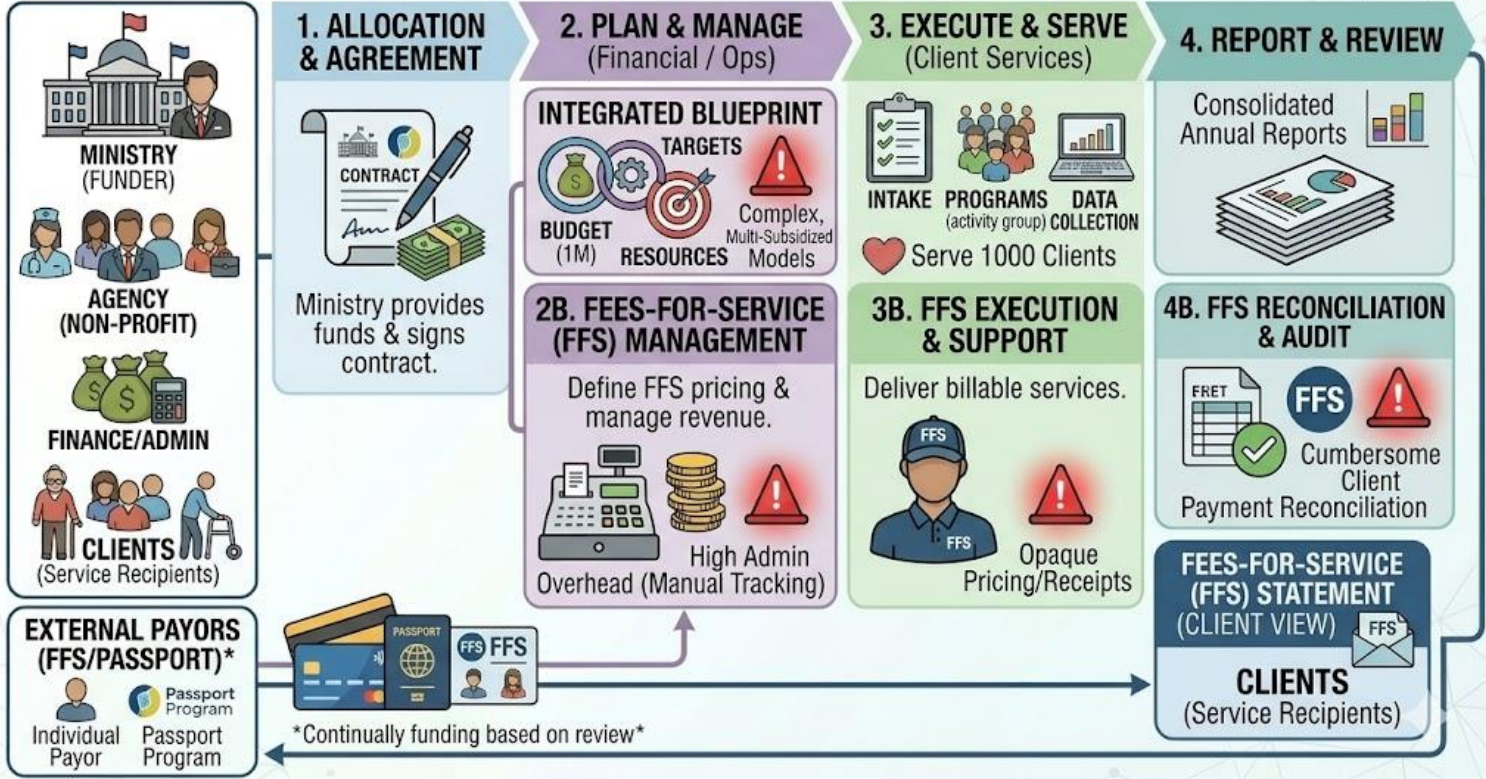
Traditional Model Fully Funding

SIMPLIFIED NON-PROFIT FUNDING & SERVICE MODEL



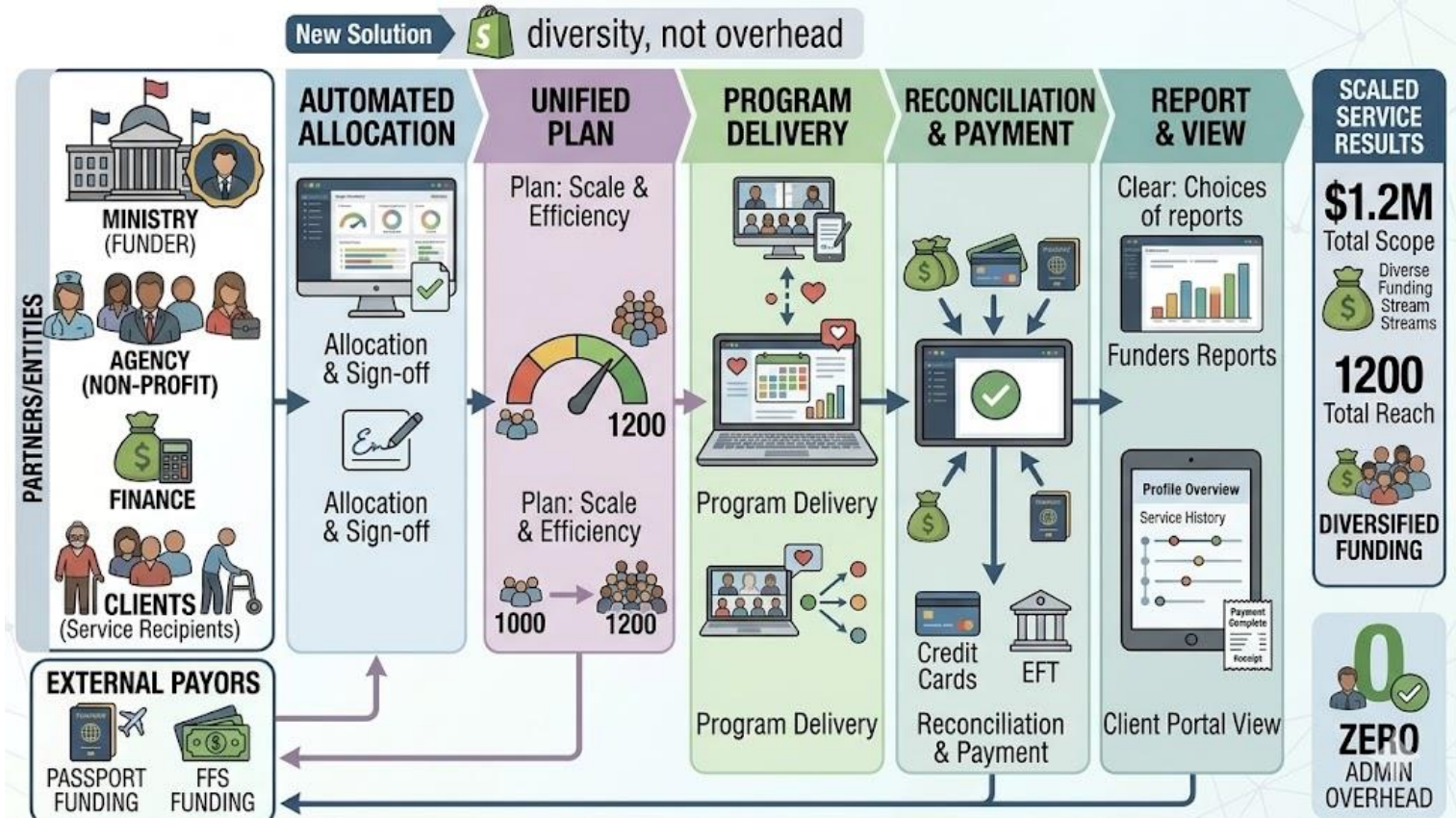
**Growing
Funding + Fee
for Services**

INTEGRATED NON-PROFIT FUNDING & SERVICE MODEL (WITH FFS BOTTLE-NECKS)



**Universal Model
- Funded + Fee
For Services**

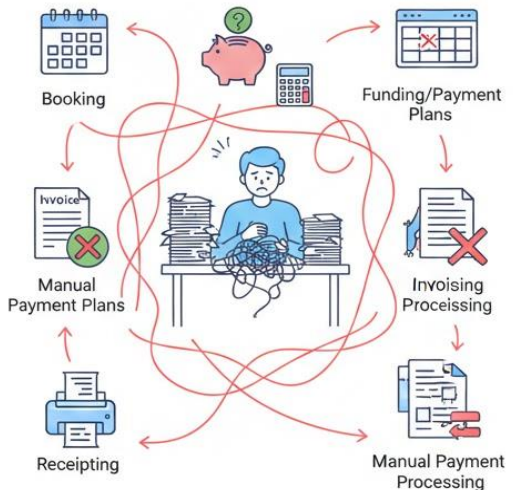
MODERN INTEGRATED FUNDING & SERVICE OPTIMIZATION PLATFORM



NEW MODEL

Automated Fee-for-Service & Funding: Inspired by Shopify

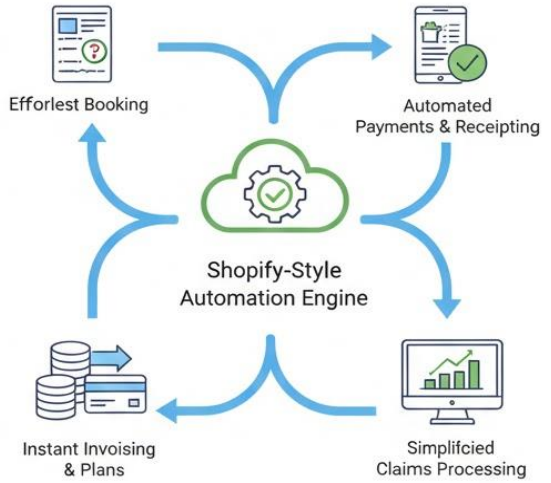
BEFORE: Manual & Disconnected



Slow, error-prone, high-admin cost

Result: Grow Revenue & Funding

AFTER: Automated & Integrated



Increased Revenue, Better Funding Utilization, Zero Manual Finance

Result: Eliminate Manual Finance

Staff

- Fully automated administrative processes
- Auto-generated invoices and payments
- Automated payment follow-ups and receipting
- Automating multiple payment streams
- Client-managed service booking

Client

- Self-service catalog and navigation
- Modern, e-commerce-style experience
- Streamlined payments and receipts
- Increased utilization of funding/services

Client Engagement

Client and Staff Interaction

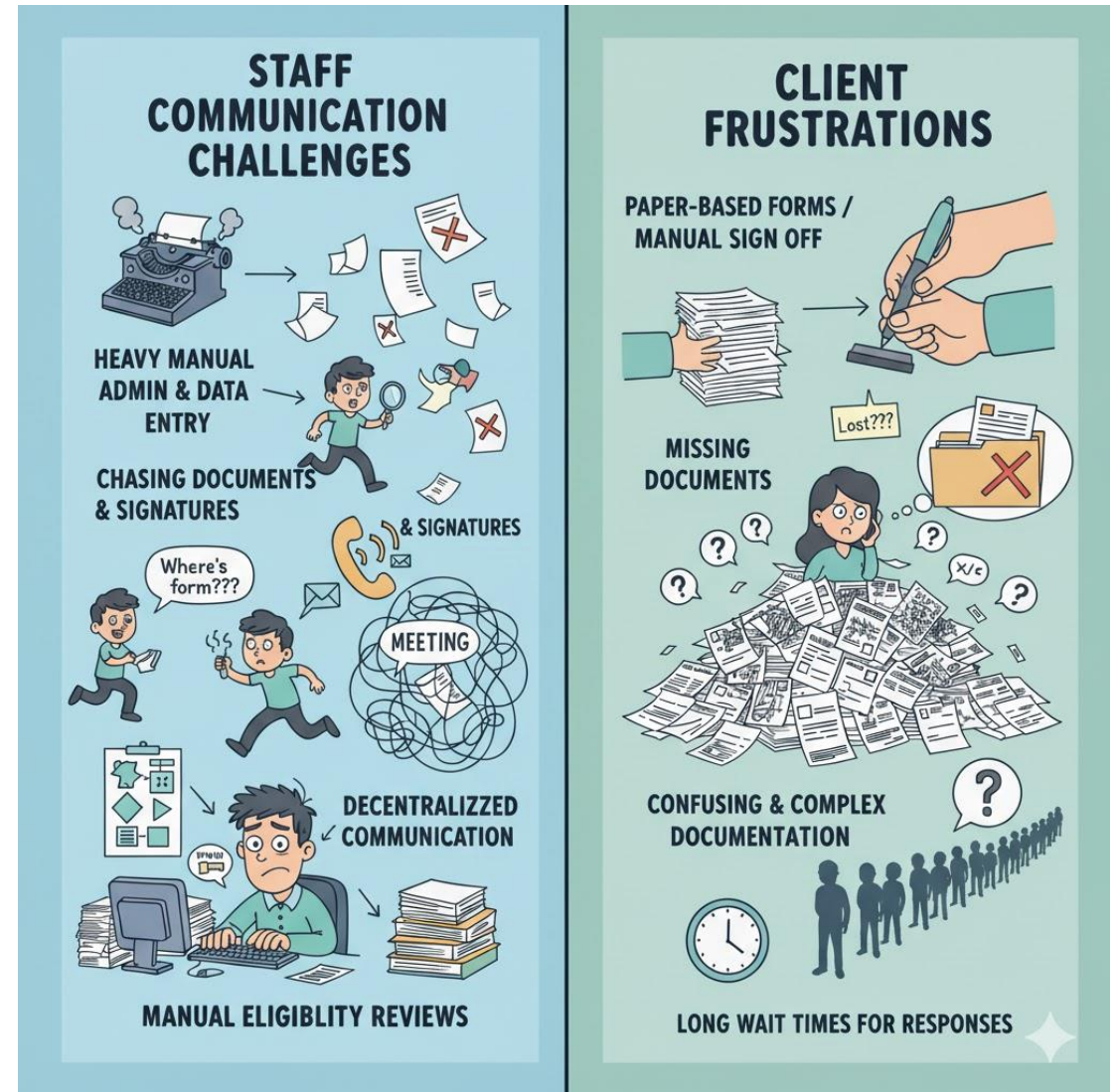
TRADITIONAL ENGAGEMENT

Staff

- Heavy manual admin and data entry
- Time spent chasing documents and signatures
- Decentralized communication (email, calls, meetings)
- Manual eligibility reviews

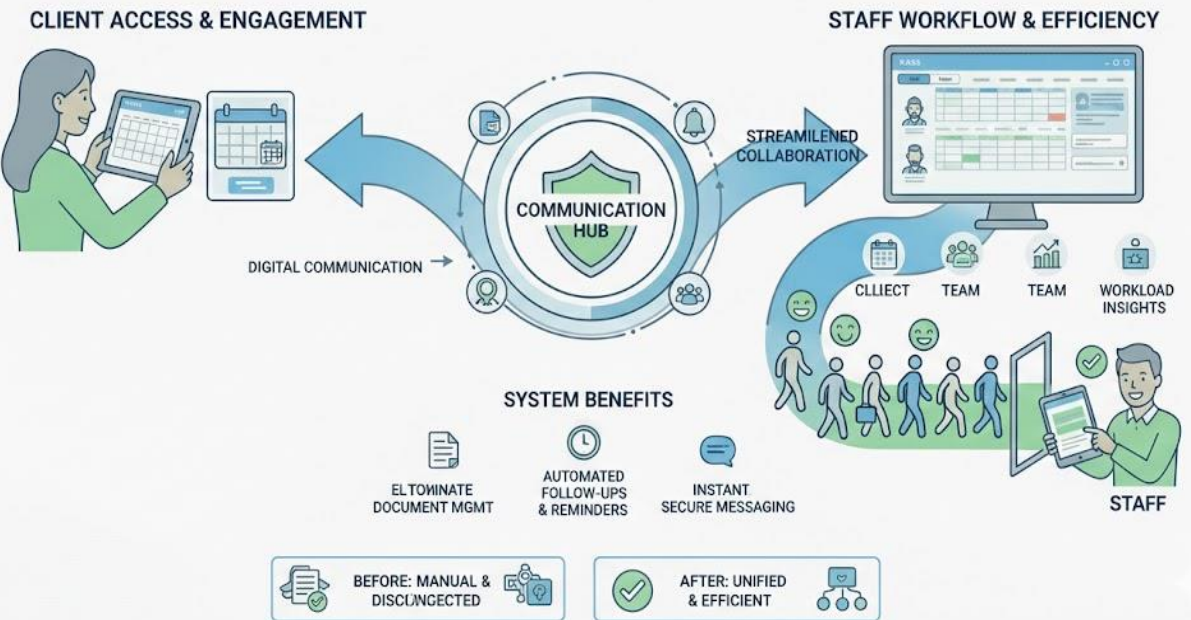
Client

- Paper-based forms or manual sign off
- Missing documents and information
- Confusing and complex documentation
- Limited control and visibility of programs
- Long wait times for responses



NEW MODEL

SECURE COMMUNICATION HUB & COLLABORATION PORTAL



Staff

- Automated reminders and follow-ups
- Centralized communication and document management
- Fully automated document handling (send, receive, store)
- Real-time client notifications
- Improved compliance through centralized records

Client

- Simple, digital self-service experience
- Seamless communication with agencies
- Automatic updates and reminders

Client Connect

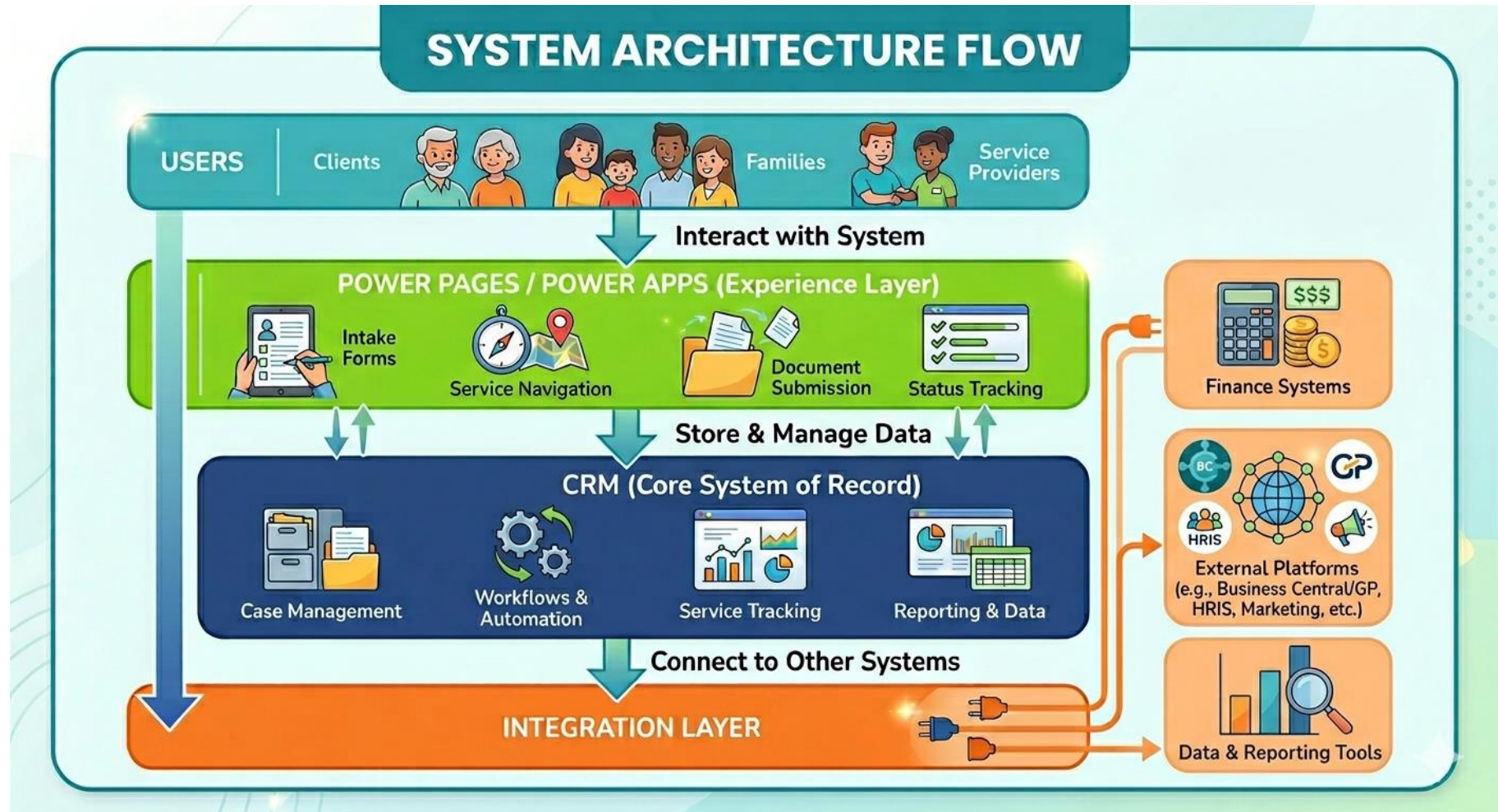
Pilot Project Demo

Person-Centered Service Model

How you can participate

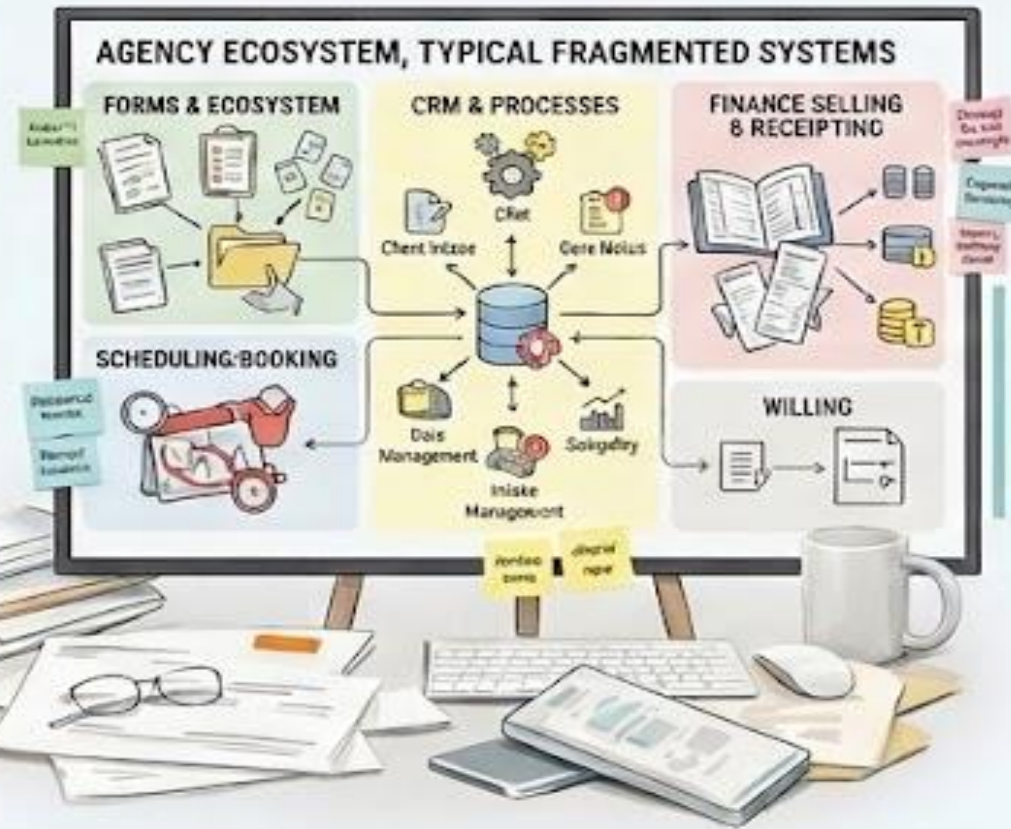
Build on what you have

How it can work with your CRM (If required)



Process Fusion: Redefining Social Service Delivery – Pilot Success

The Legacy: A Fragmented System



Modernize Your Agency

Apply for the Tech
for Change Grant:
[QR CODE]



Scan to Apply

What You Get:

-  1. Software Access
-  2. Expert Support
-  3. Consulting & Assessment
-  4. Technology Roadmap

The Future: A Unified Client Engagement Ecosystem



Why Our Pilot Succeeds: Minimal Risk, Shared Value

- Zero Capital Cost - takenness of therrremonerment provides
- Sustainability - Intevitaility, security, perttainability and renoorbinal confection
- Integration

Take Action

Join Our Pilot: Free Compatibility Assessment
Request an assessment: Scan the QR Code

A risk-adverse adoption

Reduced risk and clear accountability

- ⦿ We take on the upfront risk of customization and onboarding.
No immediate capital costs for setup
- ⦿ Not promising the world VS clearly defined results

A partnership model that aligns with your success

- ⦿ Our cost model is aligned to your funding/fee for services model

Example:

- Fee for services = % of fee or fixed rate
- Ministry Funded - # of clients



Will joining the Pilot be right for you:

Compatibility Review – Part A

Strategic & Ecosystem Fit (Low Time Commitment)

Estimated time: 1 hour call discussion + minimal prep

Will joining the Pilot be right for you:

Compatibility Review – Part B

Operational & Requirements Review (Time Dependent on Scope)

Only if Part A indicates strong alignment do we move into Part B.

Estimated time: Is flexible and tailored to the scope and complexity of what the shared services system would need to achieve. Collaboration to define the level of engagement that fits your current capacity and priorities.



Will joining the Pilot be right for you:

Phase 1: Discovery - Part A and B

At the end of the feasibility process, we will have clarity on:

1. Does the system meet your needs?
2. Are there any risks or limitations?
3. Would the utilization model create a true win/win for both parties?

Phase 2: Customization and Tailoring

- **PFI Investment:** Onboarding and Configuration
- **Agency Investment:** **Just your initial time**
- **Transition Plan :** TBD

Person-Centered Service Model

Q & A