

Pilot Case Study

Inclusive Hiring: Disability Adjudicators at Sun Life

About the ILEO Initiative

The Inclusive Local Economic Opportunity (ILEO) Initiative brings together the private, public, and community sectors to find innovative ways to reduce gaps in economic prosperity at the neighbourhood level. ILEO is convened by United Way Greater Toronto and BMO.

To read additional case studies from ILEO Charter Signatories, visit the [ILEO Resource Hub](#)

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This ILEO Good Jobs Pilot Case Study is aligned with the following [ILEO Corporate Charter](#) Action Area:

- **ILEO Corporate Charter – Action Area #2:** Inclusive hiring and workforce policies that prioritize hiring from structurally disadvantaged communities and recognize barriers to employment.

See our [how-to guide](#) to learn how to implement the ILEO Good Jobs model in your organization.

Acknowledgements

United Way Greater Toronto acknowledges the valuable contributions from Sun Life and ACCES Employment for the creation of this case study.

Illustration by Storyset

SUMMARY

- In October 2020, ILEO partners came together to create the ILEO Good Jobs pilot to address a long-standing challenge: job seekers with skills and training are unsuccessful in finding work, while at the same time employers experience recruitment and retention challenges for certain in-demand roles.
- As the first employer in ILEO Good Jobs, Sun Life worked closely with United Way Greater Toronto and ACCES Employment to co-develop a program pathway for residents of the Greater Golden Mile into full-time Sun Life Disability Adjudicator positions with competitive pay, benefits, and advancement opportunities.
- As a prime example of multi-sector collaboration, ACCES Employment and Sun Life co-designed and co-delivered a four-week bespoke training program for 17 candidates, with 7 candidates eventually being hired as full-time Disability Adjudicators in March 2021.
- As of August 2022, five of the original seven hires have remained at Sun Life as disability adjudicators, representing a retention rate of 71%, with some showing potential to progress into the Disability Case Manager role.
- Key lessons for future iterations include understanding the importance of integrating mentorship supports at all stages of the process, taking a strength-based approach to designing the training curriculum, involving both the employer and community partners throughout the process, and integrating content on business culture and etiquette in pre-employment training.

BACKGROUND

[Sun Life](#)'s purpose is to help Canadians achieve lifetime financial security and live healthier lives. To do this, they offer a broad range of protection and wealth products and services to individuals, businesses and institutions including insurance, investments, financial advice, and asset management. In 2020, Sun Life came together with 17 other major Canadian corporations to sign the ILEO Corporate Charter as a commitment to positively influence community economies by taking action through one or more of five action areas. As the first employer in the ILEO Good Jobs pilot, Sun Life supported the **Inclusive hiring and workforce policies** action area (see Box 1).

Also participating in the ILEO Initiative was [ACCES Employment](#), a leading employment services provider with a vision of a fully inclusive labour force that reflects the diversity, skills, and experience of Canada's population. ACCES connects job seekers from diverse backgrounds with leading employers serving more than 40,000 job seekers annually through seven locations across the Greater Toronto Area and online services that reach job seekers across Canada and around the world. Working closely with Sun Life, ACCES Employment played a key role in the development and implementation of the first iteration of the pilot.

As the co-convenor of the ILEO Initiative, [United Way Greater Toronto](#) co-designed and stewarded the pilot, co-developed a framework and guide with [IBM Canada](#) (See Spotlight Box 2) and coordinated the private and community sector efforts. UWGT is the largest non-government funder of community services in the GTA and reinforces a crucial community safety net to support people living in poverty. United Way's network of agencies and initiatives in neighbourhoods across Peel, Toronto and York Region works to ensure that everyone has access to the programs and services they need to thrive. Mobilizing community support, United Way's work is rooted in ground-breaking research, strategic leadership, local advocacy, and cross-sectoral partnerships committed to building a more equitable region and lasting solutions to the GTA's greatest challenges.

Spotlight Box 1. Inclusive Hiring and Workforce Policies and the ILEO Corporate Charter

One of the action areas for signatories of the **ILEO Corporate Charter**, Inclusive hiring and workforce policies aim to attract and retain employees from communities that face barriers to employment, and/or to increase workplace diversity, inclusion, and security for existing employees, particularly those with non-standard, insecure working arrangements or a sense of exclusion from the social and cultural aspects of the organization. For people from groups that are traditionally excluded, actions to increase workforce inclusion and security result in more economic opportunities, and greater employment stability and continuity. This offers them increased control over their lives and ability to plan and manage their personal and family finances.

THE CHALLENGE

Many people living in under-resourced communities in the Toronto region such as the Greater Golden Mile continued to **face many barriers to full-time stable employment**. Once a thriving hub for large-scale manufacturing in the 1950s, the Golden Mile experienced an economic decline as manufacturing industries began to move away from the neighbourhood starting in the 1970s. Today, the Golden Mile is home to many diverse communities including immigrant and racialized communities that continue to experience barriers to economic prosperity. This is evidenced by data showing that the neighbourhoods¹ comprising the Greater Golden Mile continue to experience below-average income and employment rates compared to the rest of the city – a key indication that opportunity is not reaching all residents. Local community organizations also attest that many job seekers in the community struggle to find meaningful and well-paid full-time employment despite their diverse set of skills and experiences.

Recognizing these complex barriers to employment, ILEO partners created a new approach that prioritized hiring traditionally underserved groups in the community while also leveraging their strengths. As the first employer, Sun Life used this approach to address recruitment and retention challenges for in-demand positions in their claims department making it mutually beneficial. To be successful, it was important to work closely with local organizations with in-depth knowledge and connection to the Golden Mile community.

WHAT ILEO PARTNERS DID



¹ These neighbourhood improvement areas include Victoria Village, Ionview, Kennedy Park, Flemingdon Park and Eglinton East.

Design the Pilot Model

In October 2020, ILEO partners² came together to co-design the ILEO Good Jobs pilot equipped with the principles of inclusive economic opportunities identified by the ILEO Leadership Table. ILEO partners set out to create a model that would be scalable and involve employers in designing and delivering bespoke training for specific roles, all while leveraging the networks and expertise of local community agencies. IBM Canada played a crucial role in the design phase of the pilot model (see Spotlight Box 2) by leveraging its expertise in developing previous skills and training programs for social impact (see [IBM's case study on the P-TECH model with Six Nations Polytechnic](#))

Spotlight Box 2. Designing a New and Scalable Model with IBM Canada

The IBM Canada Service Corps dedicated a four-person team to work with United Way Greater Toronto to develop a scalable model for the ILEO Good Jobs pilot that would be aligned with key principles identified by the ILEO Leadership Table. Inspired by the West Philadelphia Skills Initiative, IBM helped create a model for the pilot with the following goals:

- Link training as closely as possible to in-demand jobs at specific employers, not just promising industries
- Work closely with employers to identify roles with recruitment and retention challenges to ensure they benefit from their participation as much as jobseekers
- Involve employers as much as possible in training delivery specific to the role
- Make sure post-hire supports were available to both employers and employees

Under this new model, employers and agencies would work together to customize training, screen applicants, and support their development through an extensive and targeted array of interactions. Key minimum sustainability criteria for “Good Jobs” were also identified such as having a living wage, growth potential, full-time hours, and benefits (see full criteria below)

ILEO Good Jobs Criteria Rubric



² ILEO partners involved in developing ILEO Good Jobs include Sun Life, ACCES Employment, IBM Canada, and United Way Greater Toronto.

Identify the Role and Profile

By November 2020, Sun Life had identified a need for 6 Disability Adjudicators (see Spotlight Box 3) in their disability claims department. In addition to experiencing recruitment and retention issues, 3 features made the role ideal for the pilot:

1. It had relatively low barriers to entry meaning that it could cater to Greater Golden Mile residents with strong transferrable skills even if they lacked Canadian experience.
2. It could leverage healthcare knowledge and experience, which many newcomers in the neighbourhood had, even if acquired outside Canada.
3. It included a clear pathway for professional growth into the Disability Case Manager position while also meeting the pilot's minimum criteria for ILEO Good Jobs.

Spotlight Box 3. What is a Disability Adjudicator?

Disability Adjudicators work as members of a team. They assess and manage disability insurance claims to resolution. Key responsibilities include assessing new short-term disability (STD) claims, determining if plan members are entitled to receive benefit payments and developing appropriate action plans for each claim. Disability Adjudicators communicate and engage with plan members, plan sponsors, physicians, and other internal and external stakeholders on a regular basis.

For the first iteration of the pilot, ILEO partners worked together to identify an ideal candidate profile based on the strengths of the community. The ideal candidate profile was identified as Newcomers to Canada with a healthcare professional background who did not wish to become certified to work in Canada and were looking for new career opportunities.

Co-Create the Program for the Role

With a clear role and profile defined, ILEO partners leveraged ACCES's Healthcare Connections curriculum, IBM's SkillsBuild.org platform and Sun Life's own training program to create a bespoke training program specific to the disability adjudicator role by January. Taking a strengths-based approach, the training curriculum was designed specifically for newcomers with previous healthcare experience - many of whom were internationally trained but were not licensed to practice in Canada.

Recruit and Deliver the Training Program

With the program design completed, United Way worked with a network of community partners³ and the City of Toronto's Employment and Social Services to identify, refer and recruit job seekers in the Greater Golden Mile that fit the ideal candidate profile. This included several newcomers that had previously worked as doctors, nurses, speech therapists, occupational therapists, PSWs or physiotherapists. Through a highly collaborative 4-week recruitment process, 34 individuals were referred, and 17 individuals were selected to participate in the pilot by mid-January 2021.

Over four intensive weeks, ACCES Employment and Sun Life co-delivered the bespoke training program to the 17 candidates, allowing for extended and multiple interactions between candidates and Sun Life's hiring managers. Training took place virtually every weekday with two main parts:

³ YWCA Toronto, WoodGreen Community Services, Catholic Crosscultural Services, the Centre for Internationally Educated Nurses, and The Neighbourhood Organization (TNO) provided help to refer individuals to the training program.

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- **2-week bridging program by ACCES:** Candidates received training aimed at supporting internationally educated healthcare professionals seeking to translate their experience to secure non-licensed employment in the broader healthcare sector. This program also included
 - Supports on how to use computer platforms and communicate effectively through technology
 - A panel overview by Sun Life
 - General employability skills training such as interview coaching, resume workshops, and personal branding.
 - **2-week pre-employment training by Sun Life:** Candidates received daily training specific to the Disability Adjudicator role including:
 - An Introduction to Sun Life, the insurance sector, and its divisions
 - Fundamentals of disability management including processes and technical terms
 - Privacy and communications including understanding client relationships
 - Overview of the disability adjudicator and related positions
 - General employability training such as group resume clinics, mock interviews, speed mentoring and other supports

Hire and Place candidates

Following 4 weeks of training, Sun Life interviewed all 17 candidates in early March and hired seven Disability Adjudicators into one-year contracts. Sun Life initially hired one more Disability Adjudicator than its original hiring target due to the high calibre of candidates. During the one-year contract period, two of the hires were unable to continue in their roles due to unforeseen circumstances, and in March 2022, Sun Life hired the remaining five participants as full-time Disability Adjudicators.

Offer Post-hire supports

After the hiring, placement and role-specific training program, residents received ongoing supports for 12 months from Sun Life and ACCES Employment. Sun Life began with dedicated support for 3 months following classroom training where each pilot participant was assigned a mentor who provided daily peer review and assistance as needed. Following this, Sun Life ensured that participants were provided with daily check-ins and mentoring from their immediate manager as well as with the flexibility to allow them to achieve a positive work-life balance. Additional wraparound supports such as home office furniture, technology, and other community supports were coordinated through United Way Greater Toronto and a network of community agencies.

RESULTS AND COMMUNITY IMPACT

This first iteration of the pilot had the following immediate effects:

- 17 candidates from the GGM received unique employability supports in the form of bespoke training, workshops and mentoring co-designed and co-delivered by ACCES Employment and Sun Life.
 - Candidates received a total of 150 hours of tailored training over 4 weeks exposing them to the fundamentals of working professionally in the insurance industry in Canada.
- Seven residents began employment with Sun Life as disability adjudicators, and after one year, five were in stable full-time positions with competitive pay, comprehensive benefits, and opportunities for advancement, thus increasing their economic well-being.

Beyond hiring local jobseekers into full-time positions, the pilot had ripple effects in terms of its **impact on the local community and contributing partners** including:

- A. Increasing employability skills among local job seekers** through tailored training and coaching that leveraged their existing strengths and skills:

"My biggest learning experience from this is the fact that this program made it possible for me to identify skills from my previous work experience. Skills that helped me prepare for the job and now I am exposed to a new career. I have met a lot of good and interesting people and have learnt a lot from them."

Robby Alappat, program graduate and Disability Adjudicator at Sun Life

- B. Creating a blueprint for a made-in-the-GTA replicable model for inclusive hiring for in-demand jobs** through the successful adaptation of the West Philadelphia Skills Initiative. Please see a short [how-to guide](#) about how to implement the model in five easy steps.

One of the biggest learnings was that this model can now be used with other employers in the GGM neighbourhood but it can also be shared with other cities to create lasting inclusive economic prosperity for neighbourhoods across the country."

Claude Guay, Global Managing Partner, Ventures, IBM Consulting

- C. Increasing economic opportunities for underrepresented groups** through a model that purposefully leveraged their strengths and skills to place them into good jobs.

"The biggest hindrance to newcomers like me is uncertainty—but this is a complete, 360 program. The most important thing we need is support, and ACCES offers that. I encourage other newcomers to take advantage of these opportunities!"

Habeebah Patel, program graduate and Disability Adjudicator at Sun Life

"Our Good Jobs pilot is helping make a difference in people's lives and drive meaningful impact in the community. We've hired people with health care backgrounds, bringing relevant skills and experience into our disability management business"

Jeff James, Vice-President, Group Disability, Sun Life.

LESSONS LEARNED

As ILEO partners consider replicating this model, Sun Life, ACCES Employment and United Way Greater Toronto identified the following key lessons:

- **Integrating tailored mentoring supports throughout the process is key to ensuring employee satisfaction and retention:** Sun Life's decision to assign a mentor to each pilot participant for three months after classroom instruction allowed participants to gain crucial insights into the role, receive daily peer review and ask for assistance when needed. However, once candidates began working, it became difficult to get a clear picture of the challenges and successes they were experiencing. Given the importance of mentoring new hires, future iterations should prioritize both formal and informal post-hire support for candidates from community partners and employers. For instance, this could include structured check-ins with external advisors/coaches over the first year in addition to mentoring supports internally.
- **Take a strengths-based approach when identifying the role and designing the training curriculum:** ILEO partners worked together to identify an ideal candidate profile based on the requirements of the role and the strengths of the community. They then designed a training curriculum for a role that would allow local candidates to leverage their pre-existing knowledge and expertise. In the context of the Golden Mile, this meant the training curriculum for the disability adjudicators was designed specifically for newcomers with previous healthcare experience and knowledge.
- **Involve the employer and community partners throughout the process of customizing training, screening applicants, and supporting their development through an extensive array of interactions:** Sun Life's involvement with community partners throughout the entire process allowed for multiple extended and mutually beneficial interactions with candidates. This allowed them to learn more about the role, the company and the skills needed to succeed at different points in the process. ILEO partners looking to replicate this model should consider clearly defining suitability criteria including language proficiency for the role. For instance, key success factors during the recruitment and hiring process for disability adjudicators were communication skills and English language proficiency. To further refine the pool of candidates, a clear definition of the English proficiency requirements and an outline of the specific communication skills needed for the role can be included in the suitability criteria prior to and during recruitment and hiring.
- **Recognize the importance of business culture and etiquette in training:** Some participants in the pilot experienced challenges adapting to their new workplace. To ensure that expectations are clear, in future iterations, companies and community partners should integrate more employer-informed content on business culture and etiquette into the curriculum. This type of training would likely have the most impact in a group setting as part of general pre-employment training before candidates begin employment or in post-hiring training before working with their assigned managers.
- **Ensure early alignment and clarity around retention and goals:** Partners identified the importance of engaging candidates early on about their long-term professional goals including their desire to return to their previous field. To promote retention of candidates in the long-term, key professional goals for candidates could be identified early on to tailor training needs and length accordingly.

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THE ORGANIZATIONS AND CONTACT

Sun Life is a leading international financial services organization providing a diverse range of asset management, wealth, insurance, and health solutions to individual and institutional clients. Please contact Diane Lacopo at diane.lacopo@sunlife.com to learn more about Sun Life's participation in ILEO Good Jobs.

ACCES Employment is a leading employment services provider with a vision of a fully inclusive labour force that reflects the diversity, skills, and experience of Canada's population. ACCES connects job seekers from diverse backgrounds with leading employers serving more than 40,000 job seekers annually through seven locations across the Greater Toronto Area and online services that reach job seekers across Canada and around the world. Please contact Cameron Moser at cmoser@accesemployment.ca to learn more about ACCES Employment's participation in ILEO Good Jobs.

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To learn more about the ILEO Good Jobs pilot, please contact Fabio Crespín at fcrespin@uwgt.org. For any questions regarding this case study or the accompanying [how-to guide](#), please contact Federico Vargas at fvargas@uwgt.org