The Future is Now
Strengthening High-Quality, Inclusive and Innovative Hybrid Service Delivery

Cansu Ekmekcioglu, Renee Black, Marco Campana
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EXECUTIVE SUMMARY

Over the last two years, a significant amount of learning and innovation has occurred in Canada’s settlement sector. The pandemic has amplified the role settlement organizations play in enabling newcomers to actively participate in all areas of social, economic, and political life. The sector has increasingly learned, developed, and integrated technologies into service delivery. Moreover, there is an increased recognition of the complementary role newcomers and grassroots groups play in creating novel solutions that contribute to community resilience.

Yet critical gaps remain in moving towards a deliberate and sector-wide hybrid service strategy. These include lack of strategic planning, targeted investment, consistent attention, and dedicated resources to advance innovation and digital transformation. These gaps are further exacerbated by restrictive funding models that often discourage innovation.

In the last two years, a series of key reports by the Settlement Sector and Technology Task Group, Affiliation of Multicultural Societies and Service Agencies (AMSSA), Immigration, Refugees and Citizenship Canada (IRCC), PeaceGeeks and the Association of Canadian Studies (see Appendix A), have helped to reimagine what a revitalized and digitally-enabled settlement model could look like. These reports make it clear that addressing these issues requires putting newcomers at the centre of service delivery and adopting the right strategy, skills, culture, and technology at pace and at scale.

“Addressing these issues requires putting newcomers at the centre of service delivery and adopting the right strategy, skills, culture, and technology at pace and at scale.”

It is not about making incremental improvements that make existing processes marginally better. Instead, it demands that organizations, together with funders and other stakeholders, step into unfamiliar and sometimes uncomfortable conversations, and completely reimagine how services are designed and delivered. To help the sector get there, our goal is to present sector stakeholders with the most salient considerations for hybrid service delivery.

The sector is now at an inflection point. Canada is considered a global leader today in welcoming and including newcomers into Canadian society. Canada now has an opportunity to also become a global leader in leveraging technology and innovation to streamline the newcomer settlement experience and strengthen inclusion. Without the right investment, this work risks failing to deliver the efficiencies, improved service delivery, and experiences that are possible.
Our consolidated recommendations set an ambitious vision where every newcomer is supported throughout their settlement journey with equitable, inclusive, and high-quality hybrid service delivery. The roadmap will help key settlement sector stakeholders take targeted actions to shape the future of the sector in Canada. It will further outline the guidance and resources needed to move this strategy forward.

Getting there requires a lot of work. To effectively achieve its mandate, the newly formed National Steering Committee on Technology requires dedicated, flexible and sustainable financial support in the form of a permanent Secretariat that can help the sector to advocate for and advance key priorities.

This report begins by outlining key gaps and learnings from the reports listed in Appendix A. Aligning with IRCC’s strategic vision, we then provide in-depth explorations of key findings in four major areas: Strengthening the Hybrid Service Environment, Enabling Innovation, Mobilizing Knowledge, and Ensuring High-Quality and Inclusive Settlement Services. We conclude by summarizing the main recommendations into what can become the foundation for a sector-wide strategy and action plan.

While each of the reports consulted focuses on different perspectives and priorities, the recommendations ultimately complement one another and collectively pave the way to a comprehensive sector-wide roadmap. This complementarity signals a shared readiness for and commitment to digital transformation across the sector. What is urgent now is to build on this momentum and take concrete action towards making this strategy a reality as the sector leads up to IRCC’s 2024 Settlement and Resettlement Assistance Programs Call for Proposals. The time to invest strategically and to catalyze this change is now.

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Key Recommendations - Overview Table
NATIONAL STEERING COMMITTEE ON TECHNOLOGY

Following two years of accelerated learning and technology adoption resulting from COVID-19 pandemic and sector-specific reports on technology transformation, the settlement sector is now at a critical inflection point. Canada is already considered a global leader today in welcoming and including newcomers into Canadian society. It now has an opportunity to also become a global leader in harnessing technology and innovation to streamline newcomer settlement journeys and strengthen their active involvement in Canada’s social, political, and economic life.

This report sets out an ambitious vision of a technology enabled and innovative settlement sector, where every newcomer is supported throughout their settlement journey with equitable, inclusive, and high-quality hybrid services.

For the sector to achieve this goal, four high-level priorities must be met:

1. Strengthening the Hybrid Service Environment
2. Enabling Innovation
3. Mobilizing Knowledge
4. Ensuring High-Quality and Inclusive Settlement Services

The report has two sections. Part one contains a high-level overview. It summarizes the vision for each of the four Key Recommendations, subdivides them into related Objectives (15 in total), and then further breaks these down into supporting actions and principles.

Part two is a complementary narrative report, which explores the Key Recommendations, the Objectives and the actions and principles into more detail. We explain what each of these pieces mean, how they are relevant to the settlement sector, and why they are essential components of the strategic plan. Together, they create a roadmap that will help key settlement sector stakeholders take targeted actions to shape the future of the sector in Canada.
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TABLE LEGEND
KEY OBJECTIVE

Strengthening the Hybrid Service Environment

The settlement sector consistently fosters an enabling service environment characterized by a shared vision of digital transformation, and the baseline capacities, infrastructure and culture needed to achieve that vision.

IRCC’S STRATEGIC VISION FOR DIGITAL SERVICES

SPOs continue their digital transformation, while providing tailored in-person services to clients who need additional support.
VISION & STRATEGY

SPOs have a shared commitment to a newcomer-centric and sector-wide strategic vision for digital transformation and pursue sectoral, organizational and project objectives to advance that vision.

1. Develop and sustain a common evidence-based sector-wide strategic vision for digital transformation including by:
   a. Establishing concrete guidelines on digital inclusion and equity
   b. Embedding the strategy in research on Digital and Data Maturity models, as well as Risk Frameworks
   c. Establishing specialized working groups to advance key priority areas
   d. Providing guidance to SPOs and sector on change management
   e. Establishing a monitoring and evaluation plan to assess progress and identify emerging needs
   f. Ensuring that newcomer experiences are centered in service design and delivery processes

2. Build contextualized and continuous digital capacities by:
   a. Investing in low-cost, high-impact and localization approaches
   b. Investing in long-term, ongoing support
   c. Formalizing new digital professional roles and Communities of Practice
   d. Establishing baseline skills, capacities and infrastructure at all levels

3. Acknowledge the role of technology as a service enabler and not just as infrastructure which requires:
   a. Recognizing certain technology costs as a core/ operational/ service delivery expenses
   b. Investing in research on, and testing relevance of, new technologies for service delivery as they emerge
4. **Improve newcomer digital literacy by:**
   a. Defining a spectrum of digital literacy and creating common tools to assess and target both remote and in-person services
   b. Integrating newcomer digital literacy assessment into SPO programs
   c. Ensuring newcomers have access to digital literacy development opportunities, regardless of circumstances and stages of their settlement journey

5. **Strengthen digital literacy of frontline and leadership by:**
   a. Allocating funding to develop targeted training, upskilling and frontline professional development
   b. Creating new sector-specific technology transformation positions and ensuring that all job descriptions accurately reflect changing expectations and skill requirements
   c. Developing funds to identify best practices on cybersecurity, privacy, and digital literacy
   d. Strengthening the Library of Good Practices by expanding resources on SPO and newcomer-facing tools
### DIGITAL INFRASTRUCTURE & INFORMATION TECHNOLOGY

SPOs adopt the right mix of secure and interoperable systems to support effective service delivery

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<td>a. Strengthening client tracking and data management systems, including CRMs, that are interoperable and that comply with existing data standards</td>
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<td>b. Ensuring a mix high-tech and low-tech solutions to better serve newcomers with diverse literacy levels</td>
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<td>c. Promoting interoperability across systems and information technology solutions</td>
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### CULTURE CHANGE

Settlement practitioners are encouraged to continuously innovate through flexible funding models, incentives and skills development

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<th>7. Create incentives for stakeholders to adopt a culture of innovation by:</th>
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<td>a. Embracing openness to learn, test, take risks and experiment at an organizational level</td>
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<td>b. Creating incentives and recognition for and a culture of collaboration at a sector level</td>
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<td>c. Strengthening funding incentives that promote an open and collaborative culture at a funder level</td>
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KEY OBJECTIVE

Enabling Innovation

IRCC’S STRATEGIC VISION FOR DIGITAL SERVICES

The Settlement Program provides a suite of digital settlement services that improve client outcomes and Program effectiveness.

SPOs’ skills, commitment and desire to innovate are supported with a shared innovation mindset, enhanced data skills and use, and continued funding.
### Innovation Mindset

A culture of innovation and ideation is continuously fostered through exposure to new ideas built through a common sector definition of innovation.

### Data Use & Data Skills

Organizations can securely collect, use, share, and analyze to support and strengthen service delivery, evaluate program impact and assess newcomer outcomes.

### 8. Mainstream innovative service design and delivery by:

- a. Articulating the definition and the value of innovation to the settlement sector
- b. Building a shared understanding of and commitment to innovation practices across the sector

### 9. Enhance the quality and diversity of data collection tools for improving programming and service evaluation by:

- a. Identifying data gaps and supporting the sector to develop new evaluation tools and methodologies
- b. Identifying resources needed to collect and integrate anecdotal data into formal feedback protocols
- c. Building and continually improving data sharing guidelines with a focus on promoting interoperability
- d. Setting up a secure, central hub to enable SPO data sharing and sector referrals
- e. Identifying frontline and leadership data skill needs and provide professional development
- f. Defining and supporting professional data roles required for SPOs to harness their client data

### Funding Models

Innovative programs, practices, and services are incentivized, resourced, and implemented consistently.

### 10. Reimagine funding models, requirements and relationships by:

- a. Acknowledging that long-term, flexible funding models with simplified application processes promote innovation
- b. Rethinking the link between funding structures and service outcomes, taking into account that positive service outcomes often require longer term engagement
- c. Acknowledging funding models should embrace openness to learning, testing, risk taking and experimenting at an organizational level, including changes to funding agreements and program design during the funding period
KEY OBJECTIVE

Mobilizing Knowledge

All SPOs are funded, supported, and encouraged to participate in formal and informal information sharing mechanisms to build, share, and replicate sector knowledge.

IRCC’S STRATEGIC VISION FOR DIGITAL SERVICES

The Settlement Program provides a suite of digital settlement services that improve client outcomes and Program effectiveness.
11. Streamline communication and information sharing mechanisms and provide funding to promote collaboration:

**Between IRCC and SPOs by**
- a. Reinforcing feedback loops between IRCC and SPOs on outcome evaluation

**Among SPOs by**
- b. Creating a central hub for sharing learning of successful approaches to hybrid service and share pilot projects
- c. Creating both formal and informal networking and knowledge sharing opportunities
- d. Ensuring collaboration and sharing are sustained between English-Francophone SPOs as well as between rural and urban SPOs
- e. Cultivating data sharing culture and practices sector-wide

**Between the sector and funders by**
- f. Creating opportunities for continuous engagement on expectations, needs and terminology
- g. Supporting SPOs with the resources needed to develop evaluation metrics related to the strategy

**Between SPOs and private sector by**
- h. Exploring partnerships based on reciprocity and mutual gains

**Between sector and researchers, including academia by**
- i. Planning and supporting mobilization of research, including by strengthening access to open data where appropriate
KEY OBJECTIVE

Ensuring High-Quality & Inclusive Settlement Services

Newcomers are at the centre of the design and delivery of settlement services, and can quickly, easily and inclusively access services online and in-person.

IRCC’S STRATEGIC VISION FOR DIGITAL SERVICES

Clients are able to access high-quality settlement services online and can opt to complement these with in-person offerings.
12. Develop a strategy and action plan to align policy, funding, and service eligibility...

13. Develop tools and resources to ensure welcoming and accessible settlement services by

- Providing newcomers with clear and comprehensive knowledge about available settlement services and options for access
- Ensuring access to settlement services is supported by case management and wraparound services including coordinated and holistic approaches that address family and community needs
- Ensuring newcomers are empowered to access services based on their choice and preferences
14. Create and support processes that learn from newcomer information and technology practices by

a. Taking into account the significant variation in context and needs within and between newcomer communities
b. Integrating this knowledge into the design of services catering to newcomer needs and access
c. Supporting research on newcomer pre and post-arrival information practices and technology uses
d. Building towards a more seamless settlement service journey for newcomers from pre-arrival to post-arrival

15. Create a sector-wide commitment to digital inclusion and addressing the digital divide by

a. Embedding digital inclusion into a sector-wide digital transformation strategy, including at the digital services level
b. Basing inclusion on newcomers' digital experience and preferences
c. Supporting sector-wide digital inclusion grant programs
Key Recommendations - Narrative Report
Objectives for Strengthening the Hybrid Service Environment

Strengthening hybrid service delivery means that the settlement sector consistently fosters an enabling service environment characterized by a shared vision of digital transformation, and the baseline capacities, infrastructure and culture needed to achieve that vision.

Digital transformation in the settlement sector means new ways of serving newcomers, building new strategies of service delivery, and creating new forms of partnerships and collaborations. All reports reveal the fact that a sector-wide strategic vision should be developed, supported, and sustained to support digital transformation. As evident in the reports, there is no one clear and dominant strategy that can be emulated in the sector, yet there are key principles and precedents that serve as the framework for this strategic vision.

Reports highlighted two notions associated with digital transformation efforts in the sector. The first is the notion of continuum, meaning that digital transformation should be considered as an ongoing process that constantly builds capabilities that refresh or replace an existing service delivery approach. The second is the notion of divergence, which refers to the fact that not all organizations are in the same stage in their digital transformation. The differences between small centres and bigger Service Provider Organizations (SPOs) as well as rural and urban SPOs in terms of where they stand in their digital transformation are significant, as mentioned in several reports, including The Association for Canadian Studies (ACS) (2021).
Digital Maturity refers to the ability to adjust to the continuous, ongoing and rapidly changing digital landscape. It provides a roadmap that SPOs use to see how their work evolves, a tool to assess SPOs’ ability to deliver hybrid services, and importantly, a shared vocabulary that helps spark helpful conversations within and across SPOs. Two reports (AMSSA 2021 and PeaceGeeks 2021) explicitly state that digital maturity models are useful foundations to build a digital strategy on. AMSSA (2021) emphasized the need for the sector to review existing Digital Maturity Models, Digital Inclusion, and Digital Literacy models from within and outside nonprofit sectors to curate and customize models for the sector. PeaceGeeks (2021) underscored the need for IRCC to create funds dedicated to developing SPOs’ digital maturity.

As capacities and resources currently vary among SPOs, it is important to establish baseline skills and infrastructure as part of the digital transformation vision. Even prior to the pandemic, PeaceGeeks (2019) highlighted the need for establishing a baseline set of standards for technology use in service delivery. It is important to increase service consistency and quality. From a newcomer’s perspective, it will give a realistic estimate of what to expect (at the very least) in their first interaction with a SPO. Also, it conveys the message that newcomers are given the same opportunities regardless of their choice of SPO.

AMSSA (2021) offered a definition of baseline as “floor of competencies”, technologies, infrastructure, digital literacies, digital capacity, etc., that all agencies need to have. From cybersecurity standards (AMSSA 2021, 2022) to professional development opportunities, reports underscored the importance of creating and maintaining baseline skills, standards, and infrastructure that are optimal in a hybrid service delivery context (ACS 2021 and PeaceGeeks 2019).

Reports emphasized two complementary and mutually reinforcing approaches to digital capacity building: contextualized (customized and localized) and continuous (long-term investment focus). They consistently highlighted that the sector needs resources, continuing support, diverse funding structures and partnerships, trust, space, and time to develop a hybrid service vision and capabilities.

“As capacities and resources currently vary among SPOs, it is important to establish baseline skills and infrastructures as part of the digital transformation vision.”

One way of embracing the notion of contextualization is to engage with low-cost, high-impact localization approaches. Reports are consistent in their recommendations that customization and localization are needed in program delivery across different regions and varying population demographics. Newcomers face bureaucratic difficulties while using centralized services, thus ACS (2021) recommended decentralized approaches that provide better service. PeaceGeeks (2021) recommended that IRCC create a National Small Center Working Group (as part of the National Settlement and Integration Council) made up of sector and IRCC representatives from all regions. This will need long-term, continuous investments. AlphaPlus (2021),
for instance, noted that reliance on short-term programs does not adequately address persistent and interrelated issues.

Several digital specialist roles have been created since the beginning of the pandemic. While the specificity and context may vary for every organization, these roles often involve assisting with the acquisition of affordable internet access and devices, as well as offering technical and application-specific support. Reports highlight the need for formalization of newly emerging roles of digital specialists, such as Digital Navigator, Instructional Designer, Digital Pedagogy Specialist, Cybersecurity, Digital, and Data Protection Advisors. It is critical that these positions, as well as those that are emerging, are acknowledged and supported. Also, more investigation is needed to better understand the success and challenges of these roles, with a focus on both organizational and staff needs and solutions.

And lastly, as a part of digital transformation vision and strategy, it is recommended that technology should be seen as a service enabler, not merely infrastructure. This is particularly relevant when we think about the role of technology in newcomers’ lives and settlement journeys. As the International Organization for Migration (IOM) (2021) noted, technology can be an essential lifeline in their journey, with many refugees, for example, identifying smartphones and the internet as being as important for a sense of safety and security as food, water, and shelter. Both PeaceGeeks (2021) and AMSSA (2021) recommended technology as core to program delivery, which must be reflected in planning and forecasting. This recommendation is also emphasized in AMSSA (2022) in terms of how funding mechanisms that are intended to support SPOs’ needs surrounding Customer Relationship Management (CRM) technologies must view technology as an operational expenditure.

“Technology should be seen as a service enabler, not merely infrastructure.”
“Digital literacy should be regarded as a key component of digital transformation and hybrid service delivery.”

There is an overwhelming consensus among reports that digital literacy should be regarded as a key component of digital transformation and hybrid service delivery. The sector needs to be constantly and effectively supported with digital literacy and skill-building education and training in order to make full use of the opportunities afforded by technology while also being aware of and mitigating online risks, cybersecurity, privacy and confidentiality online, as reports recommended. The long-term vision is key. It is also expanded upon in National Settlement and Integration Council (NSIC) (2021) that SPOs will continue virtual service delivery for certain program components post-pandemic, while some require in-person complements. Although some SPOs have undertaken efforts to define the spectrum of digital literacy, there is no widely accepted approach for assessing it. A sector-wide measure of digital literacy needs to be defined in order to offer a sustainable and comprehensive assessment for newcomers’ digital skills and to maintain a mature hybrid service environment.

Reports consistently underscore the need for continued funding and support for training of SPO staff. As several sector stakeholders confirmed, hiring digital specialists would not be enough as hybrid service delivery is highly likely to persist. Therefore, long-term and consistent training is recommended for staff and to support newcomers on how best to use technology in a service context.

AMSSA (2021) recommended three important components of digital literacy assessment:

1) the concept of digital literacy in the sector should be defined with recognizing the uniqueness of clients in different programs

2) assessments should be built in regular work routines and should be contextualized in SPOs’ needs and programs’ demands

3) when designing the assessment, it is crucial to consider clients’ intersectional identities, including race, gender, educational and professional background, sexual orientation, disability, and cultural practices.

Recommendations offer insights into how digital skills should be integrated into everyday programs. For example, IOM (2021) emphasized the need for Canadian Orientation Abroad (COA) to explore designing and providing digital literacy and skill-building content directly as part of the regular curriculum, while also doing continued awareness-raising around the inclusion of digital skills as part of Pre-Departure Orientation (PDO) training. This will enable newcomers with minimal previous exposure to digital devices and tools to learn the essentials of online security (e.g., data protection online, password protection, and identifying online fraud). It also carries value for newcomers with more mature digital literacy skills to be further informed about online resources available in Canada to assist with resettlement.
“Understanding technology as a core operational cost, as noted previously, would require long-term, continuous support in investing in digital infrastructures and systems.”

Understanding technology as a core operational cost, as noted previously, would require long-term, continuous support in investing in digital infrastructures and systems (e.g. devices, software, hardware, and newcomer support tools) for SPOs that continue to support organizational digital transformation.

One component of this, as recommended by AMSSA (2021, 2022) and PeaceGeeks (2019, 2021) is continued guidance on technology, platforms, and tools that support SPOs to prioritize and adopt those systems that are critical to hybrid service delivery. This guidance on baseline technology is important as many SPOs are presently dealing with information overload on how to navigate digital environments without clear and formal guidance on secure and trustworthy digital infrastructure. This notion is further reinforced in NSIC’s (2021) strategic aim of providing consistent guidance to the sector by identifying best practices on cybersecurity, privacy, and digital inclusion, as well as developing norms and standards for digital service delivery.

Critically, recommendations are consistent in terms of ensuring long-term and comprehensive funding for SPOs’ digital infrastructure and Information Technology (IT) tools. AMSSA (2022) highlighted the need for technology applications to be seamlessly linked so that no manual intervention is required.

Finally, IOM (2021) emphasized that the introduction of digital tools should be based on an understanding of the context, strategies for overcoming barriers (such as literacy, trust, affordability, connectivity, and disability), risk mitigation, and an acknowledgement that digital approaches may not be appropriate or accessible in all circumstances.
Reports consistently underscore the need for culture change in the sector that promotes innovation and skills development. They further suggest that the sector cannot engineer innovation culture, and that it is ultimately about people and their behaviors. It is a natural process that occurs over time. The question then becomes “What can be done to establish incentives for stakeholders to adopt a culture of innovation?” The reports highlight three levels of focus.

“Leadership is key, as PeaceGeeks (2021) noted, in protecting and rewarding well-informed risk-taking at the organization, while acknowledging both successes and failures are equally meaningful opportunities to learn and grow.”

First, at the organizational level, SPOs should embrace openness to test, learn, and listen to new voices, and experiment with new ways of service delivery. Leadership is key, as PeaceGeeks (2021) noted, in protecting and rewarding well-informed risk-taking at the organization, while acknowledging both successes and failures are equally meaningful opportunities to learn and grow. As the report underscores, leadership needs to show the commitment to culture change, which is reinforced by trust between leadership and staff, in both directions. Additionally, AMSSA (2021) indicated hiring from across-disciplines and fields, particularly digital specialist roles, brings opportunities to rethink and reimagine service delivery, contributing to a long-term culture change.

Secondly, at the sector level, the reports focused on establishing incentives and formally recognizing the value in creating collaborative culture. PeaceGeeks (2021) shared existing examples of forming rural settlement networks where larger and smaller centres can connect and support each other with best practices and resource sharing. The report also highlighted additional best practices that IRCC has actively supported, such as collaboration among extremely small agencies. ACS (2021) further noted its value in terms of bridging knowledge gaps between SPOs.

And lastly, at the funders level, reports recommended that funders need to commit to cultivating a change culture through flexible funding models and approaches. As previously noted, a culture of innovation requires time and space to organically evolve, thus incentives need to match this need. The reports highlighted the need for long-term funds and continued incentives that address innovation-focused needs in the sector. ACS (2021) recommended small, innovative, successful projects be scaled up to larger organizations when they have been proved useful, rather than developing large-scale programs that cannot be scaled down for smaller rural communities.
Objectives for Enabling Innovation

Enabling innovation means that SPOs’ skills, commitment, and desire to innovate are supported with a shared innovation mindset, enhanced data skills and use, and continued funding.

Over the last year, we have seen a lot of adaptation, evolution, and innovation from SPOs. It is consistent across all the reports that there is a wealth of expertise, skills, and commitment among the sector, and a strong desire to innovate and bring value to the lives of newcomers. Settlement practitioners are continuously “thinking on the edge of the box”. They innovate with what is available while also searching for further innovation. Because of innovation and promising digital practices, SPOs have been able to maintain service consistency during the pandemic, as stated in NSIC (2021).

To ensure the sustainability of innovation, innovative programs, practices, and services must be incentivized, invested in, and implemented consistently. From newcomers’ perspective, it is only meaningful to forge new pathways in their settlement journey if those pathways constantly bring value to them.

As recommended in AMSSA (2021) and PeaceGeeks (2021), the sector should conduct cross-sector research for promising innovative practices and examples in order to replicate in a way that fits the sector’s needs and realities.
While the sector is experimenting with new ways of designing and delivering service, it is important to remember that the sector has yet to choose an agreed-upon definition of innovation. The reports consistently captured this need and emphasized the importance of establishing sector-wide conversations on developing concepts, vocabularies, and a clear, shared understanding of what innovation is for the settlement sector, what value it brings to hybrid service delivery, and what innovation could look like in practice.

Defining innovation and formally acknowledging innovative practices both have strategic importance for charting the future of innovation within the sector. As NSIC (2021) noted, sector stakeholders have a desire to capitalize on innovation and promising practices that have occurred since the pandemic and moving forward. Having a shared understanding and common conceptual tools will facilitate sectoral conversations around innovation.

PeaceGeeks (2021) highlighted some characteristics of innovative practices, such as:

- Work that is centered on partnerships and collaboration;
- Work focused on addressing systemic barriers;
- Holistic and newcomer-centric approaches, grounded in community, and;
- Use of technology to facilitate access to services and/or improve service provision for newcomers, whether directly or indirectly.

Phase 1 of PeaceGeeks (2021) Settlement 3.0 project offered a definition of innovation as “the digital and non-digital practices and approaches that foster the adaptability and agility needed to enable the settlement sector to stay ahead of the curve in a rapidly changing migration and settlement landscape, with the goal of better serving newcomers to Canada.” The report noted the need to distinguish between innovation (a process of developing something genuinely new) and iteration (a process of refining what is already working to make it even better).
Reports underscored the importance of data use at the individual, agency, and sector levels in moving the sector’s innovation forward. Efficient data practices (collection, use, sharing, and analysis) are essential in managing and delivery of services, evaluating their impacts, and planning for the improvement of programs. Data practices continue to be a major pillar of outcome-driven service and programming, which is one of IRCC’s CORE Principles as outlined in PeaceGeeks (2020).

To achieve this, it is important to have coordinated and collective data capacity building efforts. As recommendations underscored, supporting SPOs in identifying data gaps and data needs is a critical area of focus, which will require expertise, resources, and continued support in developing organizational data capabilities (PeaceGeeks 2019; AMSSA 2021). ACS (2021) emphasized the need for longitudinal data in capturing patterns and processes more completely throughout the settlement journeys of newcomers, which requires further collaboration with policymakers.

From an outcome measurement standpoint, SPOs, especially those serving rural areas, lack a detailed picture about their service impact partly because client feedback mostly relies on informal mechanisms. ACS (2021) further noted the need to harness immediate and anecdotal feedback, especially in smaller communities where casual encounters are common. Additionally, AMSSA (2021) recommended that the sector and SPOs investigate the prospects provided by digital technologies in-built data analytics capabilities. As the report noted, this would necessitate resources for the development of a set of skills, tools, and guidelines for dealing with the ethical aspects of data work.

Another core component of recommendations related to data use is setting up a secure, central hub that brings together datasets from different SPOs to facilitate referrals and connect with other SPOs. According to ACS (2021), this may be accomplished by utilizing a standardized needs assessment for each newcomer inside a common database. The database may then be used to track settlement process outcomes and outputs. Additionally, the report noted that settlement data could be combined from federal, provincial, and local databases into a single platform to create a more comprehensive picture of the efficiency and effectiveness of settlement services. Importantly, such data practices would require organizations to have strong knowledge and skills about data, data management expertise, and data culture, as highlighted in PeaceGeeks (2019).
FUNDING MODELS

According to recommendations, the funding ecosystem appeared as the major determinant of innovative practices in the settlement sector. Reports consistently addressing those funding models should recognize that hybrid service delivery is not a destination, but is instead a journey that needs time, resources, expertise, and ability to incubate new ideas, leading to innovation in the settlement sector.

Reports emphasized the importance of flexible funding for innovation, continuity, and sustainability. PeaceGeeks (2019, 2020, 2021) and AMSSA (2021) emphasized that flexible funding is essential for SPOs to be able to adapt programs and responses. This would free up valuable time for staff to concentrate on their essential mission: providing newcomers with high-quality settlement services. Additionally, teams and managers would have the time and space they need to reflect on big picture priorities, internally evaluate their work, and optimize workflows and activities in order to promote evidence-based programming. These would be valuable gains for the sector with funding models being transferred to be long-term, consistent, and with simplified application procedures.

Similarly, ACS (2021) noted that the provision of core costs (e.g. unrestricted or partially restricted financial support for SPOs’ administrative and other core expenses) would positively impact SPOs’ internal capacity to innovate. This would help SPOs to enhance staff job security and increase human resources capacity by attracting and retaining a pool of digital talents.

“The provision of core costs would positively impact SPOs’ internal capacity to innovate.”

PeaceGeeks (2021) further recommended that funding can be especially helpful in integrating technology to make daily tasks more efficient or in creating a centralized service for offloading administrative duties, and eventually winning more time for innovation projects and experimentation. Alternatively, SPOs should be funded to support the creation of staff positions committed to developing and advocating innovation. As reports indicated, the pandemic created momentum for the sector and its key funder to acknowledge what SPOs could accomplish with flexible funding that allowed them to react and adapt to the rapid shifts and find innovative responses to newcomers’ needs.

Both PeaceGeeks (2021) and AMSSA (2021) identified open and consistent communication with funders as a crucial aspect that allowed SPOs to delve further with unrestrained thinking and planning, resulting in innovative practices and service solutions. Other reports have also backed up this recommendation, emphasizing the critical need of maintaining an open, transparent, and consistent communication culture between SPOs and funders that allows for rapid information sharing. PeaceGeeks (2021) noted the importance of a supportive attitude and open dialogue with IRCC program officers, coupled with flexible funding, as shown during the pandemic, in boosting SPOs’ ability to respond innovatively. As reports indicated, this information sharing and dialogue not only provides an important basis for iterations on program design.
and implementation, but also allows both SPOs and funders to better assess early indicators of success for service outcome.

Integral to this dialogue between the sector and its funders, the reports indicated that current funding models are struggling to fully capture the impact of service in the long-term due to an overreliance on outputs or a “hitting the target” mindset. Measuring outcomes is always an issue in human services. However, it is more challenging for smaller and remote settlement centres. An example that serves to illustrate this issue is present in ACS (2021) where rural SPOs feel they were penalized for not having enough clients. However, due to pandemic and lack of childcare, fewer newcomers were able to access the centres. When combined with newcomers’ lack of access to digital services, this issue demands particular attention and further conversation between SPOs and funders.

Critically, the reports entail the recommended mindset shift for funders in terms of nurturing a culture of innovation and collaboration at the sector level.

Geeks (2021) recommended that some funding schemes should include collaboration as an application precondition. Such partnership would bring benefits for all, but especially for smaller centres with limited infrastructure. This notion is echoed in AMSSA (2021) as well, which references the value of partnerships in enhancing the digital capacity of smaller centres.

In addition to that, recommendations emphasized that funding models should support risk-taking, hypothesis testing, and iterations. It is evident that SPOs are willing to test ideas but they need to feel safe to fail and continue learning.

“One incorporate incentives and rewards that encourage meaningful collaboration rather than competition in the sector.”
Objectives for Mobilizing Knowledge

Mobilizing knowledge means that all SPOs are funded, supported, and encouraged to participate in formal and informal information sharing mechanisms to build, share, and replicate sector knowledge.

Prioritizing Collaboration and Information Sharing

A consistent theme across all reports was that there is a need to develop a shared vision, culture of understanding, and ways of working toward innovation in the sector. Collaboration and communication between key stakeholders are considered essential components of this. PeaceGeeks (2021) further illustrated what sector stakeholders believe are key drivers of innovation in the sector: embedding partnership and collaboration, holistic and newcomer-centric approaches across service design, and delivery with a commitment to address systemic barriers.

It is important to define and formally recognize the value of innovation to the sector (AMSSA, 2021; PeaceGeeks, 2021). Importantly, there have been several promising innovative practices that are well-documented in the reports, both before and after the pandemic. While examining the reports, it has been noticed that reports accurately capture that innovation is happening in several ways, in different forms, and at different levels. Getting the basics right would constitute innovation for some SPOs that are in the early stages of their digital transformation journey, while for others it means engaging technology in a sophisticated manner. Equally important, this does not just apply to technology, but to people, interactions, and processes. As PeaceGeeks (2019, 2021) noted based on its analysis of best practices in the sector, innovation mostly occurs within the relationship between newcomers and settlement workers and within the unique experience of settlement workers (who have immigration experience). This recommendation is also endorsed in ACS (2021), which notes that innovation can be built through connecting community, post-secondary institutions, and other stakeholders, as well as combining public and private funding.

Among the reports, it is consistently recommended that IRCC, the sector’s core funder, and SPOs, should communicate, collaborate, and create ways of bilateral dialogue between IRCC and organizations. This should encompass all stages of service delivery, from program design through implementation, monitoring, and evaluation.
The recommended way to approach this, as PeaceGeeks (2021) highlighted, is to develop a sector-wide definition of client “outcome”. This is critical in terms of enabling the sector to discuss and provide evaluation frameworks for novel projects and innovative practices. As AMSSA (2021) noted, many SPOs have created their own methods to measure outcomes to reflect their service quality and adapt hybrid service delivery accordingly.

Integral to this, feedback mechanisms on outcome evaluations between IRCC and sector organizations should be promoted. More information sharing between IRCC and SPOs is needed to share lessons learned from both successful and unsuccessful projects. Explicit in the reports’ findings, sector stakeholders are increasingly aware of this critical need. As PeaceGeeks (2021) captured aptly, IRCC is also receptive to receiving innovative approaches from SPOs on reporting service outcomes.

It is also recommended to initiate knowledge mobilization activities to foster sectoral learning. AMSSA (2021) underscored the need for establishing a knowledge mobilization approach at IRCC to actively share learning from funded projects, including Service Delivery Improvements (SDI) projects, at the national and regional levels. PeaceGeeks (2021) reemphasized this by recommending the creation of physical and virtual spaces dedicated to SPOs’ innovative ideas and hypotheses to flourish and discuss innovative work.

Importantly, the recommendations also underscored the need for creating both formal and informal venues for information sharing, networking, and dialogue. For example, ACS (2021) highlighted that events such as conferences, workshops, and focus group discussions enabled several SPO staff to learn from each other as the sector pivoted online. Similarly, PeaceGeeks (2020) highlighted the need for official platforms for collaboration. At the same time, for many SPOs, informal connections (e.g. running into someone) offered unique opportunities for information gathering.

“The main driver which stimulates innovation from the intention stage to the implementation stage is cross-organizational knowledge sharing and collaboration.”
Reports also addressed how critical these networking and knowledge-sharing platforms are for the sector as they help SPOs identify areas of collaborative future work. Critically, as they recommended, more efforts are required to have a sustained and deeper partnership between Francophone and Anglophone SPOs as well as between urban and rural SPOs. It is critical to break down silos and ensure that every stakeholder participates equitably in national-level conversations.

“IOM (2021) recommended the establishment of a Working Group or a Community of Practice that allows sharing of lessons learned and best practices [for pre-departure and post-arrival service providers]”

Another important area of information exchange is between pre-departure and post-arrival service providers. IOM (2021) recommended the establishment of a Working Group or a Community of Practice that allows sharing of lessons learned and best practices. It would be critical for these two groups to communicate and learn from one another, since each have extensive digital service delivery expertise, have developed new tools, and have tested them in their own operating contexts. The report suggests that such a platform would benefit in ensuring service gaps are bridged.

This resonates across several recommendations on the value of smaller centres in optimizing sector innovation (AMSSA, 2021; PeaceGeeks, 2021). PeaceGeeks (2021) highlighted that smaller centres have similar needs and capabilities in terms of innovation. Their approach is newcomer-centered, as reports signaled.

Smaller centres, grounded in community, are uniquely positioned to deliver services and programs by identifying what newcomers expect rather than by deciding what to offer and tailoring resources, although limited, based on newcomers’ needs, creatively and collaboratively. PeaceGeeks (2021) further recommended IRCC should create a National Small Center Working Group (as part of NSIC) made up of sector and IRCC representatives from all regions. This clearly indicates an opportunity for the sector to learn from smaller centre SPOs and to elevate their voice in national conversations.

Recommendations also highlighted the value of SPO-private sector partnerships in fostering innovation in the sector. Reports (PeaceGeeks 2019, 2020, 2021; AMSSA 2021, ACS 2021) underscored the importance of such collaboration in terms of leveraging private organization’s resources and capacity on technology, new funding sources, and forming long-term relationships based on reciprocity and mutual advantages. These recommendations share core attributes in the experiences of the sector with innovation, as captured in PeaceGeeks (2019): innovation cannot occur in survival mode.

Reports also highlighted the value of sector engagement with academics and researchers in supporting innovation, including through academic knowledge mobilization activities, access to systematic knowledge on digital technology use and
innovation in context, and fostering creative collaborations. Academic research is limited, as Turegun et al. (2018) (cited in PeaceGeeks, 2019) indicated, to capture the impact of settlement services on client outcomes.

Other strategic areas exist. As PeaceGeeks (2019) noted, these are open data and digital services, and transformative use of service data, such as client feedback information. Open data refers to purposefully releasing data in any machine-readable format for free and non-exclusive use, re-use, and redistribution by any party. In the context of settlement service delivery, it is important to collaborate with researchers and academics to engage with data, connect the dots in different service delivery schemes and outcomes, and glean new insights about newcomers’ settlement journey. Critically, these processes must be in accordance with responsible data practices.

Ultimately, being innovative is about having the right information, the ability to use it efficiently, and appreciating its opportunities in everyday service delivery. The recommendations highlighted the importance of improving SPOs’ research capacities. For example, ACS (2021) advocated for establishing a “center of excellence” where organizations with greater research capacity conduct analysis and disseminate information across the sector, allowing smaller organizations with lesser capacity to obtain knowledge. Others (AMSSA, 2021, PeaceGeeks, 2021) recommended a whole-of-sector approach in which the sector and organizations are funded to develop their data practices (e.g. use, share, and analyze data ethically and efficiently) for service delivery and enhancement purposes.

“It is important to collaborate with researchers and academics to engage with data, connect the dots in different service delivery schemes and outcomes, and glean new insights about newcomers’ settlement journey.”

1 In accordance with the reports, we use the term “smaller centers” to refer to rural, remote SPOs to differentiate them from urban SPOs.
Objectives for Ensuring High-Quality and Inclusive Settlement Services

High-quality and inclusive settlement services means that newcomers are at the centre of the design and delivery of settlement services, and can quickly, easily, and inclusively access services online and in-person.

SETTLEMENT SERVICE ELIGIBILITY

“It is time to recognize this opportunity and make settlement services “welcoming for all” as Canada’s immigration system increasingly creates pathways to permanent residency for those with temporary status.”

Both PeaceGeeks (2021) and ACS (2021) also highlighted the need for an expanding service landscape for all newcomers regardless of their immigration status. This has been acknowledged in several reports, particularly related to the challenges SPOs face in serving international students and temporary foreign workers. While these demographics have traditionally not been part of the main target audience of IRCC eligibility, requiring “permanency” for service eligibility makes little sense since SPOs aim to improve the well-being of all community members and make every newcomer feel welcome in Canada by already serving these communities. Moreover, as AMSSA (2021- Appendix4) showed, newcomers with any status are already benefiting from digital-first services (publicly available websites, apps, etc.) which do not require eligibility criteria. From a service consistency lens, it is critical to operationalize SPOs’ service to all demographics. Thus, recommendations emphasized that IRCC should enable SPOs to formally serve international students and temporary foreign workers. It is time to recognize this opportunity and make settlement services “welcoming for all” as Canada’s immigration system increasingly creates pathways to permanent residency for those with temporary status.
WELCOMING & EASILY ACCESSIBLE SETTLEMENT SERVICES

Recommendations emphasized the need to create more welcoming and easily accessible settlement services. They are grouped into two areas: information sharing about services, and further assistance to service accessibility.

Recommendations suggested that newcomer communities should be made aware of settlement services through sharing information about available services. All reports noted that newcomer profiles and demographics are changing so quickly, as are the types, nature, and rhythms of their settlement needs and how they can be met. And the pace of change is unlikely to slow.

From the perspective of newcomer information practices, information should be accurate, adequate and timely, carefully classified, easily accessible, culturally and linguistically tailored, and delivered by trusted sources through a medium that newcomers are already actively using. This would reduce confusion and cognitive load on newcomers, allowing them to act on information confidently and increase the likelihood of future service use.

Recommendations underscored the value of informal newcomer networks and social media and messaging platforms (e.g. WhatsApp, YouTube, Facebook groups) in disseminating information about settlement services. Moreover, ACS (2021) recommended collaboration with other agencies, and community organizations as well as public and private institutions (e.g. libraries, religious institutions) to circulate information and create awareness.

ACS (2021) and IOM (2021) also highlighted the importance of providing information at the pre-arrival stage in terms of streamlining the immigration process, delivering accurate information, and managing newcomers’ expectations.

“Wraparound services are a broad range of tailored assistance designed to suit the particular needs of newcomers, such as providing transportation, child care, or device support to enable them to attend programs, both physically and online.”

And lastly, recommendations suggested that wraparound services should be adequately provided to newcomers in ensuring their access to settlement services. Wraparound services are a broad range of tailored assistance designed to suit the particular needs of newcomers, such as providing transportation, childcare, or device support to enable them to attend programs, both physically and online. As reports suggested, this assistance has proved to be critical in creating a welcoming and inclusive service environment. SPOs should be supported with flexible funds to be responsive to these needs.
EMBEDDING NEWCOMER-CENTRED APPROACH INTO PROGRAMMING

“One of the central features of high-quality and inclusive services is putting newcomers at the centre of program design and development. This entails understanding newcomers’ needs and expectations, and co-crafting services and programs revolving around their experience, expertise, and goals. As reports highlighted, this admittedly requires resources, skills, and knowledge that may not be currently available through SPOs but which should be adequately supported by funders.

PeaceGeeks (2019, 2021) recommended employing an asset-based approach to operationalize a newcomer-centered lens in developing settlement services. An asset-based approach recognizes the assets, talents, skills, and capacities of newcomers as well as their communities and networks as opportunities for community development, and enables newcomers’ expertise to drive services. This method provides a strong alternative to solely focusing on a community’s issues and deficiencies.

PeaceGeeks (2019) highlighted the option for SPOs to conduct an asset-based review of communities they are situated in and identify potential to collaborate. Programs could be actively co-designed with community partners in order to generate innovative approaches to service delivery that address both newcomer and community needs. Some of these resources could be utilized in coordinating wraparound efforts.

Alpha Plus (2021) emphasized the necessity of intentionality in utilizing newcomer-centred approaches in designing a literacy learning framework for newcomers. They highlighted that it is not about integrating newcomers into a testing process for the sake of reporting. Rather, the active participation of newcomers should inform all aspects of program design and development.
The reports highlighted that the COVID-19 pandemic has resulted in an immediate and widespread public need for reliable and equitable digital inclusion strategies. As NSIC (2021) pointed out, the pandemic exacerbated existing barriers for newcomers, particularly those with low language and digital literacy. AMSSA (2021) defined digital inclusion as “the activities necessary to ensure that all individuals and communities, including the most disadvantaged, have access to and use of technology. It requires intentional strategies and investments to reduce and eliminate historical, institutional and structural barriers to access and use technology.”

“Every report contained recommendations explicitly related to digital equity and inclusion, touching on both structural and individual level aspects of inclusive digital access.”

Every report contained recommendations explicitly related to digital equity and inclusion, touching on both structural and individual level aspects of inclusive digital access. At a structural level, digital inclusion is about creating an enabling ecosystem (e.g., access to electricity, the Internet, devices, and quality of that access) and a supportive environment (e.g., particularly in terms of affordability, trust, and security). At an individual level, it is about having material access (e.g., infrastructure, speed, as well as costs associated with connectivity), digital skills, individual motivation to acquire and use technology, and social and demographic factors shaping them.

As reports highlight these as parameters of the digital inclusion agenda, recommendations underscored that the sector should establish concrete guidelines on digital inclusion and equity to ensure high-quality and inclusive settlement services for newcomers.

The sector-wide discussion should first aim to provide a shared understanding of what digital inclusion means and goals and priorities of action. Across reports, it is evident that what it means and what is needed to be digitally included in hybrid service delivery should be informed by social justice and an equity lens. Both IOM (2021) and AMS-
SA (2021) detailed the contextual complexities of digital access and connectivity in newcomers’ lives. Gender, race, ethnicity, education, socio-economic status, immigration status, age, urban/rural divide, and living with disabilities continue to shape newcomers’ digital inclusion. Moreover, newcomers with lived experiences of intersectional inequalities have to confront compounded difficulties.

As IOM (2021) recommended, development of digital inclusion efforts should be based on newcomers’ digital experience and their preferences across digital channels. It is nevertheless critical to find the right balance between familiarity, usability, and security and privacy as new digital opportunities are considered.

Additionally, recommendations emphasized the importance of recalibration in digital inclusion efforts. According to IOM (2021), the transition to digitalization should not come at the price of sustained investment for in-person group training, which is critical for immigrants, and particularly refugees, as they prepare for their new life in Canada. There are critical human components to service delivery that technology will never be able to replace. This echoes AMSSA (2021)’s recommendation that we should not assume that once individuals have access to technology or the internet, they will access services independently or that they will want to be served digitally. Incorporating non-digital and low-technology approaches should also be viewed as part of hybrid service delivery continuum.

As recommendations highlighted, this baseline on digital inclusion understanding can be utilized to develop strategies and action plans to enhance hybrid service delivery. AMSSA (2021) proposed the establishment of digital inclusion grant programs to assist the promotion of digital inclusion initiatives in the sector. NSIC (2021) recommended identifying best practices on cybersecurity, privacy, and digital literacy.
APPENDIX A: LIST OF REPORTS CITED

Primary Reports


*Remote Service Delivery Survey Results and the Path Forward.* National Settlement and Integration Council. IRCC. (2021, December) [English Version](#)


Secondary Reports

APPENDIX B: SETTLEMENT ACRONYMS

ACS: Association for Canadian Studies

AMSSA: Affiliation of Multicultural Societies and Service Agencies of BC

COA: Canadian Orientation Abroad

CRM Technology: Customer Relationship Management

IOM: International Organization for Migration

IRCC: Immigration, Refugees and Citizenship Canada

IRCC CORE Principles: Client-centered, Outcomes-driven, Responsive to need, Effective use of resources. Underpins all programming funded under the Settlement Program and the Resettlement Assistance Program.

IT Tools: Information Technology

NSIC: National Settlement and Integration Council

PDO: Pre-Departure Orientation

SPO: Service Providing Organization(s)

SDI: Service Delivery Improvements