

25 Years of Digital Transformation in the Settlement Sector: Past, Present and Possible Futures - session notes

I'm always inspired when I chat with folks in the sector, but this session reminded me of the incredible wisdom, knowledge, and passion that exists if we just ask! If you were in our session or weren't at the conference but want to be involved in next steps, connect with me:

Marco Campana
marco@marcopolis.org
www.km4s.ca

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Session description

Join us for a moderated discussion on where we've been and where we're going when it comes to digital transformation in the settlement sector. We'll highlight emerging and promising digital practices in service provision. You will hear from a variety of practitioners from Canada and abroad on what the settlement sector can do to address digital inequality, and what the future of technology in settlement can look like. Audience participation is strongly encouraged! This session is being organized by ACS-Metropolis, with the support of the WES Mariam Assefa Fund.

My co-panelists [Nick \(Naeem\) Noorani](#), [Jennifer Freeman](#), [Shona Munro](#), [Irene Mackintosh](#), [Salwa El Haouti](#), [Danielle Pentland](#), Sarah Kooi, [Stephanie Wilson](#), [Abdulla Daoud](#), Deirdre Lake, [Shay Sharma](#) provided the crowd with some new information about their emerging and promising practices, some important perspective, and enthusiasm for collaboration.

Then we turned it over to our amazing and engaged group of sector peers in the room.

Getting folks thinking

As an icebreaker I asked our participants: How do you feel your organization is doing when it comes to transitioning to a hybrid service delivery model?

They could choose from:

Surviving - Getting by; doing what we need to, using digital tools; focused on short-term goals; talking about remote work, Newcomer involvement

Striving - Planning & talking about how work is changing; medium-term goals; planning remote work, how Newcomers can be involved in service design

Thriving - Hit our stride, hybrid service strategy; long-term goals; implementing remote work strategy, Newcomers involved in service planning

([Source of this scale – The Moment’s Disruption Canvas](#))

Most landed in **Striving**. This is consistent in other sessions I’ve run.

Interacting, learning, sharing, and building together

The enthusiasm from my co-panelists immediately spilled into the breakout sessions we ran, and they were fantastic. 1 hour and 15 minutes wasn’t enough. Many stuck with us past our allotted time to continue sharing and reporting back. And what it confirmed for me is that this is an important conversation we are not having in our sector.

I created 11 scenarios for potential discussion at the session ([you’ll find those in the Appendix below](#)). We broke into small groups to discuss a few in the session. We followed an approach and discussion guidelines borrowed from [Integrated Advocacy - Paths Forward for Digital Civil Society \(2020\)](#))

Even with the time constraints we managed to quickly come back together and share the top issues/considerations from each group. There is so much here to continue diving into! [And we will!](#)

So here are the top issues/considerations that came out of each of these discussion scenarios that were covered:

- [Hybrid Service Delivery and Sustainability and Resilience](#)
- [Digital Maturity and Transformation](#)
- [Partnerships and Collaboration](#)

- [Digital Inclusion](#)
- [Data Management and Analytics](#)

Hybrid Service Delivery and Sustainability and Resilience

1. Change management
 - a. We need protocols for online services that include recreating and rethinking how we do our work
 - b. Hybrid work models are emerging, remote work continues, what does this look like in an organization? How can it be managed? What does it mean for staff relationships, morale, cohesiveness? How does it impact Newcomers being served?
 - c. What does a digital transition risk assessment look like as we shift to a hybrid service and work model? What about as we move clients between online/remote and in-person service delivery? For staff? I've never thought about the shift to hybrid service and work like this, but when it came up in our group it just made sense!
2. Avoiding technology utopia and solutionism to focus on embracing possibilities and needs within our sector and organizational context
 - a. Everything involves digital, whether the context is in-person or online - all services use tech
 - b. Sector service portals are operational and emerging, how do we ensure that the massive amounts of data being collected and generated are streamlined to avoid data input duplication by Newcomers and staff, and that data is portable in interoperable systems that ensure security, privacy, and confidentiality?
3. Funding for tech tends to be project-based, which is increasingly problematic as technology becomes part of our core needs and reality
 - a. There is hidden overhead, licensing costs, human resources, ongoing development and iteration that are not factored into existing funding models.
4. Access and anxiety focused on digital equity concerns are real and not being addressed systemically in our organizations, impacting staff and organization resilience
 - a. Tech shame is real! We're not taught how to use the tech we use for the workplace scenarios we need to use them in, but are expected to come to the job with the skills.
 - b. Onboarding clients with digital literacy barriers, online facilitation and engagement skills, being able to shift seamlessly between in-person and online work in a highly personalized way with all clients are just some of the emerging soft skill areas that require training, baselining and attention

5. Hybrid means in-person too!
 - a. Too often, including in this session's discussion, when we talk about hybrid services or models, we default to a conversation about technology, virtual, and online service delivery. We need to ensure that how in-person service evolves and continues to be prioritized, accessible, and available is part of that discussion.

Digital Maturity and Transformation

We have similar challenges across each group, even though we were in different areas serving different types of clients. We had similar challenges around technology, how we were using technology, how the pandemic shifted things dramatically, but there was a new normal before that has changed, requiring new processes and requirements, and that client expectations have dramatically shifted, there's been a new diversity in how we're even doing this service delivery model. There has to be alignment and strategizing between clients, users and the organization and then that sets the funder as well.

1. Resources - there's a lot about conversation within our communities within our organizations, such as being able to say that needs are constantly evolving, staff being able to learn and being pushed to going to online
 - a. Needs are constantly evolving
2. Capacity building - If clients have the correct tools or the ability to update, utilize those tools and digital transformation. Many service providers don't all have their own phones, they don't have the tools necessary to even participate fully in a digital world. And so without the tools, the training, the programming, how are they expected to help the clients overcome these barriers?
 - a. Staff not being ready to go online - staff capacity
 - b. Clients not having tablets or smartphone
 - c. Lack of tools to pick tools
3. Funding
 - a. IT resourcing side - how funding operates
4. Policy (IT, Funding, External, Internal)
 - a. Organizational policy adapting and funder funding and policy changes
 - b. we have different systems that people use, and how multiple people or how different people are using multiple systems at the same time, again, that interlock portability between our systems and tools.
5. Sector tailored tools
 - a. Share information and security guidelines - most so with front line
 - b. Needs are constantly evolving, staff being able to learn and being pushed to going to online

- c. Client expectations have changed - more diversity has been added to the service delivery model. There has to be alignment and strategizing between clients and users

Partnerships and Collaboration

Overall the group identified some of the challenges and then discussed how to fix those challenges. A lot of the challenges were lack of this lack of that. So the solutions ended up being to create something to address those gaps.

1. Digital Divide - talking about organizations, folks getting left out. So whether that's organizations that haven't been able to catch up quite yet, whether it's, you know, Quebec, which gets left out, whether it's rural communities.
2. Addressing the information overwhelm - Post arrival, not quite understanding pre arrival services and the way things work. There is a need for a unified, centralized platform, but specifically a shared platform. Something especially with interoperability where people can work together and share within the system, and also technology that can communicate with each other.
3. Looking at partnerships between private and public to look outside of just the government funding models. Collaboration tied to incentives, breaking down the silos.
4. Looking at one of the sector wide tools that should be developed or that are already there that we should just agree on - identify the one to use
5. Idea incubators where we can all contribute ideas, ensuring that we're on the same page.
6. Collaborating to understand how the technology is being used, and how we're building technology together.
 - a. A big part of collaboration is that everyone's voices should be heard.
 - b. And another, bigger, more important reason is just to ensure that the government's hearing our voices, because the government's also operating on a technology sector, they're also creating stuff. And we're creating stuff. So if we continue to work in parallel, rather than together and to work off of each other, we're going to be not just competing, we're going to kind of split off.
 - c. So the idea is, collaboration is not just hey, you use this, I use, let's use this together. But it's also like, what do you want to see? What do you want to have changed? And how can we ensure that these changes are being brought up to the right people? And how can we ensure these changes are actually going to happen? Because as we focus on cool tech tools like AI we still work with people who can't open emails. And they need to be factored in and heard.

What are the challenges you face with regards to supporting digital inclusion work?



1. When we talk about digital inclusion, it's not just about the clients that we're serving, but it's also about the organizations that we are a part of.
 - a. There has to be buy in from a change management perspective, buy in at senior leadership levels, to understand the impact of systems from a service perspective (saves money; more efficient etc) but also that the service user has to be supported to access this innovation.
 - b. Importance of keeping up with the times and understanding how to use these wonderful innovations.
2. Funding and capacity building
 - a. Many service providers don't all have their own work smartphones, they don't have the tools necessary to even participate fully in a digital world. And so without the tools, the training, the programming, how are they expected to help the clients overcome these barriers? Funding is key to doing that.
3. The mindset that digital inclusion work isn't something that shouldn't be an afterthought
 - a. It should really be embedded into the DNA of all of the service delivery, and program of work that is being done.
4. Where does privacy legislation, which is different across the country, impact what you're doing?
 - a. There's no federal privacy legislation. It's not consistent. Each province has its own legislation, and that, therefore, you cannot transition a client from one province and we don't have lots of inter provincial movement. You can move clients between one province and another.

Digital Inclusion Discussion insights (from Mhor Collective's Irene Mackintosh)

“Frontline staff often struggle to keep up with rapid advances in technology and the systems around them, and often there has been little or no accommodation made to develop the necessary digital skills for work, with everyone learning as they go, which means a lack of uniformity and a workplace skills-gap. This also immediately impacts on staff confidence in cascading skills to those they stand alongside. Furthermore, many staff, themselves, have limited access to technology for work, with some agencies failing to recognise that this type of engagement is a necessary part of frontline work, and with an expectation that staff are able to 'make do'. People are often using their own phones, blurring boundaries between professional and personal lives, which, in the context of this field in particular, can mean that staff are facing some difficult challenges in creating space for themselves. This, coupled with some frank decisions around salary scales, and the increasing cost of living means that we can definitely not make any assumptions that staff have the digital tools, connectivity and skills they need to do this work. This needs recognition at strategic and senior management levels, as well as investment, commitment and resource.

Frontline staff noted that newcomers are often also overwhelmed by the digital space, some focussed on 'just surviving' and getting through a myriad of systems, forms and tasks related to the immediate issues in front of them, rather than thinking about engaging immediately with digital literacy pathways. For some people, language presents an additional obstacle, with digital skills support in a language not their own adding to frustrations and stress.

The digital space also, unsurprisingly, flags up culturally specific issues, for instance, where newcomers may have had varying access to the internet in their countries of origin, or perhaps that access may have been subject to state surveillance. Such challenges can really impact on overall confidence, making the digital champion, a trusted intermediary with a shared cultural understanding, the ideal go-to person to work through challenges in a person-centred way, creating safe spaces for conversation. We also heard again familiar discussions on misinformation, data privacy and data security. Again, as in Scotland, these topics can and must be explored through a digital inclusion lens to ensure that people in frontline work feel confident not only in explaining how these things impact on everyday internet use, but perhaps more importantly, how we might all take a wee bit more control of our online lives.

An additional issue faces the public sector, despite its commitment to digital transformation. The sector is heavily involved in the support of newcomers to Canada, and frontline staff at federal and provincial levels are ideally placed to offer digital skills support to people most in need. Public sector staff are often, thankfully, protected by Union membership, and Unions appropriately challenge changes to job

descriptions and employer expectations, such as tagging on elements of digital work to existing roles.

While the nonprofit sector might often lead the way in terms of agility and responsiveness, this is often at the expense of staff burnout, as they over-commit in their determination to do more with stretched funding. Unions (obviously and brilliantly!) play a vital role in securing pay and future security, which the non-profit sector also should look to, ensuring that workers are paid fairly for the work that they do. This positive consideration of the worker's rights also impacts on staff ability to deliver digital champion support.

Unions were on board with digital champion work early doors in Scotland, and [Mhor Collective](#) worked with the brilliant [Scottish Union Learning](#) in the years before the pandemic to deliver train-the-trainer digital champion modules for Union Learning Representatives so that digital training and support could be meaningfully embedded in the workplace, offering opportunities for all. We supported this programme with responsive learning, to help union members feel confident internet users in their own lives, offering interactive sessions on everything from digital mindfulness, to supporting children and families online and even all the way to preparing for a digital retirement: all at an inclusive, open-to-all level. Workers aren't just workers - first and foremost, they're people, with active, important personal lives. Support them here, digitally, and they'll be keen to learn more, and then might be willing to have the sharing of digital skills added into their job description (if they're paid for this added work, of course!).”

Data Management and Analytics

1. Data governance - Are organizations using data to help get more funding or service people more and have better reach?
 - a. What data to collect? What is meaningful data?
 - b. Consistency of data
 - c. Data retention
 - d. Capacity to collect and analyze
2. Capacity and funding for data and data analytics and data management
 - a. Capacity building of workers and even frontline staff to be able to use the data. What does that mean for their day to day?
 - b. To get funding, a lot of times, we're hearing that some additional data analysis is happening, and great integrations on data are happening on the side of people's desks.
3. Data quality and accuracy continues to be important, regardless of in person or digital.

- a. How can we reimagine data quality? Especially if we're adding AI components? How are we betting that the data is right?
 - b. Creating consistency and data through KPI framework. Creating frameworks that focus on outcomes, but are also differentiated for various segments of groups? For instance, if I'm saying 70% satisfaction rate, we have to be specific. What does that mean, a specific service or completion rate? When I'm serving various groups of people, various skill levels, for instance, or online versus in person, for instance, things like that? How can I create that by creating consistency?
4. Data skill training - digital literacy of various skill levels around data and getting training
 - a. for the workforce for managers, managers, who did a lot of work frontline, understand that understand immigrant integration very well, are now being asked to understand digital are asked to participate in digital transformation initiatives. How do they use data in such a way that then helps them manage, effectively.
5. Data visualization and usage of data
 - a. Thinking about the next 25 years, we're thinking that we need funding, and an alliance and a budget line item from funders around data visualization.
 - b. It's not enough anymore to get a paper report, or shared online by how I can use dashboards to democratize our understanding of data. So frontline staff and others can be able to look at the data and know, through an infographic very quickly what they need to be doing to meet needs and address gaps.

Keeping the conversation going!

We could have kept talking together for hours.

And, so, we will! A few of us spoke after the session and we're going to create a 1 or 2 day virtual conference or a series of virtual sessions where we can really spend the time we need. Going deeply into each scenario. Building a collective sector voice to advocate to government and sector leadership.

The sector knows what it needs. We even have some of the solutions. Let's collaborate, learn, and share together!

If you're interested in being notified when we're ready for the next steps, contact me:

Marco Campana

marco@marcopolis.org

Appendix 1: Possible group scenarios to discuss

These are the initial scenarios provided to the group as suggested topics for small group discussions:

You serve Newcomers. Here are several pressing issues facing how you provide service. focused on digital transformation, hybrid service delivery, digital inclusion, the future of service delivery, new and emerging technology. Choose from the scenarios below, or create a new one, and respond to the questions below.

Scenario: Digital Maturity and Transformation

Immigration will be experiencing rapid growth, with an increasing number of clients needing services. Understanding organisational and individual digital literacy (and from that maturity) is a requirement BEFORE any transformation. Existing systems for managing client records are becoming cumbersome and time-consuming, and staff members are struggling to keep up with the demand for services. Discuss how you can transform the organization's processes by digitizing client records, adopting a case management system, and introducing other digital tools and technologies to streamline operations and improve service delivery.

Scenario: Hybrid Service Delivery

The COVID-19 pandemic has highlighted the need for hybrid service delivery models that combine in-person and remote services. Discuss how to provide services that are accessible to clients who may not have access to technology or who may be uncomfortable with remote services, while also offering the convenience and flexibility of remote services for clients who prefer them.

Scenario: Digital Inclusion

You are committed to serving all members of the community, including those who may be digitally excluded. Discuss strategies for improving digital inclusion, such as providing access to technology, offering digital literacy classes, and working with community partners to address barriers to digital inclusion.

Scenario: Future of Service Delivery

You are considering the future of service delivery, particularly in light of changing demographics and shifting community needs. Discuss how to anticipate and respond to these changes, such as by introducing new services or adapting existing services to better meet the needs of the community.

Scenario: The value of your website

What is the true aim of a website during hybrid or virtual service delivery? It is important to understand what a website is and why it's created. Discuss how websites can be the central point of developing, hosting and building hybrid services. For example, is the value of your or other websites to:

- **Attract and retain clients** that need our services?
- Is it to easily share **correct** information in a **timely** fashion?
- Is it for **internal use** so all staff members know what's happening in what department?
- Is it for engagement and collaboration?

Scenario: New and Emerging Technology

New and emerging technology is rapidly changing the landscape of service delivery. Discuss how to stay abreast of new developments, how to evaluate new technologies, and how to integrate them into the organization's operations. For example (because AI is all the rage right now):

- **AI powered virtual agents** and how do they assist a hybrid or completely digital service delivery. Depending on industry needs, and project partners involved, the use of artificial intelligence that runs on client histories (aggregated and anonymized) can be used to create more advanced agents that can help clients with more complex cases. Based on what parts of the process are easily replicated as part of a digital workflow, discuss how virtual agents can be used to prepare information to fill into the larger admin systems (OCMS for example), create new files, review resumes, understand history, discover family needs, or refer to mental health programs.
- Other ideas can be found in the article [Tech we're not talking about in our sector](#).

Scenario: Digital Security and Privacy

You increasingly rely on digital tools and technologies. It is important to ensure that client data is secure and privacy is maintained. Discuss how to ensure that the organization's digital tools and systems are secure and how to protect client data from breaches or unauthorized access.

Scenario: Data Management and Analytics

You collect extensive data on clients and their needs. It is important to have effective data management and analytics tools to analyze and utilize this data. Discuss how to collect and manage data effectively, how to use data analytics to improve service delivery, and how to ensure that data is used ethically and responsibly.

Scenario: Stakeholder Engagement

To ensure that you are meeting the needs of Newcomers and stakeholders, it is important to engage with them regularly and solicit feedback. Discuss how to engage with stakeholders effectively, how to use feedback to improve service delivery, and how to communicate with stakeholders about the organization's operations and impact.

Scenario: Collaboration and Partnerships

You cannot achieve your goals alone, and collaboration and partnerships are key to success. Discuss how to identify potential partners, how to cultivate relationships with partners, and how to leverage partnerships to improve service delivery and reach more clients. An example:

- **Partnering up with startups.** Innovation is the bread and butter of startups and a lot of them are looking to solve problems and find their product market fit.
 - How can we **partner better with up and coming technology companies to innovate or use “innovate as a service” models?**
 - Can we be their **trial cases for technologies (win-win) where they provide free (or close to free) applications and we benefit from results?**
 - What does **sustainability** look like here? **Do we always need government funding?**

Scenario: Sustainability and Resilience

To ensure that you can continue to provide services to Newcomers in the long term, it is important to be sustainable and resilient. Discuss how to build a sustainable funding model, how to manage resources effectively, and how to plan for and respond to emergencies or crises that may impact service delivery.

Appendix 2: Scenario Discussion Guide

Re-used from [Integrated Advocacy - Paths Forward for Digital Civil Society \(2020\)](#)

On your own: For the scenario you selected, spend five minutes reviewing and identifying potential issues or challenges. What potential issues or complications do you see? Rank them in order of importance.

1. _____
2. _____
3. _____
4. _____
5. _____

5 minutes

As a group: Spend 10 minutes sharing your top five identified issues/complications and discussing the similarities and differences between what you each identified and why.

10 minutes

As a group: Spend the next five minutes and list five issues/considerations you've identified together as the most important to consider.

1. _____
2. _____
3. _____
4. _____
5. _____

5 minutes

On your own: Spend three minutes and answer the questions below.

As a group: After you've written your individual answers, spend seven minutes discussing your answers as a group.

1. Was anything surprising, or unexpectedly illuminating, about this group conversation? If so, what?

2. Was anything helpful about this group conversation? If so, what?

3. Was anything challenging about this conversation? If so, what?

Readout: Select a representative to report back to the larger group

- Report back the 5 issues that the group considered most important
- Report back how the initial considerations identified by the members were similar or different
- Report back if group members found anything surprising, helpful, or challenging about this conversation.