

## DMSI Survey Data

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The survey numbers are inconsistent in a number of places, indicating either a flaw with survey methodology or that some survey respondents skipped large areas of the survey, or stopped earlier in the survey. For example, although 332 continued the survey after an initial respondent drop-off from 443 who answered the first question, only 258 indicated their province, which was a required field at the end of the survey.

## High level statistics:

- 443 started survey and were asked a number of initial questions about their use of digital messaging
- After all 443 answered the initial survey consent question, there appears to have been a drop-off of 111 respondents who chose not to continue with the survey. It's unknown why this occurred, but we should consider n=332 for the initial section of the survey.
- When asked to indicate if they use digital messaging with clients, 212 answered yes, 120 answered no. Those who answered no were taken to a shorter survey asking a few questions (outlined below).
- The remaining 212 that indicated they were using digital messaging were asked to identify as front-line workers or management. 208 identified themselves:
  - 109 (52.40%) identified as front-line workers
  - 99 (47.60%) identified as management
- 96.51% (249) of those who answered the question "Do you receive IRCC funding?" indicated that they are IRCC funded.

## Agency demographics:

## Provincial breakdown of survey respondents:

Ontario	44.19%	114
Saskatchewan	21.71%	56
Manitoba	10.85%	28
British Columbia	9.69%	25
Alberta	6.59%	17
New Brunswick	3.88%	10
Prince Edward Island	1.94%	5
Nova Scotia	0.78%	2
Northwest Territories	0.39%	1
Newfoundland and Labrador	0.00%	0
Nunavut	0.00%	0
Quebec	0.00%	0
Yukon	0.00%	0
<b>TOTAL</b>		<b>258</b>

## Agency staff size:

1-5 employees	5.98%	15
6-10 employees	12.35%	31
11-20 employees	10.76%	27
21-50 employees	25.10%	63
more than 51 employees	45.82%	115
<b>TOTAL</b>		<b>251</b>

The question about number of clients served was not clear about individual program or entire agency. Some respondents indicated their own case load while others indicated the entire agency. Thus this question is not valuable for comparison or to evaluate agency capacity when comparing staff size VS number of clients served.

## Digital messaging

### Initial analysis

Are clients asking you to communicate with them using digital messaging?

▼ Yes	66.27%	220
▼ No	28.01%	93
▼ I don't know	5.72%	19
<b>TOTAL</b>		<b>332</b>

## % of Agencies using digital messaging to serve clients

Respondents who continued were asked whether they are currently using digital messaging with clients:

ANSWER CHOICES	RESPONSES	
▼ Yes	63.86%	212
▼ No	36.14%	120
<b>TOTAL</b>		<b>332</b>

- 212 indicated they were using digital messaging with clients
  - 208 continued the survey and were directed to questions based on their organizational role
    - 109 (52.40%) identified as front-line workers
    - 99 (47.60%) identified as management
  
- 120 indicated they were not using digital messaging with clients and were redirected to specific questions in another part of the survey
  - Of these 105 answered the question: Are you or your agency interested in learning how to use digital messaging to serve clients?  
79 (75.24%) indicated yes

## Main reason of utilisation of Digital Messaging with clients / benefits of using digital messaging

How do you think digital messaging is useful for your clients? Choose all that apply.

▼ It makes us more accessible to them if they can't come into our offices	79.22%	263
▼ It is a tool/app that clients already use and are familiar with	75.60%	251
▼ It is a fast way to get information and referrals	71.69%	238
▼ It saves travel time for them	62.35%	207
▼ It is more effective to use the method clients have asked us to use	40.06%	133
▼ Clients see us as innovative and focused on their needs and communication preferences	32.53%	108
▼ Clients can share confidential information on secure channels	21.39%	71
▼ Other (please specify)	<a href="#">Responses</a> 20.48%	68
<b>Total Respondents: 332</b>		

We asked a few questions about what contact information agencies collect about their clients. 89.97% of those who answered indicated they collect cell phone numbers. 71.99% ask clients how they prefer to be communicated with.

Main reason of non utilisation of Digital Messaging with clients / %  
not using that wish to use digital messaging / how those who wish  
to use it plan to use digital messaging to serve clients

# Digital messaging tools and components using to serve clients

## Digital messaging tools - front-line workers

▼ Texting/SMS/MMS		65.96%	62
▼ WhatsApp		55.32%	52
▼ Facebook Messenger		39.36%	37
▼ WeChat		17.02%	16
▼ Other (please specify)	Responses	13.83%	13
▼ iMessage		12.77%	12
▼ Skype		11.70%	11
▼ Viber		10.64%	10
▼ Instagram		7.45%	7
▼ SnapChat		4.26%	4
▼ Signal		2.13%	2
▼ QQ		1.06%	1
▼ Line		1.06%	1
▼ Google Hangouts		1.06%	1
▼ Telegram		0.00%	0
▼ KakaoTalk		0.00%	0
▼ Google Allo		0.00%	0
▼ Blackberry Messenger (BBM)		0.00%	0
<b>Total Respondents: 94</b>			

Other responses did not include digital messaging tools.

## Components used to serve clients - front-line worker

▼ text		94.68%	89
▼ document sharing		59.57%	56
▼ image sharing		46.81%	44
▼ audio messaging		37.23%	35
▼ group messaging		34.04%	32
▼ live audio/calling		26.60%	25
▼ video messaging		7.45%	7
▼ live video streaming		6.38%	6
▼ Other (please specify)	Responses	5.32%	5
<b>Total Respondents: 94</b>			

## Digital messaging tools - management

▼ Texting/SMS/MMS		85.71%	66
▼ WhatsApp		71.43%	55
▼ Facebook Messenger		66.23%	51
▼ Skype		28.57%	22
▼ Instagram		27.27%	21
▼ iMessage		22.08%	17
▼ Google Hangouts		14.29%	11
▼ WeChat		12.99%	10
▼ Other (please specify)	Responses	12.99%	10
▼ Viber		9.09%	7
▼ SnapChat		7.79%	6
▼ Line		1.30%	1
▼ QQ		0.00%	0
▼ Telegram		0.00%	0
▼ KakaoTalk		0.00%	0
▼ Google Allo		0.00%	0
▼ Blackberry Messenger (BBM)		0.00%	0
▼ Signal		0.00%	0
<b>Total Respondents: 77</b>			

Other responses included Google Duo (2) Apptoto (1), Twitter (1), imo (1).

## Components used to serve clients - management

▼ text		94.81%	73
▼ group messaging		53.25%	41
▼ live audio/calling		37.66%	29
▼ image sharing		37.66%	29
▼ document sharing		37.66%	29
▼ audio messaging		27.27%	21
▼ video messaging		18.18%	14
▼ live video streaming		11.69%	9
▼ Other (please specify)	Responses	3.90%	3
<b>Total Respondents: 77</b>			

## % of Agencies that receive a request from clients to use Digital Messaging to communicate with them

66.27% of agencies indicate that clients are asking them to communicate using digital messaging.

▼ Yes	66.27%	220
▼ No	28.01%	93
▼ I don't know	5.72%	19
<b>TOTAL</b>		<b>332</b>

## % of Agencies which ask clients about communication preferences

▼ Yes	71.99%	239
▼ No	22.89%	76
▼ I don't know	5.12%	17
<b>TOTAL</b>		<b>332</b>

We probed to find out when in the service process they ask clients

▼ At intake	75.27%	207
▼ During needs assessment	49.45%	136
▼ Informally, once a client relationship has been established and the newcomer is accessing services	40.00%	110
▼ When clients ask us to use specific technology to communicate with them	26.91%	74
▼ During client surveys	11.27%	31
▼ Other (please specify)	<a href="#">Responses</a> 6.18%	17
<b>Total Respondents: 275</b>		

Additional responses included:

- at every event they sign in and include their best method of contact they want us to use
- In the Care for Newcomer Children program we ask when the parent registers if they have a home number, cell number or email we can use to communicate with them.
- Job Search Workshop
- Visit to our website and they use the on-line form to contact us
- On arrival at hotel room orientation. Usually they ask how to communicate with us
- When we start a new Conversation Circle

We also asked what they information they collect at intake:

▼ Cell phone	89.97%	296
▼ Email	89.06%	293
▼ Home phone	76.60%	252
▼ Emergency contact phone number	45.59%	150
▼ Work phone	24.92%	82
▼ Digital messaging (such as WhatsApp, Viber, FB Messenger, etc.)	21.88%	72
▼ SMS/text	20.67%	68
▼ Other (please specify)	<a href="#">Responses</a> 5.17%	17
<b>Total Respondents: 329</b>		

While it appears that communications preferences are being asked about, it also seems that digital messaging and Texting are not asked about frequently.

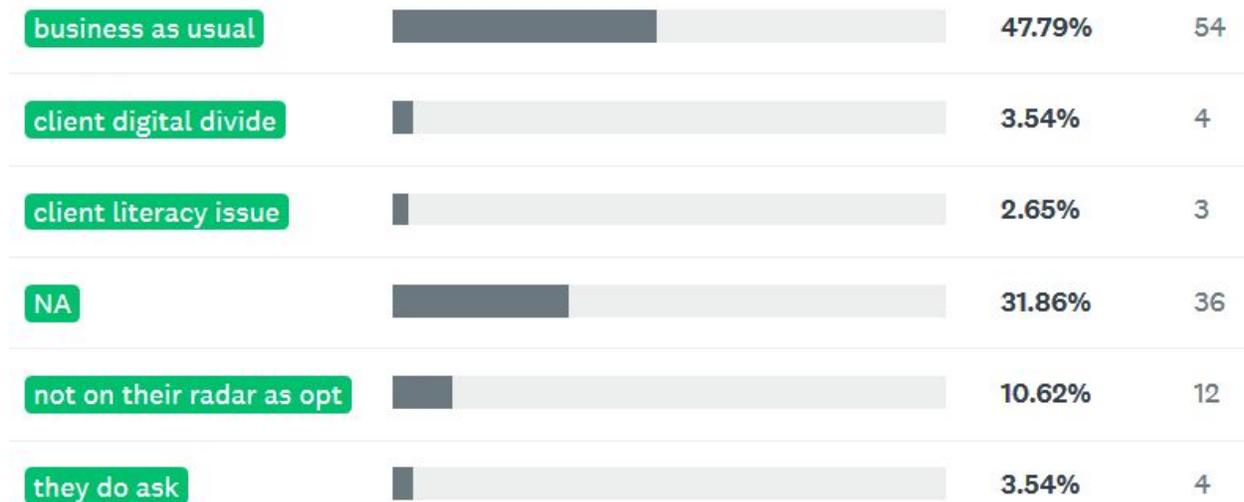
## Main reason agency has not taken into account the request of clients

We asked those who do not ask clients this question “why do you not ask them their communication preference?” Some highlights of 113 responses:

- non relevant to the way we manage clients.
- communication preferences are usually the methods determined/used by the case worker. e.g. case workers prefers using email.
- Never thought of it. I only text some of them if , months after intake, they at some point indicate texting is preferable.
- I do personally but our office is still not at that stage.
- Our settlement staff don't have capacity to use anything other than telephone (voice) or email.
- We are a very busy office that runs several different programs; we therefore do not have the time to initially communicate with our clients using different methods. We always send out an email, followed by a phone call. Once the client has responded to our initial method of contact, we continue communication with them either in person, by phone or email.
- We have always required their email address as well as a number they can be reached at along with an alternate number so never thought to ask what other forms they would prefer
- Because we are mainly able to provide service via traditional methods phone and email
- We do not have the capacity at this point to communicate differently.
- Because have to ensure that our communication maintains the privacy of the clients but also staff (eg not all staff have work cell phones and cannot use their personal cell phones to contact clients). At this moment, the traditional methods ensures privacy
- They are told we will communicate with them via email or phone.
- have not seen a need, most of our work traditionally has been face to face

- No one in management has demonstrated this to us. I do not have the ability to use anything but phone, email, and MailChimp to contact people. We do emphasize that most communication comes from MailChimp, and get their authorization to contact them that way.
- All of our contact information is printed on the info card or can be found online at our website that client can choose whichever way they feel convenient and easy to contact us. Most clients know their preference and don't need to be asked specifically.
- Because our clients are english-as-a-second-language speakers it is very difficult for them to both understand us, or express themselves via phone. Therefore, we generally stick to written communication first.
- By default, we reach out to applicants by email. If they have questions, they can reach out to us by email or phone
- WE ONLY CONTACT BY PHONE AND EMAIL
- Interpretation of language. Differences between verbal versus written language may lead to miscommunication.
- I am usually able to notice what they prefer based on their situation.
- I usually invite them to provide any contact information. We don't request or ask for specific method.
- We have always done business that way. In person or phone visits
- it just hadn't occurred to me!
- We let them know that we will contact them by phone.

I tagged the 113 responses, grouping them into common themes:



*Business as usual* refers to responses that indicate this is just how they've always collected information. *Not on their radar* responses indicates the agency appears to have considered digital messaging but is not interested in asking clients this question. A large number of respondents indicated *Not Applicable*. It's unclear what they mean by this.

# Analysis of how widespread digital messaging use is in the organization

Clients being served using digital messaging (all clients or specific categories)

## Clients being served - front-line

▼ Clients who ask us to communicate with them using digital messaging	70.21%	66
▼ Clients who indicate a preference to communicate using digital messaging when we ask them	46.81%	44
▼ Clients in a specific language group	29.79%	28
▼ All clients	25.53%	24
▼ Clients with a common country of origin	13.83%	13
▼ Other (please specify)	<a href="#">Responses</a> 13.83%	13
▼ Newcomers who are not yet registered clients, in Canada	10.64%	10
▼ Newcomers who are not yet registered clients, outside of Canada	9.57%	9
<b>Total Respondents: 94</b>		

Additional responses included:

- clients who are not able to be reached any other way
- audio messaging works great with illiterate clients who dont know how to read and write
- Clients that take the initiative to find us on social media
- useful when there is a language barrier
- Translation apps are also used when there is a language barrier
- Students (clients) that need to be contacted/communicated with consistently whenever there is a need to pass a quick information

## Clients being served - managers

▼ Clients who ask us to communicate with them using digital messaging	72.73%	56
▼ Clients who indicate a preference to communicate using digital messaging when we ask them	57.14%	44
▼ Clients in a specific language group	32.47%	25
▼ Other (please specify)	<a href="#">Responses</a> 20.78%	16
▼ Clients with a common country of origin	14.29%	11
▼ All clients	12.99%	10
▼ Newcomers who are not yet registered clients, in Canada	12.99%	10
▼ Newcomers who are not yet registered clients, outside of Canada	12.99%	10
<b>Total Respondents: 77</b>		

Additional responses included:

- illiterate clients requesting voice messaging
- We do not use regularly, but when clients would prefer this method we will. But mainly they prefer email.
- In our program, the instructor and client would mutually agree on using the digital messaging tool.
- Youth, almost exclusively
- when all else fails or when easier to reach clients
- Clients who have been identified as needing additional or crisis services
- Clients who have booked appointments with us
- as an alternate contact if we cannot reach them by phone or email, we will text or find other methods
- Vulnerable clients who live in remote and vulnerable communities.
- it varies depending on need of client. most of our contact is face to face. digital messaging is used to fill in the gaps. we are in a rural community so it is easier to come to receive services directly.

## Most common ways digital messaging is being used

Front-line workers and managers were asked to rank how digital messaging is being used. Both agreed on this ranking:

1. Send messages back and forth with individual clients (2-way communication)
2. Send individual information messages to clients (broadcast-style)
3. Send messages to groups of clients (broadcast-style)
4. Create groups for discussion with and among clients in a common program, or on specific topics

## How did you decide to use digital messaging with clients?

Front-line workers

▼ Our clients started asking to communicate via digital messaging	61.70%	58
▼ We ask clients about their communication preferences and noticed a trend in clients using digital messaging	47.87%	45
▼ We responded to a trend in new groups of immigrants/refugees who were using digital messaging	43.62%	41
▼ It just happened	35.11%	33
▼ New staff suggested we use digital messaging to serve clients	11.70%	11
▼ Other (please specify)	<a href="#">Responses</a> 6.38%	6
<b>Total Respondents: 94</b>		

Other responses included:

- Clients were worried about the cost of cellphone calls and asked us to use whatsapp

- Some clients were unable to access support via phone/email and digital messaging became the only option.
- I saw clients facilitating contact with overseas family members using whatsapp regularly during meetings, and decided it would be helpful to have a group whatsapp message to receive information from client and overseas family member in one place.
- wanted to be exhaustive with the options offered to clients in order to communicate with program
- It is one of the mandates of our program, it is the only way we can communicate with clients
- It's very convenient in my work since i need to be in constant communication with students coordinating their sessions with teachers, scheduling and rescheduling. It's a lot wasier to sent messages on time rather than calling. it's also efficient since Text messages are usually free and clients are able to respond at their suitable time.

## Managers

▼ We noticed a trend in new groups of immigrants/refugees who were using digital messaging	53.25%	41
▼ We ask clients about their communication preferences and noticed a trend in clients using digital messaging	44.16%	34
▼ It just happened	35.06%	27
▼ Our clients told their workers that they wanted to communicate via digital messaging	33.77%	26
▼ New staff suggested we use digital messaging to serve clients	18.18%	14
▼ Other (please specify)	<a href="#">Responses</a> 15.58%	12
<b>Total Respondents: 77</b>		

## Other responses included:

- The youth do not get back to via a telephone message but do so if send by text
- only way to contact them. they have no data but can access wif-fi
- It has become a normal way of operating in our programs
- This was the easiest way to communicate with our clients. Especially for sharing important documents via pictures on whatsapp
- use it in partnership with other organizations
- forced upon
- It is the only option we have for clients in remote areas we serve that we are under funded to provide serves to. However, this can only be done with support from a local community person who can support our clients otherwise it would not be possible for the majority of our clients where English is their second or third language or where they lack literacy skills as well.
- programs are run out of communities and this was how they are working.
- We have tech savvy staff
- Syrians are used to working with WhatsApp.
- Clients just started messaging me via Facebook and texting

# Which staff use digital messaging

## Front-line

▼ Everyone can use digital messaging, it's available to all staff	40.43%	38
▼ Only some staff/teams use digital messaging	40.43%	38
▼ Digital messaging is done informally by some staff using their own accounts/devices	39.36%	37
▼ Mobile and itinerant staff, like CSS, Settlement Workers in Schools use digital messaging with clients	23.40%	22
▼ Some individual staff who have made a case with their supervisor/manager use digital messaging	7.45%	7
▼ Other (please specify)	<a href="#">Responses</a> 7.45%	7
<b>Total Respondents: 94</b>		

## Other responses included:

- we are not given work phones, so we are told, if we do not want to give out our personal phone numbers to our clients, we can give them our office extension, meaning we can't text them or use WhatsApp with them, meaning we pretty much can't do our job, so almost all staff feel forced to give clients our personal numbers...
- staff that have work cell phones
- Digital messaging is available for all staff, but it is the nature of the service/program that suggests the best way of communication
- only staff who have work cell phones
- I use texting on request of students who have that ability.
- Usually the staff with Cell Phone facility (workphone access) would use the Digital Messaging with clients owing to privacy issues

## Managers

▼ Only some staff/teams use digital messaging	50.65%	39
▼ Everyone can use digital messaging, it's available to all staff	29.87%	23
▼ Digital messaging is done informally by some staff using their own accounts/devices	28.57%	22
▼ Mobile and itinerant staff, like CSS, Settlement Workers in Schools use digital messaging with clients	24.68%	19
▼ Other (please specify)	<a href="#">Responses</a> 16.88%	13
▼ Some individual staff who have made a case with their supervisor/manager use digital messaging	15.58%	12
<b>Total Respondents: 77</b>		

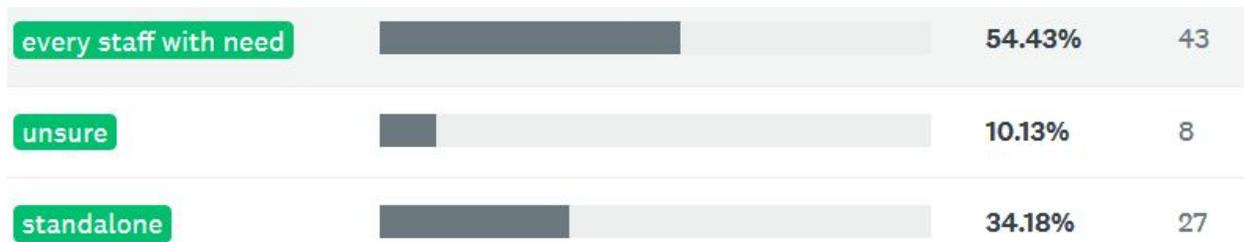
## Other responses included:

- mostly itinerant staff to clients who do what's ap or text
- Our instructors are not required to use digital messaging but we don't discourage its use. We provide training and support to those that want to use it with their language learning clients.

- some individual staff use texting when requested by clients
- It has not been implemented formally, some workers have just come up with the best way of communicating with clients. It is more common for the youth team.
- We don't have the funds to pay for staff cell phones, so they use their own
- Most staff use digital messaging; however, they use their own phones which is not ideal. It would be good to have enough funding to provide devices to all staff.
- We use digital messaging in all of our programs (settlement, LINC, employment) with the exception of LIPS.
- I cannot speak for the whole organization, but within the Youth initiative, the majority of groups utilize digital messaging

## Digital messaging integrated with all staff or role of a single staff member

### Front-line workers



### Management



# Analysis of Agencies capacity

% of Agencies which make an evaluation of their communication method with clients

Do you evaluate the effectiveness of your communication with clients (as an organization or as individual staff)?

ANSWER CHOICES	RESPONSES	
Yes	63.50%	207
No	36.50%	119
<b>TOTAL</b>		<b>326</b>

63.50% (207) said yes, 36.50% (119) said no.

For those who answered yes, 173 (77.58%) indicated *Anecdotally and informally (eg. in conversation with clients)* (Aside: while 207 said yes, 223 answered this follow-up question)

ANSWER CHOICES	RESPONSES	
Anecdotally and informally (eg. in conversation with clients)	77.58%	173
We incorporate questions about communication into client surveys	30.04%	67
All staff are expected to ask clients to complete anonymous client satisfaction surveys	24.66%	55
Other (please specify)	<a href="#">Responses</a> 13.90%	31
<b>Total Respondents: 223</b>		

## Main reason why Agencies don't do any evaluation of the communication method

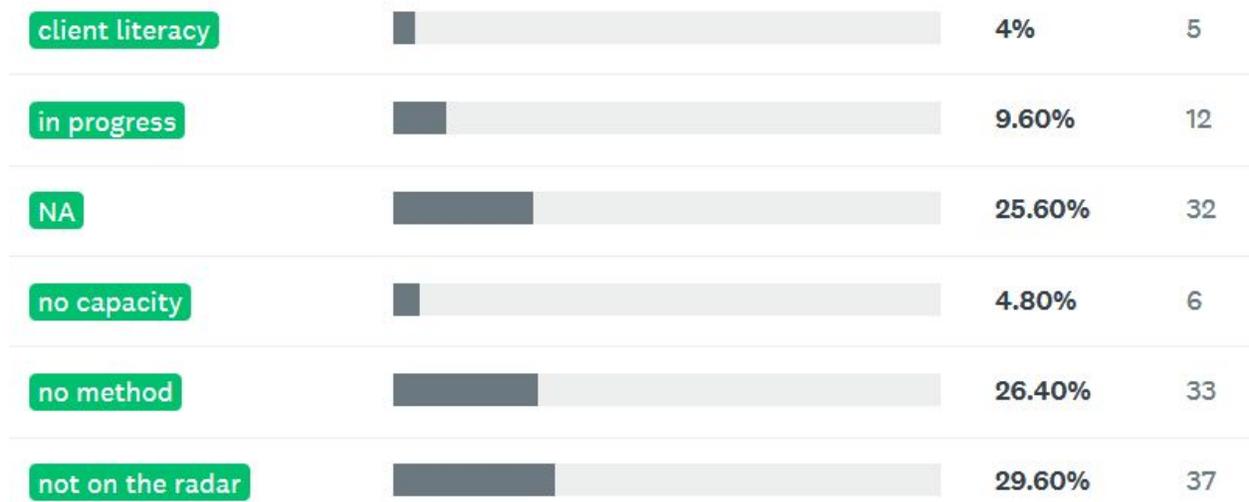
We also asked those who answered no, why they don't evaluate the effectiveness of their communication with clients (as an organization or as individual staff). 125 responses were provided (aside: again, that is more than initially answered no - 117 vs 125). Within these answers, some who initially indicated they do not evaluate communication effectiveness indicated that they do it informally, or that they are working on a process. Some comments:

- Our customer service is not that advanced or consistent
- It has never been suggested or recommended
- It is not part of our task to evaluate effectiveness of communication.
- Staff over loaded with multiple tasks. The communication should be agency wide and we do not have that human resource
- I think, It would be a great idea to start and work on. We are in working progress.

- Our customer service is not that advanced or consistent
- We do not do a formal evaluation. However, if we notice that our methods of communication are not effective, we adjust them.
- because we don't have agency cell phones for settlement workers, and they use personal phones if they use apps
- It is not formally evaluated but we hear anecdotally from staff
- The information shared with them is straightforward.
- The clients I serve can be located any where in the world and many communicate in their mother tongue. We did an on-line survey and had only 3 people responded.
- We have not thought of this yet, no particular reason. Maybe we should start doing this.
- We see them daily, so tend to communicate in person.
- we evaluate overall satisfaction, but not specifically satisfaction regarding communication
- No official or structured evaluation. Many of our immigrant seniors cannot read a survey- either on paper or on a screen- and some are illiterate in their native languages.
- We haven't have any issues nor feedback doing it the way we are doing it.
- Clients are surveyed to death... it is hard enough to get them to do a basic survey. The type of communication is established in the relationship and follows those lines that make sense. Texting is only open to wrap around clients.
- We evaluate our learners progress in English language acquisition and progress. No one has ever complained about communication. Our learners know what they know mostly by word of mouth. Unless you are going to communicate using text in their first language, we feel it is a lot of output for very little increase in service. I guess this would work for those programs that are more short term service, such as settlement agencies etc who don't see their clients as often or regularly as language programs.
- no capacity, no training to conduct meaningful evaluation, has not been required of us, simply no additional time or resources in the day to do so. If it were mandated, maybe. For now, if external bodies could conduct this, would be better.
- Surveys are most effective if we do something with the results; that is, using data analysis to make incremental changes to the way we do business. Surveys for survey's sake is a waste of everyone's time. With the administrative overload within a school board environment, we often have little time to perform even routine tasks.
- the work is very relationship based, so we trust that if something isn't working for participants they will let us know. If someone isn't responding or communicating further, mentors or leaders will engage individual directly to find out why (usually there are reasons far beyond what method of communication is being used).
- Clients typically accept forms of communication that I suggest, they are also relieved to be using text message or WhatsApp for communication. After the initial negotiation about what to use for communication, we usually settle on their preference and don't review it.
- Same as above - lack of capacity, resources, training and time. People don't know when or how to ask, and are focused on providing the service. I usually ask them if it's working

well for them during the process in case I need to change methods of communicating, like calling.

I tagged the 125 responses, grouping them into common themes:



More than 50% simply indicated Not Applicable or that their organization hasn't implemented or thought about it. Almost 30% don't see the need, indicating it's not on their radar as a priority.

# Analysis of Agencies capacity

## Materials and equipment

### Access to materials/ work vs personal resource use

#### Front-line

▼ We use work smartphones	65.96%	62
▼ We use work accounts	56.38%	53
▼ We use our own personal accounts (eg. cell number, Facebook account)	35.11%	33
▼ We use our own personal device (eg. Smartphone, tablet)	31.91%	30
▼ Some teams share one or more phones among staff	9.57%	9
▼ The agency is aware some staff use their own devices and provides a monthly stipend to staff who use their own devices	9.57%	9
▼ Other (please specify)	<a href="#">Responses</a> 4.26%	4
<b>Total Respondents: 94</b>		

#### Other:

- it is intrusive, it is not restful as in the evenings/on vacation/sick time and weekends, clients are messaging us, resulting in us never having a break from work. we need work phones.
- Facebook (work account only), Cellphone (personal number), Whatsapp (personal number)
- We dont need to use smart phones we have a work phone and emails do the same thing as digital messages
- some atff don't mind using their personal phones to text clients

#### Management

▼ They use work accounts	55.84%	43
▼ They use work smartphones	50.65%	39
▼ They use their personal device (eg. Smartphone, tablet)	45.45%	35
▼ They use our their personal accounts (eg. Cell number, Facebook account)	33.77%	26
▼ The agency is aware some staff use their own devices and provides a monthly stipend to staff who use their own devices	31.17%	24
▼ Other (please specify)	<a href="#">Responses</a> 12.99%	10
▼ Some teams share one or more phones among staff	11.69%	9
<b>Total Respondents: 77</b>		

Other:

- We restrict use of personal phones/accounts
- Staff are not pleased with using their personal cell phone due to concerns with boundaries
- We have a cell phone for digital messaging for purpose only to send information to a group of clients
- only one staff is given a smartphone to use - all others use their own devices
- We do not allow the use of personal devices as this could be a breach of our confidentiality as the devices record and save clients personal info.
- our main digital messaging occurs through our Facebook account.

## Why personal devices are used.

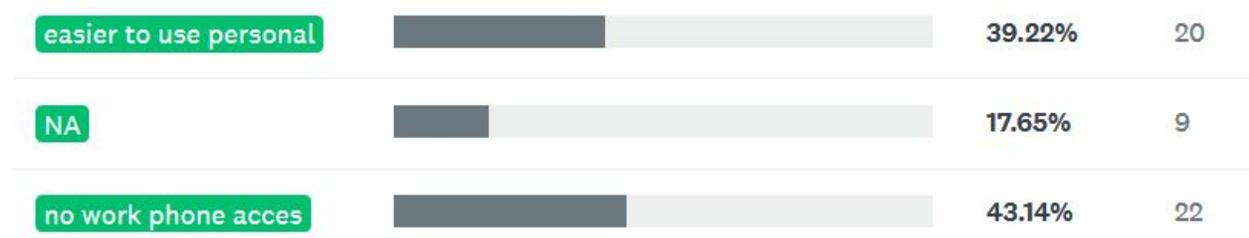
Front-line workers

Responses:

- Our agency doesn't provide smartphone, so we have to use our own phones with our own accounts
- I work for two programs. One where digital messaging is well established and another where we are still in a pilot phase. In this pilot phase program, staff have been using their personal devices/accounts to communicate with clients. We are expecting to have work devices very soon as the pilot program has process very successful and more effective in service delivery.
- Since my phone is always on me it's easier to communicate with the clients any time. I feel more connected when I have a conversation through digital devices. This way, I know I'm not only working but I'm also helping someone at all times even after work hours. That's what I'm passionate about. It's just so different compare to sending emails.
- I mostly use my work device, but I don't always have it with me, and I use my personal device outside designated times to schedule appointments or follow up with select clients who may need to contact me outside office hours.
- This varies according to who is serving the client. Staff members with little interaction with clients will use their own personal devices.
- It is a must as we are a mobile case management program
- The agency will not provide employment devices. It becomes eventful that clients obtain our personal numbers and accounts in order to connect with them outside of the agency or to complete the workload within a timely manner.
- It's more flexible. and won't have any extra cost of the organization
- It is more convenient than carrying around an extra device.
- I do not have a choice. I do not have a device other than my own.
- Employer has never provided us with work phones, despite staff bringing this up with management numerous times.

- I prefer not to carry two smart phones.
- Our agency doesn't provide smartphone, so we have to use our own phones with our own accounts

Responses were grouped into the following categories:



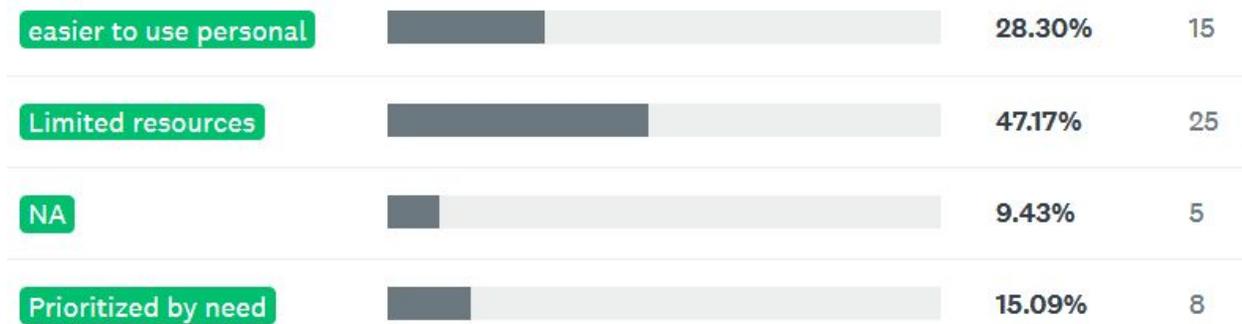
## Management

Responses:

- Our organization has only one work smart phone used by one program with multiple participants. Other staff use their own phones and accounts since we do not have a budget to provide them with phones.
- Their choice. We pay a stipend for 4 staff only, the ones using their devices to communicate with clients regularly. Staff are not expected to use their device if we don't contribute to the cost.
- personal preference, when we don't have budget for business unit
- We do not have funding to provide everyone with a smartphone.
- personal devices are subsidized. Cheaper cost. Not ideal, as it causes boundary issues, but this was what was available to us at one time and has not changed.
- Financial restraints and staff preference
- We don't have the financial resources to pay for all staff cell phones, but it is a need and a good tool, we can provide a form for taxes to expense their cell phone bills off their T4 if they chose to
- The agency does not provide a phone only a cell phone allowance. This \$40 a month helps however staff are receiving calls after work hours. They are told not to answer however struggle when they know a client needs help.
- Staff are provided a stipend to use their own phones - the agency has some work phones but staff have a choice to use their own or a work phone.
- It occurs very rarely and messages are deleted once communicated. Agency is exploring providing work phones for those that use them.
- Our staff work remotely and as a condition of employment must follow specific policies/guidelines to use their personal devices for work purposes. This helps save costs related to purchasing, distributing and supporting hardware and software.

- Some people prefer to use a personal laptop rather than a work laptop. Some people prefer to use their personal cell phone as a work phone so that they do not have to carry around two phones
- Staff should not be using their personal devices and if they are doing so, they are doing it without the organization being aware of it
- It is only occasionally that we do and not on a daily basis, it seems to be when they cannot communicate through a phone call or email.
- We can't afford one for all staff. Don't ask staff to use it, but sometimes the only way to contact clients. Some places poor cell reception
- We currently provide monthly cell allowances but are adopting work phones for all for confidentiality and privacy issues.
- They use their own smartphone as it is easier than having an organization-owned phone.
- Only certain positions receive a device. Frontline staff in certain programs, for example newcomer youth, find that this group communicates more on social media.

Responses were grouped into the following categories:



# Main challenges face using digital messaging to serve clients (Staff)

## Front-line workers

▼ Boundary issues (eg. clients messaging after hours)	68.48%	63
▼ Managing expectations (eg. client expects to be answered within short time after messaging)	65.22%	60
▼ No agency policies, protocols or guidelines in place	41.30%	38
▼ Don't have work devices or accounts, have to use personal devices and accounts	41.30%	38
▼ Language barriers with clients	36.96%	34
▼ Not enough data for our phones	32.61%	30
▼ Other (please specify)	<a href="#">Responses</a> 9.78%	9
<b>Total Respondents: 92</b>		

### Other responses:

- only because we do not have work phones. if we did have work phones, i would just turn my phone off after hours and would not have to deal with this issue
- Boundaries are set early on as I inform clients I do not rely to their messages after hours. Managing expectations (I let clients know when I am in the office/working so that they understand my messages will only be answered during this time)
- Language barriers can sometimes be an issue, but translation apps are becoming more and more easy to use, and with great accuracy.
- Proper communication is done face to face. Digital Messages miss tone, fluctuation of voice, body language, and statistically if your not standing in front of someone your not really paying attention to them. Nothing replaces a face to face conversation
- It's harder to end the relationship

## Management

▼ Boundary issues (eg. Clients messaging after hours)	68.00%	51
▼ Expectations of immediate communication (eg. Client expects to be answered within short time after messaging)	61.33%	46
▼ Don't have work devices or accounts, have to use personal devices and accounts	48.00%	36
▼ Language barriers with clients	38.67%	29
▼ No agency policies, protocols or guidelines in place	34.67%	26
▼ Not enough data for their phones	32.00%	24
▼ Other (please specify)	<a href="#">Responses</a> 13.33%	10
<b>Total Respondents: 75</b>		

### Other responses:

- For the use of texting mobile phones are expensive and not everyone can have one. If accounts are used it's a lot to maintain them to ensure client confidentiality.
- Lack of information/guidelines as to what can be shared/communicated using digital messaging and what cannot.
- staff comfort in using technology as a way to augment in-person services
- Staff not interested in or knowledgeable about using digital messaging.
- We do not encourage use of personal phones for conversations with clients but if clients request we can do that for minimal information.
- lack of education on how to
- what is critical is that policies are put in place, and then followed and paid for, before we worry about whether or not it works best for clients... is it reasonable to expect settlement workers to have more means of communication to monitor?
- some staff are not tech savvy and have difficulty using these technologies.
- not enough funding to keep separate accounts and get proper equipment.
- In short, neither party has sufficient technological literacy. We have a case of, "technology is the answer, what is the question? approach. You have no cost effectiveness if neither of the parties is able to use the technology effectively and then efficiently.

Overall, the trend in these answers points to issues related to policies and protocols around digital messaging use, in particular related to client-staff boundaries and the instantaneous nature/expectation of responses which is common to the medium. It is interesting to note that a lack of agency policies, protocols or guidelines is of higher concern to front-line workers than management.

## Main challenges face using digital messaging to serve clients (Resources)

### Front-line workers

▼ We don't have funding for smartphones and data for all staff who need it	50.00%	38
▼ Some staff use personal devices and accounts to use digital messaging to serve clients	44.74%	34
▼ Although funding covers smartphones and data, our staff typically do not have enough data each month	25.00%	19
▼ We want to use digital messaging to serve clients, but do not have access to smartphones and data	23.68%	18
▼ Other (please specify)	<a href="#">Responses</a> 18.42%	14
▼ Some staff positions/programs are funded to use smartphones and have data	17.11%	13
▼ We have used other budget resources to provide staff or programs with access to smartphones and data	15.79%	12
▼ Making the case to our funding program officer for smartphones and data for staff was difficult	14.47%	11
▼ Making the case to our funding program officer for smartphones and data for staff was easy	11.84%	9
<b>Total Respondents: 76</b>		

Other responses included:

- It is not clear if we can or can't use data for this purpose so we use our personal data plans
- Use of personal smartphone for messaging which leads to after hours messages that are difficult to ignore.
- Dated devices that just not user friendly
- I pay for my own phone and data plan and use it as I need; there is no way my employer would pay or subsidize costs for cell phones.
- Digital messaging to serve clients is not the most effective way to speak to clients, Digital messaging is actually more problematic than solution based

## Management

▼ We don't have funding for smartphones and data for all staff who need it	71.23%	52
▼ Some staff use personal devices and accounts to use digital messaging to serve clients	42.47%	31
▼ Some staff positions/programs are funded to use smartphones and have data	28.77%	21
▼ We want to use digital messaging to serve clients, but do not have access to smartphones and data	26.03%	19
▼ We have used other budget resources to provide staff or programs with access to smartphones and data	17.81%	13
▼ Other (please specify)	Responses	17.81% 13
▼ Although funding covers smartphones and data, our staff typically do not have enough data each month	12.33%	9
▼ Making the case to our funding program officer for smartphones and data for staff was easy	10.96%	8
▼ Making the case to our funding program officer for smartphones and data for staff was difficult	8.22%	6
<b>Total Respondents: 73</b>		

Other responses included:

- I do not know if we have requested funding to cover this. It would certainly make a difference for some of our staff who do not have much data coverage per month on their personal plans. Additionally, we would like to begin using WhatsApp and WeChat as they are popular with our Arabic-speaking and Chinese-speaking clients however most staff do not want to give out their personal cell numbers, therefore, one smartphone per team to be used for this purpose might solve that issue.
- We haven't yet made the case for phones and data, but we hope to in the CFP 2019
- where has it been shown in a study to be beneficial for STAFF and for clients to do this?
- For policy and practical purposes, we limit it only to crisis clients. How do you compensate staff after hours and the demand for instant service is not an expectation we can serve for the majority of clients.
- It is a general budget item...cost. Also there is no resource to design effective communication programs and standard approaches
- Due to other priorities such as rent increase, next fiscal year we will be forced to abandon digital communication unless properly funded

- We do not have an effective model that first to assess technological literacy and then identify a training and support path to get this training done right in a timely way in order to capitalize on the advantages of technology in service delivery. Again too many assumptions about what is already in place - technological literacy and infrastructure like support people on site and good internet service, enough finances to purchase this on the client side.

Themes were fairly common between front-line workers and managers when it comes to resources. Front-line workers are more concerned with having adequate data for their phones. It is interesting to note that both front-line workers and management answered the two questions about funding officers, indicating, almost evenly that it was both difficult and easy to make the case for smartphones and data at their agency. This suggests a potential inconsistency of funding officer recognition of smartphones and digital messaging as acceptable service tools.

## Benefits you see in using digital messaging to serve your clients

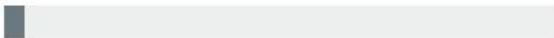
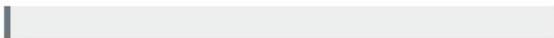
### Front-line workers

Open ended question, responses:

- it is useful: as we can use google translate, and then send a message to a client in their language, which we can't always do when we call them. for them to send us their pay stubs/any other pictures of mail/bills so we don't have to make a trip to them audio recordings if family is illiterate in their own language inviting to group events by copying and pasting an invite/picture of a poster and sending it to clients we truly could not do our job without this
- able to get messages to them even when they are unable to answer the phone. Also, communication with clients who are not available to communicate during the day we can text back and forth without playing "phone tag"
- In some cases this is the only means of communication with clients
- It allows us to text important information so that the recipient can re-read and better understand what we are saying. We can resolve issues quicker as well.
- very useful as phone calls require higher level English Skills. Clients messages can be translated on Google Translate before sending to me
- client chooses to communicate using this form because they are in classes or busy with life. They can also review the messages and use them to answer questions in the future.
- Timely communication from 1st day, specially with newcomers who don't have phone servivice yet. Location sharing. Broadcasting announcements. Polls
- It's a flexible way to provide service to the clients if they have transportation challenges and couldn't come to the office to meet us; and
- encrypt messaging so it is safe to send images and documents. Clients who don't speak moderate English or French can communicate using google translator/ easier to read and understand than to talk in a second language

- It is useful because it help me to understand clients needs better and provide them with better services.
- it is fast and useful more than e mail or phone calls
- We receive questions more quickly than through our traditional customer service channels.
- It helps communicate with clients (especially those who do not speak English)faster and is a very effective means of communication
- Clients are familiar with the apps, they can respond when available, they have time to translate the messages they share and receive
- Easier to get information to my clients and gather information from them
- It allows me to check in on them after a service has been provided. Clients most often contact me for information on a variety of subjects. Digital messaging allows me to pass on my own knowledge as well as to provide links to Websites with the appropriate information, scans and photos (when necessary). I can also copy and paste applicable information from Websites.
- It provides an additional layer of contact ability and support
- It keeps me connected to clients at all times and gives them reassurance that they can connect with me in the way that they are most comfortable.
- I am able to access my clients according to their preferences (save time on travel from meeting face to face)
- It is extremely useful as it helps me reach clients who are isolated and vulnerable. Some clients are not comfortable leaving their home and participating in activities. Through digital messaging I develop trust with the clients and many of them choose to participate in settlement programs. I am also able to serve clients who are not able to communicate with email and by phone (for a variety of reasons). It also allows me to outreach to clients and tell them about upcoming programs and activities (particularly if they don't use email/phone)
- (A) Clients who do not have regular access to telephone, internet. (B) Clients who can understand written English for relay of short messages (i.e. set up an appointment) but who do not do well with telephone communication in English, where brief interpretation services are not readily available. (3) Interviewing overseas family members. (4) Group conversations between client and overseas family member for family reunification matters.
- It is the primary way of connecting with clients. Without Digital messaging, I would not have the opportunity to connect with most clients.
- It is a very fast and efficient way to communicate with clients, see when they are online and to share documents/images. Email can be cumbersome and awkward to access, but various communication apps make international communication very easy and cost effective.
- If the client have any sort of question, they can simply send me a text or phone call instead of driving all the way across town. We would also video call if they want to show me a specific document they might not understand and I can explain it to them. digital messaging has made everything easier and faster for me in my program.

- It allows me to create more regular and informal communication with clients, so that they feel I am approachable and reachable. It undercuts some of the language barrier for communication with clients who are still learning the language and have difficulty with voice phone calls. Text messages and voice recordings can be re-read, played back, and responded to at the client's own pace, allowing for more language processing time. I honestly find digital messaging to be incredibly useful for these reasons.
- Instant sharing of information and communicating, confirming appointments, informing during emergency situations about any changes in schedules, sharing pictures of issues faced by users which can be addressed properly.
- it helped us a lot helping us about informing them with the appointments and some times they send us some of the letters to be translated and some information

more effective		47.62%	40
more efficient		47.62%	40
na		3.57%	3
prefer face-to-face		1.19%	1

## Management

Open ended question, responses:

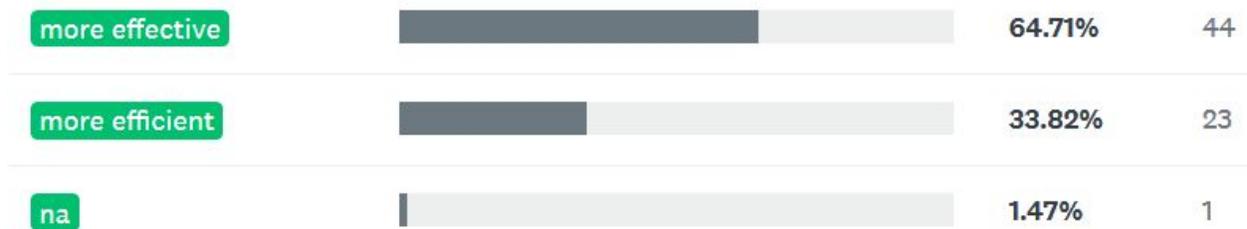
- efficient, fast interactions; sometimes useful for a quick reminder or check in
- instant. easy. personalized. no language barrier
- very few clients use email. our client data increases when we use digital messaging vs phone calls or emails
- Quick turnaround, easily accessible, groups chats help with the settlement process.
- It's direct and convenient for clients. Emails can get lost in full inboxes, voicemails can get missed or ignored, but digital messaging is more direct communication to clients.
- The staff is able to communicate quickly with the clients; it makes our services more accessible to the clients and removes barriers around transportation and system navigation.
- \* to be able to contact clients who prefer using digital messaging \* able to contact clients with limited English language skills \* clients who only have access to free wi-fi or do not have a local phone number yet
- Can ensure that factual information is shared in first language to large groups of newcomers, increase accessibility and participation of special events, job fairs, etc. Saves time for clients who can access services without travelling long distances.

- It allows for immediate communication off-hours, as most staff do not check work email at home unless necessary. In the case of our team, it helps to facilitate volunteerism amongst our clients as they feel they have instant support when leading an activity after-hours or off-site.
- We find that they respond immediately to text messages. We send them emails first but there are usually so many excuses for not receiving or replying. But when it's text, the reply is immediate.
- Staff find it easier to communicate with clients when there is a language barrier. Staff also find that it is a good tool to use to remind clients of appointments since a lot of them are not comfortable using email.
- Trying to reach clients can be a challenge and if the client prefers digital messaging, then it's a useful way to reach that particular client.
- We can reach more clients through digital messaging and provide services to more clients at the same time.
- Timely communication, last minute details, support with accessing services, quick response time, group messaging
- clients may only have access to digital messaging but not have the ability to talk on their phone. This gives staff the ability to communicate where they would not have been able to unless face to face.
- Clients use WhatsApp and connect to wifi and send staff pictures of mail and other things they need support with.
- Extremely useful in providing a more convenient and effective way for communication in addition to the fact that this style of communication supports the whole "Digital Literacy" platform. It is very disappointing that IRCC will not support the expenditure of smart phones to use with LINC students as part of their literacy training and ongoing communication styles.
- For non-English speakers it is a venue that allows them to use digital translators and for our pre-arrival clients we are able to communicate with them without cost
- Digital Messaging often times speeds up communication from clients. It also helps staff become more accessible to clients who otherwise can't travel at all times.
- Very useful. We have to serve our clients in the way they prefer.
- Clients are more responsive to Text messaging than emails and phone messages.
- it is a low-cost mode for clients to be reached. WhatsApp etc allows for large cohort messaging/organizing and polling
- As I said earlier, the clients we serve in our 22 different communities would not all be able to receive services due to cost, infrastructure and geographical constraints.
- It works particularly well with Syrians who don't have good English skills and often cannot read Arabic. It enables them to speak rather than relying on text only.
- Language is an issue that makes digital messaging necessary. The clients communicate with us using their phones for translation, for document interpretation, for notification of programs in their own language. We sometimes translate the flyer into the language and send to clients so they can access some program. It makes serving the client more

personalized and also the client doesn't have to be in our office for every little thing. Some of the clients don't have home phones either.

- it's another tool in the toolbox.
- It is the preferred way of communication for most of our clients so it is meeting their need. It is also the most effective and direct way for our clients to reach our staff members when the clients are not in the building.

Management comments also focused on the effectiveness and efficiencies digital messaging afforded workers and clients, with a stronger emphasis on how digital messaging as a tool for their staff to serve clients improved staff effectiveness:



Overall, the message is clear from front-line workers and managers, digital messaging is an effective, efficient, and client-centric service delivery tool. For some, it is now essential and the primary way they communicate with and serve their clients.

These comments and themes are further supported in front-line and manager responses to the question:

## Rank the following benefits your staff see in using digital messaging to serve clients (1 being strongest benefit)

### Front-line workers

1. More efficient way to provide quick information & referral to clients
2. Clients can easily and quickly ask a question
3. Saves time for client travel
4. Clients indicate satisfaction communicating this way
5. Works well with clients who have literacy challenges (including in their first language)
6. Saves time for staff travel

### Management

1. More efficient way to provide quick information & referral to clients
2. Clients can easily and quickly ask a question
3. Clients indicate satisfaction communicating this way

4. Works well with clients with literacy challenges (including in client's first language)
5. Saves time for client travel
6. Saves time for staff travel

## % of Agency measured or evaluated the impact of using digital messaging to serve clients

### Front-line workers

83.33% of front-line workers said yes. Comments indicate that, for some, the evaluation is more informal than formal.

### Management

80.26% of management said yes. Comments suggest that measuring or evaluating has not been thought of, or their use of digital messaging is too recent to evaluate. When done, comments suggest the evaluation is informal.

## % of Agency which have policies, protocols, or guidelines in place to specifically use digital messaging to serve clients

### Front-line workers

▼ Yes	28.57%	26
▼ No	36.26%	33
▼ I don't know	35.16%	32
<b>TOTAL</b>		<b>91</b>

### Management

▼ Yes	36.00%	27
▼ No	50.67%	38
▼ I don't know	13.33%	10
<b>TOTAL</b>		<b>75</b>

## % of agencies that have consulted with staff about use of digital messaging

### digital messaging to serve clients

#### Front-line workers

▼ Yes	17.78%	16
▼ No	57.78%	52
▼ I don't know	24.44%	22
<b>TOTAL</b>		<b>90</b>

#### Management

▼ Yes	55.26%	42
▼ No	44.74%	34
<b>TOTAL</b>		<b>76</b>

We asked management why they did or did not consult with or survey their staff about digital messaging. Some responses:

Yes:

- to get a sense of usage (frequency, # of clients)
- We did the survey and are working on policies, protocols, or guidelines.
- we have talked about it during some staff meetings
- We have limited the question to CSS staff only
- To ensure the safe and effective use of digital messaging and technology.
- To ensure only that staff only captures the information that is relayed if it relates to the program and is factual.
- We use digital technology to serve clients in the health program, using various media such as text messages, e-mails and video conferencing etc. The digital health is funded and supported through Ministry of Health. The staff in the settlement program have shared that more and more clients prefer the use of technology to serve them. Our current strategic plan also emphasizes on the use of technology in client service delivery; however, lack of resources within settlement has restricted this use.
- To see how effective it is
- Because we are setting up guidelines right now and need to gather information.
- We regularly review communication tools and use to ensure that clients are receiving prompt service and that we document all interventions ,including the use and means of communications tools
- Yes. Presently and moving forward, we feel that we are moving headlong into providing services via technology but we have negated to take a more methodical approach to

offering services via technological means. Internally we use a basic program planning model to accomplish this. Step1 Assess the needs Step 2. Generate solutions Step 3. Develop Implementation Plan Step 4. Develop Evaluation Plan Step 5. Quarterly/Semi-annual/Annual review of program. We are committed to making technology part of the potential solution, but we feel the need to be conscientious about setting staff and clients up to be successful early on and not rushing to the end otherwise we risk growing individual, organizational and community capacity.

- 

No:

- This is new and only used as needed. We may do surveys in the future as we see this to be a valuable tool.
- Time
- Started a conversation, but have not completed a survey or full consultation
- not funded for
- It needs to be addressed within federal guidelines concurrently
- we don't ask staff to use own phones
- Informally asked staff on their usage
- Again: time and prioritizing
- Informally to ask if they prefer this method of communication, most do
- there was no urgent need to do so.
- We just never thought about it. As ED though, I often check phone bills to see the activity of staff, and I call their attention should I find something out of the ordinary.
- I can see why it should be done, but each staff member who needs to communicate with a client will choose whatever method works for them: phone call, visit, email, text, etc... and they are not asked to explain or communicate how they do it
- 

## % of Front-line workers that declared they have the skills to use digital messaging to serve clients

▼ Yes	90.11%	82
▼ No	3.30%	3
▼ I don't know	6.59%	6
<b>TOTAL</b>		<b>91</b>

Front-line workers are very confident in their skills to use digital messaging.

Comments included:

- It is simple, most of us use personally. New features can be learned quickly
- I am good at using Wechat as a tool to provide information and answer the client's questions. I have the knowledge and skills to use this app and other smartphone functions.
- the team internally has guidelines on how to use it-protecting privacy, setting limits,

- I have used digital messaging for most of my adult life. All the platforms are user friendly. The only problem I would face is getting a new device (a new phone) and learning how to use it.
- Because I am a frontline settlement worker and I'm confident that I'm able to communicate with digital messaging and also ensure the client's confidentiality
- We know the basics, but there are some we don't know.
- I am able to keep boundaries and maintain confidentiality
- I do have concerns about boundary and confidentiality. I prefer to have a policy to support the method.
- Readily transferable skill.
- Yes. Skills required: Understanding of digital messaging etiquette; Consistent use of phone during work hours; Ability to establish standard guidelines for communication (if management not involved); Ability to exercise good judgement where messaging is not appropriate - i.e. where matter is more substantive, where interpretation necessary to avoid confusion, where an urgent response is required
- Yes, but I don't feel this is a need. Clients need to come into a building to meet other people and understand communication is not just digital messaging based. Language and communication is deeply rooted in body language.
- I live in the millennial generation who uses their phone to do everything. I capture moments with my phone for pictures and/or videos of events and is able to forward them right away to an email upload them to social media accounts to promote events or services. I know all communications applications (apps) out there where I can talk to my clients at any time instead of sitting at a desk waiting for someone to reply to my email (if they check it). If I need to send an email, I can also do that through my own personal device whenever I have too. What I'm trying to say is that you can do EVERYTHING on your phone WHENEVER you want ANYWHERE you want, instead of sitting at a desk.
- I am a very techno- savvy person and prefer to have timely communication with clients in my current role coordinating the Online language training program
- Need better training to ensure confidentiality, better training on setting boundaries and expectations at the beginning, need to know how to deal with conflict over messaging if it arises
- 

## % of managers that declared they have the skills to manage staff using digital messaging to serve clients

▼ Yes	46.67%	35
▼ No	24.00%	18
▼ I don't know	29.33%	22
<b>TOTAL</b>		<b>75</b>

Managers are much less confident in their ability to manage increasingly using digital messaging to serve clients and want additional supports in place, including policies and protocols.

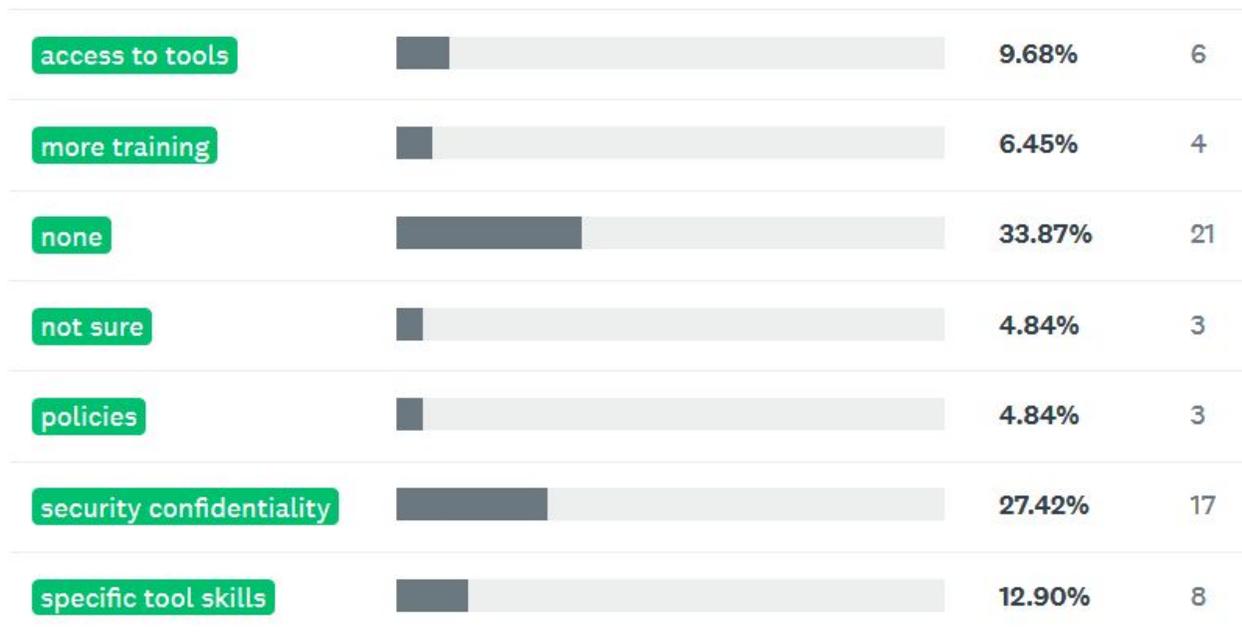
Comments included:

- Hard to manage with so many options and every client may want to use a different tool/app so there needs to be some way of limiting how clients can contact staff so we can develop guidelines and best practices
- training on boundaries needs to be in place
- If there are resources and guidelines in place and appropriate training provided for the same (at both staff and management's level); I would be in a better position to manage staff's use of digital messaging to serve clients.
- We have mature staff that are very trainable. We prefer staff don't use own phone, but at last resort sometime have to in order to contact client
- Yes, If it was in place on a regular basis. Otherwise I generally ask staff not to use their own personal digital messaging unless it is necessary.
- - yes but need policy in place in order to ensure client confidentiality is protected, boundaries are maintained
- I think we would benefit with having an IT communication specialized to help us develop our vision tied into expansion of on line service delivery
- I would need to know what skills are necessary and I don't have that information yet.
- Myself, I am not very social media savvy, nor do I use it much in my personal life. I would appreciate training, and also I would appreciate knowing what our sister settlement agencies do.
- Training on this would be beneficial
- Maybe, a sample guideline would help.
- Digital messaging is just one of many digital tools used in the program.
- I would love to learn more about it.
- We have enough technical proficiency at front line and management levels to understand what is needed
- I don't know the platforms myself
- The staff are adults, they only require a general policy no need to micromanage it
- It's never been done so I would need to learn how other agencies do it.
- Don't feel tech confident myself, not sure where to start these discussions
- Where are the studies? Where is the IRCC new line item? Where is it shown to be reasonable for clients to have this expectation? Where are existing policies?
- It's about securing of information, confidentiality, boundaries, and managing risk. Yes, we feel we have the skills to manage this use.
- I could use regular training on social media's use and tech as it changes always and so fast.
- I try my best! but I would love more training on how to better support staff!
- As I've mentioned, it's evolved without us thinking deeply about it.

- it is a complaints-based process.
- by reviewing the reports of staff and through regular staff meetings as well as the review of clients survey. Also keeping the metrics of digital usage, time and date reports.
- Boundary issues are difficult to address.
- I need more help to understand how we can set up everyone. Setting guidelines, and protocols is needed. Monitoring guidelines are needed before I can feel I have the skills to manage my staff in use of digital messaging and devices from work.
- I have a Masters Degree in Distance Education and previously worked as a private consultant supporting the offering of academic and literacy programs for first nations in western Canada.
- Our staff are trained comprehensively on relationships, boundaries & professional and ethical conduct. With this training, proper supervision and our policies and procedures I am confident there are no issues.
- May need to learn more about appropriate legislation if it exists.
- maybe some help in policy and protocols
- By knowing the number of clients they serve language specific or English they can collect the information when maintaining record of service to clients on how the service has been provided in person or voice or text

## What resources or training do you need to use digital messaging effectively to serve clients?

### Front-line workers



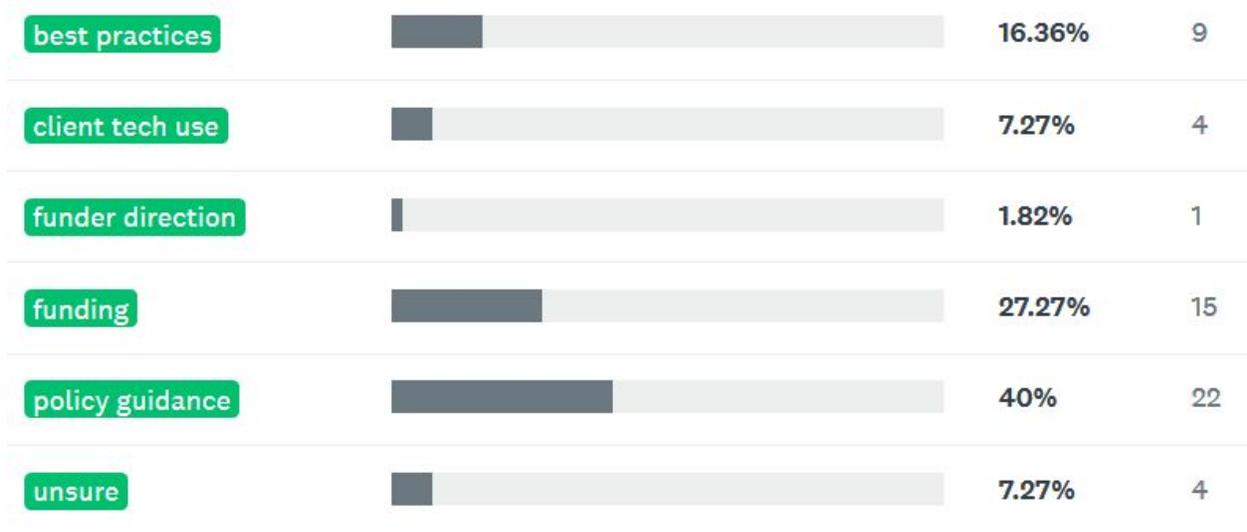
A diverse set of answers. Although the highest response was “no training needed”, it is worth noting that second most popular was training on security, confidentiality and boundaries.

## What resources or training do you and your staff need to use digital messaging effectively to serve clients?

Managers

Managers

We asked Managers “What do you need to know to build your agency’s capacity to offer digital messaging services to newcomer clients?”



We also asked Managers two additional questions about funder support:

Do you think have the support of your funder in terms of:

▼ Resources (including smartphones and data) and capacity to offer and use digital messaging to serve clients effectively		43.08%	28
▼ Other (please specify)	Responses	36.92%	24
▼ Local program officer support		33.85%	22
▼ Professional development of staff to use digital messaging to serve clients		27.69%	18
▼ Promising practices to review		27.69%	18
▼ Clarification of expectations about how digital messaging will be used and managed		24.62%	16
▼ Professional development of management to manage use of digital messaging to serve clients		23.08%	15
▼ Clarification of legitimacy of technology in service delivery		20.00%	13
<b>Total Respondents: 65</b>			

#### Other responses included:

- we need more dialogue about all of this
- We have not had any discussion around any of these matters.
- The funder seems interested in pilots and exploration but cost is always an issue and I don't believe the funder adequately supports the cost of maintaining technology, including the agency's IT infrastructure.
- No it is not clear as to expectations around use of digital
- We currently have no support despite bringing the issue up multiple times. The quick answer we receive from IRCC is we will have to wait until the end of the fiscal year to see if there is any slippage. We went through this last fiscal year to be told there would be surplus funds only to be told a week later there were no funds available.
- All are needed, not sure if we have their support.
- Support for this has to come from core funding and that is the issue.....funding doesn't cover all of the cost and many dont or cant cover core funding
- There seems to be a genuine willingness of the funder to engage in a meaningful dialogue/exercise for developing this area of practice - this is a huge ideological shift from "you can't serve everyone" to we have vulnerable people in vulnerable communities who could/should be receiving services regardless of where they live." I am truly excited by this development!
- We don't have a funder that is on board this. We never applied for funding for these resources. These are the last thing on our mind when applying for grants. We are applying for grants to cover operating budget and programs mostly.

How have you applied for funding support to use digital messaging to serve clients?

	Responses	35.94%	23
▼ Other (please specify)			
▼ We successfully built it into funder proposals and budgets		34.38%	22
▼ Ad hoc conversations with our Program Officers to ensure that digital messaging use is acceptable to serve clients and to re-allocate budget resources		25.00%	16
▼ We resource digital messaging in other ways/funds		25.00%	16
▼ We unsuccessfully requested into IRCC proposals and budgets		15.63%	10
<b>Total Respondents: 64</b>			

Other responses included:

- Our only inter-play with IRCC staff was when a complaint from a rival agency complained about our staff's use of whatsapp. It was painted as a negative practice and we disagreed that whatsapp was a great way to pass on good information rather than uninformed speculation on services and settlement outcomes
- Will be proposing funding for the next budget negotiation. Currently using funds from our social Enterprise.
- we haven't applied for funding specifically for that
- We were able to obtain some start up funds - non IRCC funding
- We asked funder in other program directly, not IRCC
- haven't applied for any funding to support this, there are other needs that are greater, and being that the initiative is community based, community members are happy to continue to communicate in ways that they are already communicating with each other