

# DMSI interview and focus group themes

## Table of Contents

<b>DMSI interview and focus group themes</b>	<b>1</b>
<b>Methods</b>	<b>1</b>
<b>Main messages that overlap with the literature review:</b>	<b>2</b>
<b>Results</b>	<b>3</b>
<b>Emerging themes:</b>	<b>3</b>
Agencies are using digital messaging	3
Digital messaging has created increased client access and service efficiencies	4
Staff are driving the use of digital messaging to serve clients. Management capacity is still in its infancy.	4
Policies, protocols, guidelines and processes are important, but inconsistent	6
There is a general consensus that agencies would like to share and learn from each other	6
Digital messaging can be a “game changer” when it comes to serving clients, including increasing access, efficiencies and effectiveness	7
Funders are waiting for the sector to indicate the efficiencies, effectiveness of using digital messaging to serve clients, including empirical evidence	8

## Methods

Phone interviews were conducted with 28 people in 24 interviews (some agencies had multiple representatives in an interview).

Interviewees represented a variety of Settlement sector agencies, from mid-sized to large, urban and rural, front-line workers and management, from cities across the country (Fredericton, Halifax, Thunder Bay, Ottawa, Toronto, Calgary, Vancouver). Representatives also included academics (2), government representatives (2 federal, one provincial) and civic tech sector representatives (2).

Two in-person focus groups were run in Toronto, one with 15 front-line workers, and one with 3 managers.

The goal of these interviews and focus groups was to collect their input on their direct experiences using instant/digital messaging to serve clients, as well as to identify existing sector research and trends in technology-mediated service delivery. This input also served to help refine questions and focus for the national survey.

Below are the standard questions interviewees were asked, focusing on their specific experience with instant/digital messaging and technology use to serve clients. Focus groups followed a similar format. In each case, discussion and follow-up questions were included, providing additional local context:

- What are you doing in digital service provision (and other technology to support service delivery) with newcomers to Canada?
- Are you using digital messaging in daily service delivery (such as text/SMS/MMS, or messaging apps like WhatsApp, Viber, FB Messenger, etc.)?
- How has technology in your agency's work impacted or been impacted by human resource capacity (for example, skills and capacity at the front line and management levels) and organizationally (for example, training, orientation, policies, protocols, guidelines, etc.)?
- What have you learned about integrating technology into service delivery that others could benefit from, including challenges, best practices, and opportunities you see in the sector?
- What are some of your technology concerns or pain points for client service delivery?
- How have you incorporated client research and input into the design and deployment of digital services?
- Is the notion of digital services separate from in-person services at your organization, or have you created a blended service approach where all Settlement Workers are expected to incorporate technology into their service provision?

Interviewees and focus group participants were also asked to provide their sense of what is happening across the sector, or in their city/region and beyond, in terms of instant/digital messaging and broader technology use:

- How widespread is digital messaging in settlement service delivery?
- Who is doing what in digital messaging, where and in what ways?
- What are some of the challenges, successes and opportunities?
- What are some of the other forms of digital tech emerging in this context?
- What are some promising digital service practices that you're aware of in the sector?

## **Main messages that overlap with the literature review:**

A number of main messages that emerged in the literature review also emerged in interviews and focus groups:

- Technology use is changing the nature of client relationships and offers opportunities to empower clients and enhance service integration. New technologies offer a different way for agencies to interact with clients, but also additional channels for clients to sidestep formal Settlement Services as they seek information on their migration and integration journey.
- A variety of technologies have been used in the Settlement Sector for decades. However, agencies still lack capacity to effectively integrate technology consistently across the organization – they're unsure how to implement, roll out and manage new and emerging ICT to serve clients.
- Settlement agencies and funders have been encouraged for years to collaborate to establish a framework to guide the development, use and evaluation of technology in service delivery. However, little has happened.
- The capacity of Settlement workers, agency management and funders to integrate the use of technology in the sector requires additional education, training, frameworks and support.
- Use of digital messaging (also known as instant messaging, or mobile instant messaging) has grown in use by both clients and front-line workers. Client use of digital messaging is driving this trend.
- There is a lack of standards, ethical guidelines and protocols guiding the use of digital messaging to serve clients in the Settlement sector. The sector needs ethical guidelines and frameworks for existing and emerging technologies used to serve clients. Much can be learned

and borrowed from other sectors that have developed guidelines, protocols and ethics for the use of technology to serve clients.

- Funders lack the capacity to evaluate, manage and monitor technology requests. Historically, technology is treated as a fringe issue, while it is becoming a core service competency and channel. Technology-mediated interactions are not generally considered direct service by funders.
- There are gaps in the evidence base underlying use of technology in Settlement services, especially regarding digital messaging. Much of the current use of technology to serve newcomer clients has not been evaluated.
- There is a large continuum of formal technology adoption in the sector, with pockets of innovation. However, the sector lacks effective knowledge sharing, such as promising practices around digital service delivery.
- Privacy, security and confidentiality have emerged as significant trends in the use of technology to serve clients, but agencies and funders are unprepared at the policy and practical levels to fully integrate these trends in agency use of technology for service delivery.
- Digital messaging should be considered an effective service tool in many areas of Settlement work. There is compelling evidence that serving clients using digital messaging, such as WhatsApp is promising and effective, both as a communication tool between Settlement professionals, and as a tool for providing settlement information to newcomers to Canada.

## Results

A number of themes emerged from interviews and focus groups that point to the use and utility of digital messaging in settlement service provision.

### Emerging themes:

#### *Agencies are using digital messaging*

All immigrant and refugee-serving sector organizations interviewed reported currently using or having experimented with digital messaging to serve clients. While they explore new and emerging technologies, such as digital messaging, they are grappling with how to effectively integrate it into daily client service work.

Those who have incorporated digital messaging into their service delivery channels and options for clients report increased access, efficiencies and effectiveness of service interventions.

Larger agencies tend to have the IT capacity to take technology projects on. As one interview put it: "Larger tend to have more capacity at technical level, but smaller agencies are excited, see potential, and can probably benefit the most, but don't have bandwidth for it." Challenges mentioned included encryption literacy, lack of official agency frameworks, lack of protocols/privacy policies that might not fit sector sensitivity around client privacy, etc.

WhatsApp is particularly in focus as "all Syrian clients preferred WhatsApp, or text messaging." Adopting WhatsApp has been effective to better engage and communicate with these clients. However, it is not the only app being used. Texting is particularly popular, as is iMessage. Agencies that are using digital messaging are following their clients' lead, using technology that they are using.

In some cases, all staff on a team or project are using digital messaging and smartphones. In others, it is one staff member, or a phone is shared among an entire team.

### ***Digital messaging has created increased client access and service efficiencies***

In order for digital messaging services to be successful, agencies have learned they need to meet client needs and use technologies their clients use. For example, agencies found that Syrian clients use WhatsApp, making this a logical starting point for digital messaging services. Have to recognize their needs, analyze what's of interest to them and how they want to access the service.

More than one interviewee mentioned how using smartphones and digital messaging affords staff more flexibility and ways to communicate with clients. One team that serves GARs has moved their primary communication tool with clients entirely to smartphones and WhatsApp. Voice messaging is one of the most helpful functions. Many of their clients are not literate in their own language, but they know how to use WhatsApp and can send voice messages: "This is the way we communicate. Voice messages can also be revisited and listened to when they need it. It saves time."

It's allowed them to do more work remotely with families. For clients with complex and high needs who need regular support caseworkers previously had to travel to their location to be able to provide that support. WhatsApp allows them to do more work remotely, providing more timely support. Even something as simple as reading daily mail has become easier for clients. Client gets mail, can take a picture and send it to their caseworker for translation or to read for them. Encryption features in WhatsApp mean clients can share sensitive information securely.

Clients are teaching workers how to translate messages using Google Translate. Using digital messaging, the channel of choice of their clients, and Google Translate, they've been able to keep the communication open.

Technology has facilitated access and bridges geographic barriers: "You can do the same things as you would in person. Says one service provider that has been using technology in their service delivery for many years, simply out of necessity: "You check a person's documents and compare them to the person you're serving online. You don't need to see them face-to-face to do a needs assessment. You can accompany them without being with them physically. If we can do this with folks around the world, why not in your own town?"

One agency piloted the use of a text chat box on the local municipal immigration portal. They averaged 150 conversations a week, from outside of Canada and from across the country. In-depth follow-up happens via email, but the initial personal online chat connection was crucial.

A front-line worker created an after-hours English learning WhatsApp group to help clients who were unable to come into their offices during regular service hours. Starting with six clients, the group grew to 80 participants. With scheduled real-time English sessions twice a week, the group also communicated and engaged in between sessions.

### ***Staff are driving the use of digital messaging to serve clients. Management capacity is still in its infancy.***

They had a conversation about it all. They were all itching to get on WhatsApp. It was her hesitation as a manager, unfamiliar with the platform, unsure about its safety that she continually said no to the

access. It was at a presentation where she saw how much better it was than some of the other ways they were communicating with clients. She then felt more comfortable giving access and permission to staff to use WhatsApp.

Conversations about technology use are fairly informal within agencies in most cases. They are not well documented.

Managers don't feel equipped to both make technology decisions and manage staff increasingly using technology to serve clients: "When I started to hear about all these different ways to communicate, I felt like a Luddite. How much do we rely on technology? What about people who are not necessarily up to speed on tech? But if we need it for our work, if it makes things more efficient, OK, but who's going to train me? And any staff who might need it?"

For some digital messaging has been a huge jump and change in the way they interact with clients. It has been difficult to figure out how to manage. At the same time, staff have embraced newer technologies: "It seems to make life a bit easier for staff. If you have a group WhatsApp of your caseload, you can send messages out to everyone is helpful and easier than connecting with each person individually." They are also grappling with boundary issues: "It's improved things in some ways, but in other ways, we have to help people understand that they can switch off their phones, don't have to be accessible 24/7 and that this is communicated to clients."

Agencies have identified digital divide issues with clients as well, they don't have money to afford internet connectivity. Hotspots, libraries, cafes, community agencies with wifi is where they connect. Most clients do get a cell phone plan, but it's basic because of the cost. What people need is focused on mobile devices and connectivity. No one has a home phone, which can be an issue in an emergency. Families may share a mobile phone, but the phone may go out of the house with the father/husband, leaving women and kids behind. Only able to reach one person in the family, messages may not be relayed, and confidentiality can be an issue.

Clients may have phones and may not have computers. Increasingly organizations put information online, or you need to sign up online, and it hasn't yet been made mobile friendly. There are gaps in agency capacity and government capacity (i.e. Online forms, etc.) and how clients are accessing information. And agencies don't feel they have the funding to keep up.

Informal service provision using WhatsApp does happen in some cases – but only with work provided smartphones, which are rare in the city. Agencies are still concerned with confidentiality and privacy issues. Workers may not be on the same page as their management in some cases, sometimes exceptions are made.

Boundaries are still an issue. Staff need to be flexible, staff take phones home and need some guidelines around that.

Managers are asking important questions about data privacy and access. The free nature of apps seems to good to be true. "How is WhatsApp free? It's encrypted, but who has access to the info?"

Front-line workers push technology use to management, who was unsure about it. It took time to make the pitch, workers need to be able to pitch in a way that is not intimidating, but also encourages managers and supervisors to look into their ideas. Making the case for smartphone use as a cost benefit, based on client outcome and accessibility is still something new to staff and managers, and agencies.

When staff approached her, one manager wondered “would it even 'count' when we reported to IRCC? IRCC is paying us to do what we're mandated to by them. I had to clarify with our Program Officer if it would count for service delivery. I was told that yes it would count. That's a dilemma. If you say no to staff, you're cramping their entrepreneurship and innovation. But we're ultimately responsible for what they do. We have to trust that they'll use the technology responsibly. Imposing structure after the fact can breed resentment. Organization structures were created for past times, things move more rapidly and change all the time now. We have to be flexible, and that's a challenge.”

What do managers say they need? Training. Agencies are increasingly hiring younger workers who are way ahead of managers in terms of technology use and comfort. It would be useful to have an orientation to the possible uses and the way different technologies work. A webinar where they could ask questions. A toolkit, resource or guide that outlines common areas of concern they should be paying attention to that she might not think about on her own. Those kinds of resources would be hugely beneficial, especially to convert managers who are not converted. Then they can see from a peer what the concerns they should and shouldn't have are.

### *Policies, protocols, guidelines and processes are important, but inconsistent*

All interviewees and focus group participants mentioned challenges around boundaries with clients as a result of using digital messaging. The biggest staff concerns are boundaries and protecting own privacy.

Building a blended service flow, where a client may interact with one channel such as WhatsApp and move to another, such as in-person is still something agencies are grappling with. But one manager likens online interactions to any other with clients: “You have to have staff ready and not thinking about the service as different from face-to-face. Would you spend all day with a client? Not likely. You have to schedule appointments in the same way you would in person. If a quick interaction moves into something deeper, you have to be able to let clients know an appointment is necessary, including online, likely through video. Time management is important. You cannot be a slave to the technology and instantaneous expectations. Workers have other appointments and priorities.”

Organizations tend to have policies around ethics, boundaries and practices around client interactions outside of work. In many cases policies extend to online work. Thinking of it as simply another service channel, all ethics, boundaries and protocols apply. However, some managers feel their basic policies are not as comprehensive as they should be to address online/digital services.

Agencies are looking at how they're using digital messaging more closely to see if they need more specific policies or additional protocols, guidelines and training. But managers don't feel they have the skills or resources to bring in some one to take a closer look.

Evaluation and measurement are also concerns: “There is great potential, but I'm not sure how to implement and train staff and develop guidelines and protocols suitable to making working with clients more effective. Is our service delivery enhanced by doing this? It's happening. Seems to be effective. But there's not evaluation or measurement. We haven't developed enough understanding around the use of technology and everything is moving so quickly and changing all the time, you feel out of control.”

*There is a general consensus that agencies would like to share and learn*

## *from each other*

Most good ideas stay with agencies and don't go further to be shared with the rest of the sector. Agencies, collectively, don't have the capacity to evaluate, analyze and share with the rest of the sector. Interviewees feel that the sector needs a pan-Canadian discussion on settlement and technology. It would be invaluable to create a convening space to learn from each other and to better understand where agencies are at and their approaches.

Agencies feel they can't ignore increased technology use in client services, but don't feel their funders are providing support to manage it. There are no guidelines, in terms of protocols around staff using technology. Every organization has their own take on it. But if one solution is more standardization across the country, it would be good to understand what is needed and what can improved services in terms of tech use. Front-line workers would like to have more helpful hints, sharing from others with experience, including promising practices, tips and knowledge sharing.

Smaller agencies in the sector's biggest fear is that a large agency will be funded to centralize online services to reach everyone and will displace local service providers. Regardless of how a newcomer is initially served, they feel some clients will eventually need in-person support from a local service provider.

Academics caution about creating “best practices” so they're not just vanity projects. Best practices need rigour. However, sites like Cities of Migration are a great example of how good ideas or promising practices can be identified and shared.

What can be replicated in different contexts? This is an important question that needs to be considered.

A digital capacity framework for the sector – for agencies, workers, managers and funders – would be useful.

## *Digital messaging can be a “game changer” when it comes to serving clients, including increasing access, efficiencies and effectiveness*

When asked about service efficiencies and effectiveness digital messaging has brought their organization two managers called digital messaging “a game changer” when it comes to service accessibility. WhatsApp allows them to stay on top of services with clients with complex needs (such as PTSD/mental health) who already use digital messaging as their primary communication tool. With large client caseloads and clients living across a broad geography, including within the same city, they're really able to be more responsive. And for clients with literacy issues (including in their mother tongue), the ability to send audio and video messages on the devices and apps their clients are using means instant and ongoing access for those clients (audio and video messages are available to be rewatched at any time, for example).

Digital messaging has become the thin wedge of new technology adoption, teams are becoming more and more technologically savvy implementing more use of technology, because they're seeing the immediate results of using WhatsApp in their service delivery. They imagine if they keep growing access and capacity and think of innovative ways of using technology that they may have even more impact on their clients' outcomes.

At the same time the instantaneous communication expectations with digital messaging comes with

tensions and lots of learning around how to blend technology with in-person services. How to develop key messages and bite-sized content? How to ensure that front-line workers who have been doing it for a long time embrace the technology with the vision of helping them serve their clients in deeper ways than they're currently able to because of the sheer volume?

As they roll out new services, technology is now part of the consideration of how the service will be offered. The hope is that this will increase access to services.

One interviewee outlined how digital messaging has improved services to clients. Newcomers are very busy and juggling a lot in their initial settlement and integration. It's hard for some of them to manage all the communication they get from school, appointments, from settlement agencies. It has been a challenge to reach some clients. However, they open, read and respond to instant/digital messages. This has improved communication and made it easier to keep in touch with clients. Quicker responses have meant quicker interventions. He wonders, what more do we need to learn? What apps could be useful to help set up clients with life skill needs? Most have phones, can we help them see if they're able to use Google Maps, etc., to find their way to an appointment, etc. Is there an app we can help them set up to put appointments in phones and set reminders. The smartphone has become an important tool for client integration.

*Funders are waiting for the sector to indicate the efficiencies, effectiveness of using digital messaging to serve clients, including empirical evidence*

Agencies consulted feel that technology can provide new opportunities to have greater impact in their work, but they are looking for some guidance from funders. At the same time, funders are waiting for some direction from service providers.

Service providers need to explain and not take funder capacity for granted around technology in service delivery. As one funder said: "We're going to be driven by the SPOs and their preferences, because we're not currently driving that conversation. We don't know what part of in-person services are best suited to what kind of technology platforms. It's not government policy work to say what the technology solutions are. At the moment, we have very little in terms of evidence in terms of more effective and efficient service delivery. Without that evidence, or routinely understood by the SPOs themselves, we are reluctant to make that leap or to demand that SPOs use technology more in their service delivery."

Service providers are interested in an open discussion with funders around what they would view as acceptable forms of activity by agencies they fund and where they think there are some boundaries.

When it comes to staff in itinerant programs, funders appears to understand that smartphones are important worker tools. According to a few interviewees, there is an awareness of the mobile nature of their program and that it's clear smartphones and digital messaging have improved service delivery. However, there is also a concern that this is a one time resource allocation, that it is not part of day to day service delivery.

Funders are still internally undecided about whether technology is part of direct or indirect services. By and large it is considered indirect by the funder. For the sector, however, it is clear that this technology is here to stay as an important client service tool.

Funders don't have sense of the diversity to technologies being used to serve clients, beyond simple website and email use. They'd like to see evidence from the sector that emerging technologies are



being used, and can be used to serve clients. They have an existing evidence base that says how standard services are delivered (including how privacy, data, client confidentiality standards are met), the cost of delivering that service, how effective the service is (for clients – how easy to access, fluid, how quickly do they move through it, etc.). However, they lack understanding and evidence of where technology fits into integration and service scenarios, whether it's an app, online learning, digital messaging, mentoring matching, etc. Bottom line for funders is that any service enhancements have to be efficient and effective.

Internally, funders are still struggling with their own digital literacy and how to evaluate the value of technology in service delivery: “It doesn't look like traditional service delivery. This is not a front-line worker meeting with somebody who shows up in a physical office and says I have a need, and you have to do a needs assessment for me and we'll go from there. People are confused about the idea of front-line workers talking to clients on a chat app. Limitations start with internal awareness of what technology can look like and what it could do. SPOs have to do this 'at the side of their desk.’”

Funder wants to be assured if you pay programmers large salaries to design a platform and it takes fewer of them over time to maintain it and that content development and maintenance also needs resources, this scenario could reach far more clients far more efficiently, in terms of cost of delivery and the time and effort for each individual client.

Recent funding of technology companies in the settlement space may contribute to changing internal funder understandings of technology human resource needs (both development and maintenance), however there remains an internal knowledge gap.

Federally, there is promise with the Canadian Digital Services, Digital Standards and new public service Digital Academy. Those in government who work on digital files are talking about it all the time, other program staff not as much unless there's a reason to pay attention to it. They don't have a lot of time to think about new service models, they're swamped. Any evidence or data and insights on what the landscape and practice, such as being able to answer what are user demands for digital services, would be useful. What are the gaps and pain points? Does anyone have promising solutions? How are they working? If some models are not working, what is the factor contributing to it not working? Any analysis of why things are happening or why certain things are working better than others – would be helpful. They are looking for evidence that can help provide funding direction.

One interviewee noted that government is moving into online services, but doesn't see digital service provision as legitimate.

All interviewees and focus group participants recognize that it is hard for organizations, but especially funders to move quickly to shift and adapt. Services are not as able to respond nimbly as new trends arise. They have to determine what they need, get programming, submit proposal, approvals, hire staff There is a big ramping up period. New services have to fit into existing programming structure, but also allow for quicker implementation.