



Ontario Council of Agencies Serving Immigrants

Managing in a Computerized Environment — MICE-2 Final Report

To: The Ontario Administration of Settlement and Integration Services,
Citizenship and Immigration Canada

Prepared by: The MICE-2 Conference Planning and Management Team

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Managing in a Computerized Environment — MICE-2 Executive Summary

Project Goal and Objectives

OCASI's MICE-2 project provided an opportunity for managers of CIC-funded agencies in Ontario to share their perspectives on technology in the sector through on-line discussions and at a conference in St. Catharines on June 12 and 13, 2002. MICE-2 was funded by the Ontario Administration of Settlement and Integration Services, Citizenship and Immigration Canada (CIC-OASIS).

The goal of the MICE-2 project was:

- To provide an opportunity for Executive Directors and senior managers of OASIS-funded Service Provider Organizations (SPOs) to engage in a forward-looking discussion on managing in a computerized environment and to provide recommendations to funders on future computerization priorities.

The objectives were to:

- Examine and share ideas to enhance settlement services through effective use of information technology (IT).
- Look at the essential role of information technology in the overall operations of an immigrant services agency and examine ways of strengthening and sustaining that role.
- Discuss the findings of the RealWorld Systems Evaluation Study and develop forward-looking strategies to advise CIC on future priorities.

Background

Beginning in the 1997-98 fiscal year, CIC-OASIS bought and installed computers and local area networks (LANs) at agencies offering CIC-funded programs. Initial beneficiaries were the ISAP, HOST and LINC programs. Later, OASIS also provided the SEPT/SWIS, JSW and NIC programs with computers. Centralized technical support, training for agency staff and managers, and development of the Settlement.org web-site and a sector Extranet were other elements of the broader Computerization Project.

The first MICE project (1999-2000) focused on training for agency managers. At the March 2000 MICE Conference workshop topics included: budgeting and fundraising; management styles to support computerization; communications; workplace health; and computer-related policy development. MICE also produced drafts of computer-related policies for use or adaptation by agencies. These were made available to all agencies through the Extranet.

Phase I of the OASIS Computerization Project ended in March 2002. The current fiscal year, 2002-03, is considered to be a transition year. OASIS will base Phase II on:

- Findings of the independent project evaluation conducted by RealWorld Systems and completed in May 2002
- Priorities identified at the MICE-2 conference and in meetings with Ontario Region LINC Advisory Committee (ORLAC) representatives
- Future availability of funding

MICE-2 Program Design

The MICE-2 project was designed by the MICE-2 Conference Planning and Management Team, consisting of OCASI's Executive Director and staff members, and consultants from Sinclair-Jones & Associates, Anna Menozzi & Associates Community Consulting, and Axiom Consultants.

With the aim of building consensus among participants, MICE-2 identified, validated and prioritized issues through the following steps:

- Review and analysis of prior reports from the Computerization Project
- Online discussions from April to June 2002 (Participants were mostly Executive Directors (EDs) and managers of ISAP/HOST-funded agencies. Members of the MICE-2 Team facilitated the discussion.)
- Interviews with 10% of MICE-2 conference participants
- Review of findings and recommendations of the Real World Systems *Final Report of the Evaluation of the OASIS Computerization Project* (the Evaluation Report), released on May 20th

All of the above informed the design of the June 12-13 MICE-2 conference, which was attended by 81 representatives from 60 agencies receiving ISAP, HOST, JSW and SEPT/SWIS funding. Following the opening plenary, all participants attended three small-group workshop sessions:

- Workshop 1: Use of IT to Improve or Expand Client Services
- Workshop 2: Planning for Long-Term Sustainability of IT
- Workshop 3: Sector-Wide Forward-Looking Strategies to Advise Funders

This document provides an overview of priority issues discussed by MICE-2 participants. The final section contains a summary of recommendations from the conference.

Decentralized IT Management

The OASIS Computerization Project brought a more uniform level of information technology to CIC-funded programs across the province. For some of the agencies, it was their introduction to word processing, email, and the Internet. While very much supporting the OASIS initiative, over the last four years the agencies have learned that there are additional management issues and costs related to computerization. These costs were not well understood at the beginning of the Computerization Project and are yet to be accurately assessed. (See the section on *Total Cost of Ownership*.) However EDs and managers do know that current program budgets do not fully cover their IT expenses and that they have had to absorb these additional costs into their operations.

One example is technical support. In Phase I of the Computerization Project, agency Technical Liaisons (TLs) handled basic problem solving. If they needed help, they contacted the central support centre. This system worked fairly well early in the project, in the absence of other alternatives. However TL work has become increasingly time-consuming as more equipment is installed, as applications diversify, and as equipment gets older. Thus the agency TL has less time for his or her regular job activity, which is client service in most cases. This puts a strain on human resources, particularly in agencies that have only a handful of staff members. It also creates dissonance because, for all agencies, service to clients is the top priority. Where this situation has become untenable, agencies with the resources to do so have moved away from relying exclusively on this model of technical support. Some have volunteers with technical knowledge; a few are able to pay for external technical support on an as-needed or part-time basis. However, for most agencies now struggling with the centralized support model, neither of these is a reasonable option.

The majority of MICE-2 participants agreed with a key recommendation of the RealWorld Evaluation Report, that individual agencies should manage their own technology. In fact, many already do manage computers and networks that were not provided by OASIS. Agencies have varying configurations of programs, technology, staff and client bases. EDs and managers believe that they can improve on the “one size fits all” centralized management approach of Phase I of the Computerization Project — provided they are properly resourced.

The MICE-2 conference emphasized this message to the funder: if the agencies are to manage technology effectively in support of CIC-funded programs, their funding agreements must account for all of their technology expenses. This includes management time, a new level of administration, and new human resource requirements throughout the agency.

Some MICE-2 participants had reservations about decentralizing IT management, indicating that their agencies are not fully prepared for the switch. Accordingly, the MICE-2 conference proposed an OASIS-funded leadership and coordination role for OCASI to build capacity in the sector, develop a database of information on suitable suppliers, encourage agency coordination, and otherwise support the transition to the decentralized model.

Total Cost of Ownership

Total Cost of Ownership (TCO) encompasses all direct and indirect costs of computerization, including: buying and maintaining hardware and software, technical support, Internet connection, insurance, training, consumables, data management, administration, and downtime due to power outages, crashes and viruses, for example.

The Evaluation Report recommends that OASIS adopt a per-workstation funding formula: \$250 per month for ISAP/HOST computers; \$100 per month for LINC lab computers (which typically are non-essential to programs and operations and use fewer software applications). The RealWorld consultants arrived at these figures from general research on TCO and offered them as minimum estimates until actual costs for the sector are determined. These figures do not include “extensive” training or lost productivity, for example.

The concept of TCO was new to most MICE-2 participants, and many were not sure how the TCO model would apply to OASIS computers in their agencies. The true dollar figure for TCO will differ not only by computer use (ISAP/HOST or LINC) as suggested by the Evaluation Report, but also by size of agency, geographic region, and number of workstations. Concerns were expressed about how best to build TCO into agency budgets.

In short, TCO for OASIS Computerization Project agencies needs more study. However, this model does have the support of MICE-2 participants, with a strong consensus that a realistic formula for TCO and guidelines for implementation will allow both the funder and individual agencies to plan and manage computerization effectively.

MICE-2 participants want a contribution to TCO to be included in next year’s project budgets. To facilitate decision-making, they will accept the Evaluation Report’s minimum interim figures. Based on \$250 per ISAP/HOST workstation per month, and 433 workstations (as of February 2002), this implies an initial contribution towards TCO of at least \$1.3 million a year. Furthermore, MICE-2 participants made a clear recommendation to OASIS: TCO funding must be “new money”, that is, not taken from their current program funding. OASIS representatives were just as clear in their response: they have no new money currently allocated for the next fiscal year.

The discussion of funding to support computerization inevitably brought the MICE-2 conference to the broader issue of how the sector is funded overall. The agencies have a strong sense of the value of settlement and immigrant services to the Canadian government and to Canadian society. They do not see

the value of this work fully reflected in the sources and levels of their funding. For example, MICE-2 participants would like to see more of the funds generated by federal government immigration fees going into settlement and immigrant services. They also believe that other government departments should fund their settlement and immigrant service work, including support for their technology expenses. The OASIS representative at the MICE-2 final plenary informed participants that the issue of IT funding will be raised at the ongoing Funders' table meetings.

MICE-2 participants also stressed that one-year project funding makes it difficult for them to do effective planning and imposes an unnecessary administrative burden. While recognizing that this issue is determined by policy at the national level, they requested that CIC move to multi-year funding as soon as possible and also that OCASI continue its advocacy in this area under the Voluntary Sector Initiative.

IT Training

Training in computers and IT is now an essential element of professional development in the sector.

Centralized and regionalized training worked well to train large groups in Phase I. However, in the future, the focus will be on training new staff, and on occasional upgrading and personalized coaching on an as-needed basis for existing staff.

Participants at the MICE-2 conference emphasized the importance of IT training as an ongoing effort. A majority indicated they did not want training centralized in the future, but there was no strong consensus on an alternative way to fund and deliver IT training. The MICE-2 Team suggests that during the capacity-building phase, the focus should be on training managers on decentralized IT management and implementing TCO. The overall issue of training for the sector should be re-visited after the transition period.

There was also some support from MICE-2 participants for an IT-focussed program modeled on OCASI's PET program, which is centrally funded and coordinated and allows agency staff members to find accessible and appropriate professional development opportunities.

The Computerized Environment

Most managers say that IT allows their agencies to serve clients better. At this stage of computerization in the sector, this most often means they can access and process information faster. The prevailing view is that the essence of client services is still the human touch, and that computers are merely tools that influence how work is done, not what work is done or the outcomes.

MICE-2 participants did report on several notable developments due to IT. For example, their agencies now regularly receive and reply to emails from prospective immigrants outside Canada. This is a completely new group of clients and a valuable new service that agencies provide.

Managers also said that employment is a primary key to settlement and that their agencies must stay current with the technology of job search. Agencies need up-to-date software and fast, reliable Internet connections. Counsellors must be able to assist clients in preparing résumés and conducting online job searches.

Some agencies provide service through their web-sites — information, links to resources, and posting of client résumés, for example. Settlement.org has many resources for newcomers — including those who cannot access CIC-funded programs. The Extranet (the area of Settlement.org that is restricted to people working in the sector) has great potential as an online meeting place, although it needs more marketing, coordination and skilled facilitation to attain this potential.

During MICE-2 discussions of how the computerized environment affects the sector, it was evident that the Immigration Contribution Accountability Measurement System (ICAMS) is the most unwelcome of the external influences.

CIC National Headquarters (CIC-NHQ) recently delivered new ICAMS computers to agencies they fund. Prior to MICE-2, many agency managers did not understand that these are not part of the Computerization Project and that OASIS was not part of the decision-making related to these new computers. Currently only LINC-funded agencies participating in the ICAMS pilot project use these computers. The ICAMS computers are not networked with other computers (a requirement of CIC-NHQ), so they often sit idle, and staff must enter data separately on them. This is an uncoordinated and wasteful system, managers point out. But the more serious concern, shared by all EDs and managers at MICE-2, is the potential full implementation of ICAMS. The sector fears that information their agencies provide through ICAMS could be misused, compromising client confidentiality, endangering some clients, and putting Boards of Directors at risk for violations of the Privacy Act.

Client Service Databases

MICE-2 participants recognize that database applications to record client services are powerful tools for agency management and program planning. They also say that developing such applications within the sector would be a proactive response to funder-designed, funder-imposed and uncoordinated recording systems.

Agencies are clear on their priorities: flexibility (for large and small agencies, to meet reporting requirements of different funders with one-time entry of data), client confidentiality, and information security. All MICE-2 workshop groups discussed additional requirements at length.

Only a very few agencies currently have the resources to develop their own database. MICE-2 participants asked OCASI to request funding from CIC or elsewhere to do a study of requirements for client service databases, based on best practices from within their own and other non-profit sectors. A key objective would be to facilitate a process to define common fields to be incorporated into a database framework that could be used by all agencies in the settlement and immigrant services sector. The results of such a study would be a template that would inform individual agencies' choices to design, commission, or buy and customize an existing database application.

MICE-2 participants want funders to recognize that managing information — both the choice of a database and ongoing maintenance — is part of TCO.

MICE-2 Recommendations

The 7 discussion groups at the MICE-2 conference developed a total of 42 recommendations for presentation at the final plenary. The transcript of all workshop recommendations is provided in the body of the *MICE-2 Final Report*.

The summary below represents themes that emerged from an analysis of group discussions and recommendations, with a “middle-ground” version of timeframes and responsibilities.

1. Recommended that CIC-OASIS, in partnership with OCASI, convene a Funders' table as soon as possible to discuss the urgent needs of the settlement and immigrant service sector, and in particular new resources to sustain IT.
2. Recommended that CIC-OASIS pilot a two-year program funding period for the settlement and immigrant service sector, beginning in 2003.

3. Recommended that OCASI explore funding to conduct a study of actual Total Cost of Ownership (TCO) in the sector and that OCASI coordinate or conduct such a study. This study should delineate and cost components of TCO; should be based on minimum standards for hardware and software; and should include alternative models of technical support and training.
4. Recommended that CIC-OASIS move to decentralized IT management for ISAP/HOST-funded agencies, as per Recommendation #3 of the RealWorld Evaluation Report, with implementation as soon as possible.
5. Recommended that CIC-OASIS implement an interim per-workstation funding provision to agency budgets, as per Recommendation #1 of the RealWorld Evaluation Report, to coincide with decentralization of IT management.
6. Recommended that OCASI and CIC-OASIS jointly conduct a communications/information campaign to ISAP/HOST-funded agencies in preparation for decentralization. One task of this campaign should be to gather and share best practices of IT management within the sector.
7. Recommended that OCASI conduct a brief survey or consultation on agency capacity and readiness for decentralized IT management. The results of this survey will inform planning for:
 - Strategic capacity building within the sector
 - Centralized assistance (e.g. regional consultants; call-in centres; on-line support)
 - Sharing elements of IT service and/or management among agencies

The study should recommend reasonable time frames and benchmarks for increased capacity and the transition to decentralized IT management. CIC should fund all phases of this initiative and OCASI coordinate its implementation. This should be done as soon as possible.

8. Recommended that OCASI seek funding from CIC-OASIS and other sources, and conduct or oversee a study of the requirements of an information management system that is adaptable for broad application within the settlement and immigrant service sector. This should be a highly participatory process involving agencies and key funders. (This is expected to be a 2-3 year initiative.)
9. Recommended that OCASI support decentralized IT training for the sector. An immediate strategy should be to expand the PET program; or create a parallel program with an IT focus. Ways of delivering decentralized, “just-in-time” IT training or coaching should be a key area for study and planning within all other initiatives — the capacity building strategy, the TCO study, and information management system study.
10. Recommended that a MICE-2 Follow-up Committee, or other OCASI committee, follow-up on the need and support within the sector for OCASI to do advocacy in the area of expanding the definition of eligible clients in light of new ways of providing service through access of online resources, email, and web-sites.
11. Recommended that the MICE-2 Follow-up Committee, with the support of OCASI, design and implement a process to allow for continuing communication on progress on the MICE-2 recommendations.
12. Recommended that the above initiatives make ongoing and innovative use of the Extranet in order to confirm and expand its role in the sector.

Managing in a Computerized Environment — MICE-2

Final Project Report

1.0 Introduction

1.1 Project Goal and Objectives

OCASI's MICE-2 project provided an opportunity for Executive Directors and managers of CIC-funded agencies in Ontario to share experiences and perspectives on technology in the sector through on-line discussions and at a conference in St. Catharines on June 12 and 13, 2002.

The goal of the MICE-2 project was:

- To provide an opportunity for Executive Directors and senior managers of OASIS-funded Service Provider Organizations (SPOs) to engage in a forward-looking discussion on managing in a computerized environment and to provide recommendations to funders on future computerization priorities.

The objectives were to:

- Examine and share ideas to enhance settlement services through effective use of information technology (IT).
- Look at the essential role of information technology in the overall operations of an immigrant services agency and examine ways of strengthening and sustaining that role.
- Discuss the findings of the RealWorld Systems Evaluation Study and develop forward-looking strategies to advise CIC on future priorities.

1.2 Background

In the 1997-98 fiscal year, the Ontario Administration of Settlement and Integration Services, Citizenship and Immigration Canada (CIC-OASIS) bought and installed computers and local area networks (LANs) at agencies offering CIC-funded programs. Agencies with ISAP, HOST and LINC program funding were the first to receive computers. Over the next four years, the Computerization Project expanded to include the new SEPT/SWIS, JSW and NIC programs. Centralized technical support was provided, as well as training for staff. Development of the Settlement.org web-site and a sector Extranet were additional elements of the broader Computerization Project.

The first MICE project (1999-2000) was primarily a training project for managers of agencies with ISAP and HOST program funding. At the March 2000 MICE Conference workshop topics included: budgeting and fundraising; management styles to support computerization; communications; workplace health; and computer-related policy development. MICE also produced samples of computer-related policies, made available to all agencies through the Extranet.

The OASIS Computerization Project was a major initiative to raise capacity within the settlement and immigrant services sector. Previously some agencies had been doing business without word-processing, email or Internet access.

What OASIS now calls Phase I of the OASIS Computerization Project ended in March 2002. The current fiscal year, 2002-03, is considered to be a transition year. OASIS will base Phase II on: findings of the independent project evaluation conducted by RealWorld Systems completed in May 2002; priorities identified at the MICE-2 conference and in meetings with representatives of the Ontario Region LINC Advisory Committee (ORLAC); and future availability of funding.

2.0 MICE-2 Program Development

2.1 Overview of Project Activities

The principal activities of the MICE-2 project were:

- Program design
- Online discussions at the Settlement.org Extranet
- Conference coordination
- The MICE-2 Conference on June 12 and 13, 2002
- A project report, including recommendations

OCASI had overall management responsibility for the MICE-2 project, including general and financial administration. The project was planned and implemented by the MICE-2 Conference Planning and Management Team (MICE-2 Team). Members of the Team were: OCASI staff members, including the Executive Director, Debbie Douglas; and consultants from Sinclair-Jones & Associates, Anna Menozzi & Associates Community Consulting, and Axiom Consultants.

The MICE-2 Team worked closely together, with all members giving input into various aspects of the project. Individual members played a lead role in particular areas of responsibility:

- Project manager — Howard Sinclair-Jones, Sinclair-Jones & Associates
- Conference coordinator — Immaculate Tumwine, OCASI
- Program and workshop design — Anna Menozzi, Anna Menozzi & Associates Community Consulting
- Animator and moderator for online discussions; design of conference plenary sessions — Yew Lee, Axiom Consultants
- Principal writer for project report — Carolyn McGill, Axiom Consultants

The MICE-2 Team held teleconferences approximately once a week during the three months prior to the conference. Members also communicated frequently by email to stay in touch between teleconferences and to exchange documents. The MICE-2 Team continued to work after the conference to finalize the project report and recommendations.

2.2 Program and Workshop Design

The first stage in the development of project themes and the design of conference workshops was a review and analysis of documents from Phase I of the Computerization Project. These were:

- MICE Project (1999-2000), Report and Recommendations
- Coaching and Training Project for Technical Liaisons, Report and Recommendations
- OCASI reports on various activities related to Settlement.org and the Computerization Project
- Computerization Project reports

The MICE-2 Team decided to use online discussions as a pre-conference forum for the sector to frame issues related to computers and information technology (IT). From the document review, the MICE-2 Team identified initial themes to open the online discussions. After discussions had been underway about five weeks, ongoing and emerging themes from the MICE-2 discussion forum were considered as a list of potential issues to be addressed at the conference. The MICE-2 Team prioritized this list to identify 3 major theme areas for conference workshops:

1. Use of IT to Improve or Expand Client Services
2. Planning for a Client Database
3. Planning for Long-Term Sustainability of IT

Canvassing interviews on these 3 themes were conducted with 10 sector EDs and managers who had been active in online discussions and, as a group, represented the views of small and large, urban and rural agencies. These interviews confirmed priorities and the design-in-progress of the conference workshops. Throughout this work, questions and information were fed back into the ongoing online discussions. When the Evaluation Report was released, its recommendations were added to the options under consideration.

Background documents were prepared to give concise outlines of issues and options under theme areas. Participants received these background sheets prior to the conference and in their conference kits. (See Appendix One.)

The 7 workshop facilitators had a one-day preparatory meeting at OCASI on June 4 to do a run-through of workshop processes.

All conference participants proceeded through Workshops 1 to 3 in order:

- Workshop 1: Use of IT to Improve or Expand Client Services
- Workshop 2: Planning for Long-Term Sustainability of IT
- Workshop 3: Sector-Wide Forward-Looking Strategies to Advise Funders

Groups of approximately 10-12 people stayed together throughout all 3 workshops. This was conducive to in-depth work on issues.

In Workshops 1 and 2, MICE-2 participants identified issues for action, and began to discuss constructive solutions. In Workshop 3, each group reviewed earlier points of discussion to develop IT-related recommendations. At the final plenary, an overview of recommendations from all 7 workshop groups revealed consensus and priorities within the sector.

2.3 Online Discussions

Online discussions on topics relevant to MICE-2 took place at the Extranet for approximately nine weeks prior to the conference (April 8 to June 11, 2002). The purpose of the MICE-2 discussion forum was to:

- Provide input to the design of the conference processes and workshops, by helping to identify priority issues and options for recommendations
- Begin an exchange of ideas among MICE-2 participants prior to the conference
- Provide information — about the conference, about recent developments related to the OASIS Computerization Project, and background on IT issues — to MICE-2 participants and other interested workers in the sector

Animation was directed at the agency representatives on the MICE-2 conference invitation list, mostly Executive Directors. However other workers in the sector were free to take part in discussions. MICE-2 Team members reviewed messages regularly and frequently made contributions.

The primary purpose of animation was to encourage participation in the online discussions. On occasion, the phone calls actively facilitated contributions to the forum, particularly for first-time posters, or those experiencing technical difficulties. The calls were also helping in gathering informal feedback about the computerized environment in individual agencies.

The MICE-2 Team opened the forum with three initial topics. Agency representatives replied to the moderator's postings, and also opened new topics. Just prior to the conference topics in the forum (listed with the most active first) were:

1. Standard Client Database and MIS
2. What are New Issues for Staffing and Training?
3. And, Speaking of Funding...
4. What Will Settlement Work Look Like in the Future?
5. How Do We Strengthen and Sustain IT Systems?
6. Black Box Computer (ICAMS)
7. Options for Technical Support
8. Online Discussions — General
9. JSW
10. Freegate and the Slowest Connection on Earth
11. Your Impressions of RealWorld Evaluation Report
12. Super Prizes for Participation Online
13. CIC-Metafore Support for 2002-03
14. Technical Liaison Needs Help!
15. MICE-2 Fun Bowling Tournament
16. Client Database/Management System for ISAP/HOST
17. Why LINC is Not Invited to the MICE-2 Conference?
18. Volunteers and Technology
19. Executive Director Burn-Out

Appendix Two contains a detailed description of the discussion under each topic.

2.4 Conference Coordination

Five OCASI staff members were involved in various stages and aspects of conference planning, logistics and delivery (in addition to the Executive Director being a member of the MICE-2 Team).

OCASI invited 82 agencies to participate in MICE-2. These were all Service Provider Organizations (SPOs) receiving ISAP, HOST, JSW and SEPT/SWIS funding from OASIS. Agencies were informed that given the focus on setting priorities related to computerization, their representatives at the MICE-2 conference should be directors and managers.

The original communiqué and registration forms went out by email on March 20. These were followed by mailed information packages and notices at the Extranet. OCASI staff continued to boost conference registration with phone calls and emails to agencies. They provided the MICE-2 Team with regular progress reports. In particular, they supplied updated contact lists to the online discussion animator.

All major project communications to participants went through OCASI and the Extranet. OCASI maintained the conference registration list. OCASI coordinated travel and accommodation for participants, and made all arrangements with the Ramada Parkway staff regarding conference facilities, meals, and participant accommodations.

The local host organization, the Folk Arts Council of St. Catharines Multicultural Centre, provided orientation and facilitation to OCASI on local issues; and coordinated with OCASI on social events, local souvenirs, and personnel who were hired as scribes and receptionists.

3.0 MICE-2 Conference

The MICE-2 Conference took place at the Ramada Inn and Convention Centre, St. Catharines, Ontario on June 12 and 13, 2002.

There were 105 participants at the conference. This number included 81 representatives of 60 agencies, facilitators, staff of CIC-OASIS, OCASI staff, MICE-2 Team members, and presenters. The main activities of the conference were:

Wednesday, June 12, 2002

Welcome and Opening Remarks

Opening Plenary

Panel: *Success Stories — Computerization to Serve Communities*

Evaluation Report on the OASIS Computerization Project

Workshop 1: Use of Information Technology (IT) to Improve or Expand Client Services

Workshop 2: Planning for Long-Term Sustainability of IT

Thursday, June 13, 2002

Workshop 3: Sector-Wide Forward-looking Strategies to Advise Funders

Presentation on the Self-Help Online Technical Support Network (Volunteer@ction.online)

Reports on Recommendations from Workshop Groups

Initial Responses from OCASI and CIC-OASIS

Discussion of Conference Follow-up

A detailed conference agenda is included in Appendix One.

3.1 Opening Plenary

3.1.1 Welcome

Debbie Douglas, Executive Director of OCASI, welcomed participants. She told them to expect intense workshops, in which they would be asked to look forward to the next phase of computerization and to prepare recommendations to the sector and its major funders. These recommendations might include ideas for new ways of partnering. OCASI's role was to ensure that tools, models and processes could be shared among agencies in the sector.

Elizabeth Gryte spoke next on behalf of the project funder, CIC-OASIS. She said her particular interest was discussion about the Evaluation Report. She praised that report and its recommendations. She informed MICE-2 participants that OASIS was already planning to discuss the report with other funders.

3.1.2 Panel: Success Stories — Computerization to Serve Communities

Nancy Friday of AlphaPlus and Shannon Stevens of the Ontario Community Support Association each made a presentation, then answered questions from the plenary.

Highlights of Nancy Friday's Presentation

AlphaPlus provides practitioners and organizations that work in the literacy field in Ontario with information, resources, support (technical and pedagogical), and project development. The literacy sector in Ontario began using a computerized discussion network in 1988. This network now has over 100 ongoing discussion topics. The system is also used for meetings. The discussion network reduces isolation and allows users to share information and ideas, conduct business, do research, and take part in professional development workshops.

The literacy sector's funders — the Ministry of Training, Colleges and Universities (MTCU) and the National Literacy Secretariat of Human Resources Development Canada (NLS) — have encouraged the move to computerization and provided funding and computers to assure a “level playing field” in terms of agencies' technical capacities. In 1996 the sector began to develop online learning opportunities for literacy learners and for agency staff and volunteers. In 2000, the MTCU, after consulting the sector, decided to standardize the collection of statistics. Agencies now provide information monthly to the funder using a province-wide information management system.

Highlights of Shannon Stevens' Presentation

OCSA is a provincial association that works with 360 home and community care agencies that help people live at home. OCSA's web-site lists resources available in their lending library and has online Care Guides for caregivers. OCSA uses a listserv to communicate with member organizations. This allows OCSA to advertise new resources, and to gather and distribute feedback from its members very quickly — sometimes within 24 hours. OCSA's Board of Directors has its own listserv, which eliminates some in-person meetings. OCSA offers an on-line Advanced Volunteer Management Course, which is particularly beneficial to people in small or rural communities who have limited access to training opportunities.

IT has enhanced the sense of community in OCSA's sector, and improved connections with remote and rural organizations. Shannon advised that it is important to take time at the beginning stages of development to conceptualize a system that will be effective to meet an organization's needs and goals.

Key Points from Question and Answer Period with Panellists

- Panellists responded to a question about the relative strengths of listservs and discussion groups. About 10 messages a day is manageable on a listserv, but if there are many users it can gather too much information for members to process. On the other hand, if a listserv topic is too specific, it won't generate enough action.
- A discussion group can be accessed at the user's convenience. But people have to register first and subsequently remember their password. This can create barriers, so user support is necessary. Another barrier is that the workplace culture doesn't generally regard taking part in a discussion group as doing legitimate work.
- It is important to recognize a learning curve for staff, and build in time to play and demystify the computer (low-stress training). OCSA didn't have a big training budget, so they took a little extra lunch time once a week for group coaching. In this way, everyone learned from each other.
- Managers must recognize that the process of work is being transformed, for example: use of email to serve clients, time spent online searching for information, cost and staff time for IT training. There is also management time related to IT. Agencies have to price all of this and take the results to their funders.

3.1.3 Evaluation Report on the OASIS Computerization Project

Mike Battrick of OASIS introduced this portion of the plenary. He said the findings and recommendations of the Evaluation Report were input into OASIS's decision-making for the next phase of the Computerization Project. He introduced Gillian Kerr of RealWorld Systems, with thanks to her for the forthright and honest opinions in the Evaluation Report.

The presentation focussed on the four key recommendations of the Evaluation Report. (These are reproduced in Appendix One of this report. Copies of the complete *Final Report of the Evaluation of the OASIS Computerization Project* were included in participants' conference kits.)

Summary of Gillian Kerr's responses from the Question and Answer period

- A mechanism to transfer best practices is needed. A suggestion: each year nominate people in the sector who are managing IT well, analyze what they are doing, and track this over time.
- Having an in-house IT specialist and hiring outside help are both expensive options. Management capacity within the agency may be the deciding factor for making the choice. To keep costs down, perhaps use a consultant just to evaluate an agency's management of IT.
- Managers need general management expertise, not specifically IT knowledge. Define "mission critical" functions for the organization. This takes time and may require new resources. With Total Cost of Ownership (TCO) included in their budgets, managers can choose from a number of ways of managing IT.
- There are 3 key components to managing technology: (1) Keep machines and email running. (2) Look at the impact of technology on Human Resources. (3) Look at the impact of technology on program options.
- There is a network effect related to the use of IT. The transformation to where the sector will see the real benefits of IT is just beginning. A client database will have huge advantages.
- Ideally, the evaluation should have looked at IT as a tool to serve clients. But the baseline (pre-computerization) data was not available, so RealWorld could not measure the effects of technology in this important area.
- Smaller agencies will likely find it harder to manage than larger agencies if the per workstation funding figures recommended by the Evaluation Report are applied across the sector. The report contains some detail on RealWorld's study of TCO, but ultimately the per workstation figures are "best guesses".

Following the Question and Answer, Elizabeth Gryte of OASIS confirmed that she supports technology in the sector, but her budget is fixed. She can't give more funding to computerization without taking away from some other area.

3.2 Workshop Discussions

For the workshops portion of the conference, participants moved into their assigned groups. Each discussion group appointed a recorder, who noted key points of discussion on flip chart sheets. These sheets were posted around the meeting rooms. Participants referred back to them frequently, adding to them and marking potential recommendations. During Workshop 3, participants reviewed all sheets to identify theme areas for recommendations and important points to be included in the wording.

The summaries of workshop discussions in the following sections were prepared from an overview of the following source materials:

- Scribe notes of workshop discussions
- Transcriptions of flip chart sheets from each group
- Summary notes from group facilitators
- Group recommendation sheets

3.2.1 *Workshop 1: Use of Information Technology (IT) to Improve or Expand Client Services*

There were two main topics of discussion in this workshop.

- Utilising IT to improve and expand client services
- A sector-specific and common client database

Key Points From Workshop 1 Discussions

1. Utilising IT to improve and expand client services

Participants related ways in which IT had affected settlement and immigrant services at their agencies. Faster ways to access and share information were most often mentioned. Most government information and forms are online; and email is now the preferred method of communicating and sharing documents. It was also noted that the ability to work faster has been closely followed by the expectation of this speed among clients, colleagues, and funders.

MICE-2 participants generally said that IT has changed how they work, but not what they do. They cited a few exceptions. The most frequently mentioned example was that email communication has expanded the scope of agency service to a whole new group of clients. Prospective immigrants, that is people who are still overseas, frequently contact agencies for information. In this way, settlement for some clients now begins even before they enter the country.

Managers also said that employment is a primary key to settlement and that their agencies must stay current with the technology of job search. Agencies need up-to-date software and fast, reliable Internet connections. Counsellors must be able to assist clients in preparing résumés and conducting online job searches.

Some agencies have web-sites that provide information and resources, and a few post client résumés. Most agencies have rather basic web-sites. None reported any interactive web-based services or activities.

There were comments in several groups that settlement work still requires a human touch. Computers are tools for the counsellors or the clients. Settlement workers are still required to interpret, facilitate, and explain what information means in a Canadian context.

A number of groups discussed issues related to funding for services that an agency provides by email or through a web-site. Managers know that their settlement workers spend time on emails to or on behalf of clients, and that in doing so they are providing service. But they are not sure if the funder counts this as client service under the funding agreement. When a client is served by email or through a web-site, there is no file on that client, so some managers asked how they could validate the service. Most groups said there is a need to re-define client eligibility in light of the impact of IT on the sector; and most also discussed broader issues related to redefining settlement.

There was general consensus that IT is now integral to settlement work. However, there were also a few remarks to the effect that IT is more trouble than it is worth. One insight into this was: “If the IT tools and resources are adequate to the job, the technology enhances our capacity to do quality and timely settlement work. If it is not, the cost of constantly fixing problems and the stress becomes so high that any possible advantages are cancelled.”

2. A sector-specific and common client database

MICE-2 participants said that a client service database would be a powerful planning, management, and administrative tool. A few agencies already have such a system, but most have not had the resources to develop or buy a database. They produce reports for themselves and for their funders using Word or Excel. The discussion in Workshop 1 was aimed at finding a solution applicable to the sector. All groups responded positively to this option.

Although the term “common client database” was used in conference handouts, MICE-2 participants made two clarifications. Firstly, they need a database to track *client services*, not clients. Also, they are not interested in a database common to the sector: agencies will maintain distinct databases.

Most groups discussed the option of having a database application developed centrally. Such an application would have to be flexible, so it could be customized by individual agencies. However, following Workshop 2 discussions on decentralized IT management and TCO, participants realized that

there might be other options available to them. Some agencies might choose to partner on database development; others might prefer to buy and adapt an existing application. By the final plenary, OCASI had a mandate to do a study of sector requirements for agency databases, including a review of what currently exists in the settlement and immigrant service and other NGO sectors.

MICE-2 workshop groups developed “wish-lists” for a database application, confirming the priorities identified at the online discussions. Needs related to agency management and protection of client confidentiality were the most important concerns.

MICE-2 participants emphasized that databases developed by the sector will be management tools to help agencies with self-evaluation relative to their service goals. Reporting requirements of funders will be considered as an accountability and/or contractual obligation within the design. A database application should be flexible, allowing for changes and growth within the agency. Various users should be able to access only the fields relevant to their programs; other fields would be shielded from them. All reports — for internal or external use — would require a reasoned and responsible selection of information fields. All the information in the database should be protected with a “firewall”.

Most groups discussed the Immigration Contribution Accountability Measurement System (ICAMS) negatively in this portion of Workshop 1. They said ICAMS is an example of a funder-imposed management information system that uses agency resources for the purposes of funder evaluation, without bringing useful outcomes to the agency. As an even greater concern, MICE-2 participants said that providing information tied to IMM 1000 numbers, as ICAMS does, is a breach of client confidentiality and could put their agencies in violation of the Privacy Act. Many people learned for the first time at MICE-2 that ICAMS is a project of CIC-NHQ — not CIC-OASIS — and it is totally unrelated to the Computerization Project. (All CIC-funded agencies received ICAMS computers. Only those LINC-funded agencies participating in the pilot phase of ICAMS currently use them for reporting to CIC-NHQ.)

In conclusion, the settlement and immigrant service sector wants to move toward more powerful management information systems. Design of such systems should be driven by the needs of agencies, their clients and communities.

3.2.2 Workshop 2: Planning for Long-Term Sustainability of IT

This workshop looked at the concept of Total Cost of Ownership (TCO) and how it might apply to future funding of the Computerization Project.

Key Points from Workshop 2 Discussions

The MICE-2 conference gave a strong vote of support to decentralized management. Most managers said they can do a better job for their agencies than the “one size fits all” approach of Phase I, and they are prepared to make their own decisions about use of their IT resources. In fact, many already do manage technology that is not part of the OASIS Computerization Project.

Agency representatives had various reasons for supporting decentralization, depending on their size, location, technological capacity and other variables. Most often mentioned was that, in many agencies, TL time is more than they bargained for. This is a stress on smaller agencies, as the TL is usually a settlement worker. Also, centralized support is remote support for agencies that are not close to Toronto. They get advice and parts, but have to make repairs themselves. Most agencies would prefer to purchase technical support. Some who can afford it are already doing so.

Some agencies do not feel prepared to take on IT management, or for other reasons would prefer to “opt out” if the proposed change to decentralized management takes place. Their interests were represented in a number of group recommendations related to a transition period and capacity building.

Workshop 2 participants reviewed a list of all the direct and indirect costs that are usually considered to be part of TCO. (This list is included in Appendix One.)

Most MICE-2 participants were not sure whether the \$250 per month per ISAP/HOST workstation proposed by the Evaluation Report was enough to cover all agency IT costs. (The Evaluation Report says the figure does not include extensive training or include provision for lost staff productivity; also that it will require careful management to get by on this amount.) One concern is that ISAP/HOST computers are now nearing the end of their useful life. If agencies have to buy or lease new computers immediately, that will use up much of the first year's allocation. Several groups thought that OASIS should supply new computers to all agencies to "level the playing field" before applying the new funding model. Others mentioned that a figure for TCO was meaningless unless certain standards for agency IT were established first.

There were four points of overall consensus on TCO:

- The issue needs more study, specifically as it applies to the settlement and immigrant service sector. The conference gave OCASI a mandate to conduct such a study.
- While the study is underway, agencies would like CIC-OASIS to implement the "minimum" contribution recommended by the Evaluation Report.
- Realistically, TCO can't be implemented as a simple figure or formula. It requires a contribution rationale that takes into account economies of scale and changes over time.
- Settlement service funding should not be reduced to support IT. (This point was in response to remarks by Elizabeth Gryte of OASIS at the opening plenary.)

Training is usually considered to be part of TCO, but there was no strong consensus on how individual agencies or the sector should manage IT training. MICE-2 participants did clearly state the importance of IT training as an ongoing effort. In Phase I of the Computerization Project, centralized training worked fairly well to train large groups. However, in the future, the focus will be on upgrading and training new staff and so individual or small-group training is preferred. Managers do like the model of OCASI's PET program. There was support for OCASI to coordinate IT training for the sector, at least in the short term.

Discussing funding for TCO inevitably brought all groups to the subject of how the sector is funded overall. MICE-2 participants have a strong sense of the value of settlement and immigrant services to the Canadian government and to Canadian society. They do not see the value of this work fully reflected in the sources and levels of their funding. They said that more of the funds generated by federal government immigration fees should go into settlement and immigrant services; also that other government departments should fund settlement and immigrant service work, including support for their technology expenses.

MICE-2 participants addressed the problems of managing under one-year funding contracts. The inherent uncertainty does not allow them to optimize resources or do medium- or long-term planning. The sector wants CIC and other funders to move to multi-year funding.

3.2.3 Workshop 3: Sector-Wide Forward-looking Strategies to Advise Funders

In Workshop 3, participants:

- Reviewed the work done in Workshops 1 and 2
- Developed a forward-looking strategy to advise funders on how to support IT in the sector
- Formulated strong, concise recommendations

Workshop Recommendation Sheets were provided as a template for the wording of recommendations.

Workshop Recommendation Sheet

- Topic
- We recommend that: *(Include to whom the recommendation should go.)*
- What and When: *(Action(s) that should be taken, including need/rationale and timeline if necessary.)*
- Who should be involved: *(Specify role of the sector/membership, role of OCASI, other groups, etc.)*
- How: *(Strategy to advance implementation e.g.: advocacy actions, funding, influence methods, etc.)*

Key points, themes and options as recorded on flip chart sheets during Workshops 1 and 2 helped groups to formulate their recommendations. Recommendations went forward by consensus and group members collaborated to finalize wording.

In response to OASIS's request for input from the sector, many recommendations addressed how IT should be funded in Phase II of the Computerization Project. Groups also directed recommendations to OCASI and to agencies, demonstrating a will for the sector to become more active in shaping the computerized environment.

Group 1 Recommendations

Technological sustainability

Recommended that funders recognize that Information Technology is fundamental to the delivery of settlement services and that appropriate resources be allocated in a decentralized environment, where Total Cost of Ownership is defined and monitored by the sector to sustain the process of computerization without negatively affecting existing levels of funding. Action should be taken during the present 2002-2003 fiscal year. OCASI is to take leadership in coordinating the TCO definition process with stakeholders and liaise with funders on behalf of the sector.

Data collection systems

Recommended that the sector act on the need to establish agency accountability by designing its own databases, using a common language that meets the needs of:

- The agency data collection requirements
- The client documentation requests
- The funders' reporting requirements

Action should be taken within this fiscal year by a working group of OCASI membership in consultation with other social service sectors.

Voluntary Sector Initiative

Recommended that the sector support OCASI in its work with the Voluntary Sector Initiative to promote multi-year operational funding for settlement agencies. This funding is to include, but should not be limited to, supporting IT needs. Action should be taken during this fiscal year. OCASI should take leadership to advance implementation.

Extranet

Recommended that the Settlement.org Steering Committee review the mandate, role and responsibilities of the Extranet in the sector with a view to enhancing it.

(Group 1 recommendations, continued)

Funding

Recommended that within the current fiscal year, CIC bring the funders to the table to determine ways of adequately supporting resources for the technological needs of the settlement sector. OCASI should bring sector perspective to the table and report the outcomes on an ongoing basis.

IT training and professional development

Recommended that the professional development budget allocations be enhanced to support lifelong learning needs of agencies and, in particular, ongoing IT training and upgrading. This action should be taken through a decentralized environment where the sector identifies and implements the total cost of ownership. Implementation is a role for OCASI.

Evaluation of the OASIS computerization project

Recommended that OCASI take leadership in consultation with its membership and with other sectors and act as soon as possible to establish a process to research and verify the total operation costs per workstation, as defined in the May 20 evaluation report.

Follow-up of MICE-2 conference recommendations

Recommended that the Board of OCASI follow up and ensure mechanisms for implementation of the recommendations coming out of the MICE-2 conference. This should start within the current year.

Technical support

Recommended that, in a decentralized environment, the TL function be replaced with a systems administrator, funded based on the individual agency needs and in support of building sector IT capacity. This should take place within the current fiscal year.

Group 2 Recommendations

Independent review and analysis of the funding formula for TCO

Recommended that this work be carried out:

1. Ensuring that all costs are included, i.e. capital, maintenance, training, Internet, upgrades, software, management infrastructure, replacement costs, supplies, peripherals, technical liaison/support
2. Comparisons with TCO budgeted by CIC, other public and private sector institutions
3. Analysis and variances incorporated for geographic (urban/rural) and size differences between agencies
4. Formula should be adjusted annually to allow for cost escalations

After an independent review and analysis, do a consultation and obtain endorsement from agencies before finalizing the formula. Agencies should have a choice to opt out and continue with the status quo, that is, CIC retaining responsibility.

Total Cost of Ownership

Recommended that negotiations toward TCO must conform to existing IT funding plus any new funds CIC and the funders round table may find, but not use core settlement dollars from any of our funders. (Rationale: marginalized clients without computer and/or language skills.) At this time sector agencies are *not* willing to give up settlement service dollars to offset TCO and new technology. The funders round table should include: OCASI, CIC, the province of Ontario, and the United Way of Ontario.

(Group 2 recommendations, continued)

Settlement agency needs to manage/control its own technology dollars

Recommended that:

- CIC direct IT management dollars to agencies *
- Agencies should be able to switch between IT lines and dollars
- Agencies should also have a choice of leasing or buying

* Rationale: For IT management agencies should have the option to plan partnerships and hire one IT professional to work with 2-3 agencies (depending on the number of workstations). The benefits are that this is cheaper than calling consultants. The staff gets to know the agencies' unique needs, etc.

ISAP computers and software need upgrading. That agencies propose that they will:

1. Create pools/partnerships to purchase (to get group volume deals)
2. Will buy what is really needed by the agencies (as opposed to being sent laptops or projectors that may not be used)

OCASI, in consultation with the service agencies, could be involved in setting some minimum standards for hardware and software. CIC should include the cost of group hiring of IT professionals in the Total Cost of Ownership.

MICE-2 recommendations follow-up

Recommended that a "MICE-2 Recommendations Follow-up Committee" be formed to work with OCASI and CIC toward the implementation of these recommendations.

ISAP — Stream B funding

Recommended to CIC, that specifically ISAP — Stream B sector funding for ongoing professional development continue. ISAP — Stream B is working well and needs to continue. There is a benefit to having training and professional development at the sector level, but this does not mean that individual training needs in agencies should not be recognized. CIC, OCASI and member agencies should be involved.

Funders' table

Recommended that CIC take the lead in bringing together all major funders to discuss how:

1. They will share the TCO of technology
2. Standardize reporting
3. Standardize forms
4. Allow for paperless proposals and reports

This should be done in consultation with the sector.

Email work on behalf of clients

Recommended that email work for clients should be gathered in statistics submitted to funders. CIC, in consultation with the sector, should develop a reporting mechanism that recognizes levels of service provided by email. Rationale: email is increasingly the method of communication with colleagues, government, other agencies and clients. Settlement agencies are responsible to ensure integrity and security of email information and for developing their own protocols for uses of emails, response time, etc. (There is recognition of the limitations of email in that it cannot replace face-to-face counseling for some matters; also it is not accessible to all clients due to language and technical requirements.)

(Group 2 recommendations, continued)

Pre-arrival settlement information

Recommended that pre-arrival settlement information provided by email and web-site should be funded separately and statistics should be collected separately. This may be a separate program addressing the need for information before landing in Canada. Agencies need to assign HR and IT resources to providing pre-arrival settlement information to would-be immigrants and advertising settlement services. CIC (including overseas agencies) and settlement agencies should be involved. Agencies should prepare proposals for funding of activities related to the provision of pre-arrival settlement information.

Funding for web-sites as outreach tool

Recommended that a web presence needs to be part of the ISAP Outreach Action Plan and funded accordingly (i.e. become part of the annual budget and contract, with CIC and each agency negotiating according to needs). A web-site provides an additional way for clients to learn about/access services and information. The initial primary focus will be on assisting agencies to develop web-sites, and thereafter assistance with maintenance costs should be provided.

Common database

Recommended that OCASI, with input from the sector, and CIC should develop a database which can be used by agencies in the sector for recording and reporting information necessary for effective management and accountability. The database should allow for cross-referencing within the agency, be flexible, secure, allow for the manipulation of information, and should build upon existing databases. Core information can be common and new components could be added as needed. The reporting of the database needs to reflect the information needs of the agencies. The database will be compatible to generate reports for CIC and funders.

This database should be internal and not shared with the funders. CIC should fund the project, and OCASI and the sector should give their commitment.

Standards for computers

Recommended that OCASI with the agencies and technical consultations ensure standards are set for computers. E.g. set minimum speed capacity for computers. Benefits:

1. We can open each others' attachments and collaborate with each other
2. Prevent computers from crashing

Multi-year funding

Recommended that CIC and other funders promote multi-year funding and fund core operations so that we can better plan for IT and operational costs and services. This can be done by OCASI and its work with the Voluntary Sector Initiative. It can also be coordinated with the Funders' Table.

(Uncompleted sheet)

Technology is an integral part of administration cost in today's settlement services.

Group 3 Recommendations

IT decentralization

Recommended that CIC will support decentralization of IT and allow agencies to manage for their own IT needs. An analysis should be conducted immediately to determine the real technology costs for our agencies by October 31, 2002. This analysis should contain a formula and/or a process by which agencies can establish realistic IT costs. The analysis should provide separate figures for the following TCO components: indirect costs (management/training) and direct costs (hardware, software, technical support, upgrading, maintenance, email and Internet service).

(Group 3 recommendations, continued)

IT sustainability

Recommended that CIC support the long-term commitment to CIC-funded agencies for IT sustainability (multi-year funding).

IT funding for transitional period

Recommended that CIC provide financial resources for a transitional process to a decentralized IT model.

Eligibility criteria for impact of IT

Recommended that CIC recognize that IT has significantly expanded the provision and types of services (i.e. email client support, access to computers by clients). In addition, we recommend that CIC review and revise eligibility criteria due to the impact of IT.

Working committee

Recommended that the sector today at the plenary session form a committee to work towards the implementation of the MICE-2 conference recommendations. The committee composition should represent: geographical area, size of the agency and CIC funding stream. A number of committee members should come from outside of Toronto and members should have direct knowledge of IT issues. CIC is to provide adequate funding to support this committee.

Database

Recommended that CIC and OCASI research and develop or adapt a database that responds to the client case management and statistical needs of agencies. Database requirements are:

- Enter client information only once to create a central client file that all programs can access and that counsellors can update “live”
- Shield client information that might be unnecessary for one program but not relevant to another or that should not go anywhere
- Give agencies a way to “grow” additional chunks to the database as needs change
- Have enough fields to capture any information that agencies may find necessary for management, accountability and to fulfill contact obligations
- Have powerful firewalls to protect all data
- Allow the agency to separate and forward only the fields that it wants to forward, to whoever it needs to forward them to
- Archive system
- Allow for analysis related to services and needs

Group 4 Recommendations

Long-term sustainability of IT

Recommended that CIC take the leadership role to bring in other levels of government and other funders to support TCO for technology use in the settlement sector (with multi-year funding). Actions are:

1. Review the definition of eligible client services
2. Integrate technology costs as part of an agency’s central administration

This should take place within 2-3 years, based on the readiness of agencies. CIC, OCASI, NGOs and other funders should be involved.

1. Bring together other funders and determine the responsibility of each player
2. OCASI to work with NGOs to develop strategies, action plan and definitions to meet with other funders
3. Prepare agencies for funding formula

(Group 4 recommendations, continued)

Database

Recommended CIC support a common approach to build a database system in collaboration with other funders. Database requirements:

1. User-friendly
2. Linked to evaluation/client outcome
3. Modular/customized
4. Agencies should have the option to opt out, if they have the capacity to provide information requested
5. Web-based, so it can be accessed from other locations
6. Build on existing database systems (not to re-invent the wheel)
7. Data collection and report needs to be coordinated between funders re: standardized reporting system among the funders

The database should be completed within 2-3 years, based on the readiness of agencies. CIC, OCASI, NGOs and other funders should be involved.

Implementation:

1. Gather information from NGOs for databases and reporting models. Model requirements of the various players.
2. Form an action committee
3. Determine through consultations

Total Cost of Ownership

Recommended that CIC move towards the suggested \$250 TCO model immediately (ASAP), but re-assess actual costs by including direct inputs from the settlement agencies. Conduct an assessment of the real TCO and system status of agencies; present findings from community to CIC for reassessment of funding formula. CIC should provide funding for the study, OCASI should do the assessment, and member agencies should provide input.

Training

Recommended that CIC provide funding to OCASI to assess training needs of the settlement sector and to create a plan for IT training within the agencies. OCASI will conduct the assessment and establish training options within the next 2 years. Agencies provide input.

Group 5 Recommendations

Agency ownership, control and decision-making around computers and IT

Recommended that:

- Agencies obtain and confirm ownership and decision-making power over the computers and IT in our offices, as well as the information we collect. Our primary duty and responsibility is to our clients and community.
- CIC (OASIS) transfer ownership and control of computers and IT to the sector agencies, (contingent upon adequate funding) by December 2002 for contract negotiation.
- OCASI facilitate a meeting of Boards and Directors to discuss collective action, lobbying and development of common principles and standards for sectoral guidelines.

CIC (OASIS), Boards of Directors of agencies, Executive Directors and OCASI should be involved. They should meet and discuss action, make decisions and take ownership. Can't be advanced unless it is resourced and supported on an annual basis.

(Group 5 recommendations, continued)

Computer, IT and staff training support

Recommended that CIC commit annual support to IT in whatever form. IT and staff training dollars reflective of service demands and the changing client needs. This should be new dollars on the CIC side — not resources from current agency allocation. This should take place within 6-9 months and included in next year's budget. This involves CIC and agencies, the Treasury Board and other funders.

Implementation task force

Recommended that an implementation task force of agencies be formed to work with CIC and OCASI to follow through with MICE-2 recommendations, to deal with and discuss the validity of the RealWorld report and be consulted for the process of establishing Total Cost of Ownership. CIC, OCASI and agencies — collective voice on research, evaluation and implementation of TCO decisions and funding. Cohesive response. EDs, Boards, OCASI and CIC should be involved. CIC should recognize the need for input, approval and needs of agencies. Form a committee, meet, research, discuss and come to an agreement on dollars needed. Bring that information back to the sector. Based on needs and current IT environment.

Common database

Recommended that OCASI and agencies develop definitions, fields and tools for a common agency database that would ensure client confidentiality and flexibility to accommodate the needs of individual agencies. This should take 1-2 years (identify database and test it).

Computer upgrade, software, hardware and support

Recommended that CIC upgrade the computers they have provided within the next six months so that we can start with a clean slate when we move toward TCO decisions and funding for support of settlement in 2003-04. Within 6 months, CIC should undertake to work with agencies and OCASI to evaluate current resources. Agencies establish minimum standards and specifications, software (anti-virus), leading to the establishment of need and uses within agencies. OCASI conduct a survey of these as well as moving towards an IT specifications sheet to present to CIC. Process is: evaluate, set standard, upgrade.

Group 6 Recommendations

Recommended that OCASI take the leadership role in the development and implementation of a sector-wide IT strategy which includes:

1. A capacity building strategy
 - Training strategy
 - Policy, practices development
 - Establish a platform for info/communications exchange
2. MIS model
 - Research and recommend MIS options which are flexible, compatible, accountable and in harmony across organizational, program and funding needs
3. Funding/sustainability plan for IT
 - Research *real* costs
 - Examine models
 - Ensure flexibility
 - Set standards
 - Establish a salary grid for IT

We request that these tasks be completed in time for 2003-2004 contract negotiations.

Group 7 Recommendations

Reframing settlement services

Recommended that the new ways of providing services to clients electronically be counted as legitimate services. Services counsellors provide via email is valid, legitimate service and should get included in service statistics. OCASI should promote this among its membership through monthly newsletters, at Geneva Park Conference, at regional meetings, etc. OASIS should inform program staff so that agencies are not questioned on this practice. Agencies should provide information and training to their settlement staff to give them the flexibility to provide services electronically.

ICAMS (Client Database)

Recommended that CIC withdraw the implementation of ICAMS pending full consultation with SPOs around issues of:

- Purpose of collecting this information
- Client privacy and confidentiality
- Double data entry
- Administrative burden

The settlement sector will work with CIC to develop indicators for measuring the effectiveness of settlement programs.

IT funding structure

Recommended that OCASI be contracted to do an analysis of Real Technology costs for the sector and that \$250/month/workstation be only an interim amount for planning and budgeting, with retroactive effect to April 1, 2002. OCASI should do this analysis within the next six months. Part of the analysis should look at how other social services, such as health and education, plan and budget for IT costs. OCASI members such as COSTI and Woodgreen have done some analysis for internal purposes and should be involved in this process.

More stable funding

Recommended that CIC commit to a two-year funding cycle, like the City of Toronto and the United Way. Do this with reference to the systems those organizations have in place. ISAP and HOST agencies should move to a similar system by [no date given]. ISAP/HOST agencies that also get funding from City and United Way should be involved in this process. There are obvious benefits in terms of reduced administrative burden both at the level of CIC and the agencies — need to attach dollar figures. Agencies will then be able to plan and manage their IT needs better — document cost savings.

IT funding structure

Recommended that costs of managing IT be above and beyond the 15% that is currently given for Indirect/Admin. costs. CIC-OASIS should make changes to 2003-04 applications accordingly. All OASIS program staff should get orientation regarding how to assess these costs.

3.3 Final Plenary — Initial Responses to Recommendations from OCASI and OASIS

Each workshop reporter read aloud their group's recommendations in order of priority. Representatives of OCASI and CIC-OASIS then responded to the plenary concerning recommendations directed to their respective organizations.

OCASI's Executive Director told participants that OCASI was already aware of many of the issues raised at MICE-2, and had discussed them at OCASI's Annual General Meeting and at the first MICE conference. OCASI wants to set up a Working Group to follow-up and monitor the recommendations from the MICE-2 Report. This group would include volunteers from the MICE-2 conference, members of OCASI's policy committee, and OCASI IT staff.

OCASI's Executive Director then focussed on recommendations where participants had indicated that OCASI should take the lead.

- It would be a good idea to do a short research piece on TCO, including information from, for example, the health sector. At the moment, OCASI doesn't know where it will get the funds to do this research. OASIS has already turned down a request. Timelines are tight if the sector wants the information in time to prepare next year's funding applications.
- Some work has already been done related to the Funders' table. There will be a packed agenda, but OCASI hopes to move IT to the forefront. Funding for computerization should not come out of funding for services.
- The first step towards database development in the sector should be an environmental scan of what already exists.
- ICAMS is a project of CIC-NHQ. CIC-OASIS had only one seat on the Advisory Group, and its representative protested against ICAMS. The MICE-2 conference will send another message to CIC-NHQ that the sector is not interested in participating in ICAMS because of concerns about client confidentiality and because the funding for this project could be put to better use elsewhere. The OCASI Board will relay this message.
- The Auditor General and senior staff at the Treasury Board support the idea of multi-year funding, and OCASI is continuing to work on this issue.

OCASI's Executive Director thanked all MICE-2 participants and said she hoped that the discussions would continue after the conference. In this way, members of the sector can support OCASI's work on policy issues.

Mike Battrick then spoke on behalf of CIC-OASIS. He first reminded participants that decisions on the next phase of the Computerization Project had not yet been made, and that the purpose of the MICE-2 conference was for the sector to advise OASIS. He encouraged people to contact him after the conference through his personal email, through OCASI, or the Extranet. He then addressed specific points from group presentations.

- Current contracts state that computer equipment supplied by OASIS is a capital asset. OASIS retains the right to determine the use and disposal of the computers. The next contracts will have more detail to clarify these issues. Regarding use of the computers, Mike referred participants to the Evaluation Report, which recommends against building "silos" of use.
- OASIS is prepared to transfer funds to agencies to cover TCO, but it remains to be determined how funds will be transferred from the OASIS Computerization Project budget to the agencies. It will be necessary to break down the pieces of TCO and decide which pieces will be part of SPO contracts. This has to be in place by March 2003.
- If training is part of TCO, that will impact on the training line on contracts. OASIS doesn't want to pay twice.
- OASIS's position is that services justify funding and this includes non-traditional methods of delivery such as email. OASIS has already made a presentation to CIC-NHQ on this and will repeat the message. However, client eligibility is a matter of legislation and not an issue on which the regional office can make a decision.
- OASIS is working to put together a Funders' table, but it won't happen until the fall. Gillian Kerr will make a presentation to the funders. Operations managers should be sitting at the table with funders.

- The database issue was discussed as early as three years ago at OCASI's Annual Conference. OASIS agreed then that a database was a management tool to track services and to facilitate reporting to funders. This is a complex issue now because of CIC-NHQ's ICAMS project.
- OASIS is aware that agency computers are reaching the late stages of their life cycles. Recently OASIS bought 200 replacement computers. Currently the policy is: if a computer breaks, the agency should call Metafore. If repair is going to be costly, Metafore will call OASIS to authorize replacement.
- If CIC buys, installs, and ships computers, and handles warranties, then that is another example of an element of TCO that will be deducted from the amount transferred to agencies.

3.4 Participant Feedback on the MICE-2 Conference

57 MICE-2 participants completed the participant feedback form, giving a return rate of 70%. A complete summary of responses is found in Appendix Five.

Over 70% of the respondents agreed that each of the three objectives of the conference had been met. They said the conference was most successful in its objective to "look at the essential role of information technology in the overall operations of an immigrant services agency and examine ways of strengthening and sustaining that role" (28% strongly agreed, 64% agreed). The conference was judged almost as successful in its objective to "examine and share ideas to enhance settlement services through effective use of information technology" (21% strongly agreed, 64% agreed). A majority of participants indicated the conference met its objective to "discuss the findings of the RealWorld Systems Evaluation Study and develop forward-looking strategies to advise CIC on future priorities" (26% strongly agreed, 46% agreed).

MICE-2 participants said the conference provided a good opportunity to network and exchange ideas (44% strongly agreed, 51% agreed). About an equal number agreed that they were personally able to contribute to this exchange. Discussing issues with peers was most often mentioned in response to the question about what people liked most about the conference. The overall conference program, that is a series of focussed workshops leading to the development of recommendations, was mentioned almost as often in this regard. A few people (8) had negative comments about the program in answer to the question about what they liked least about the conference, but there was no consensus on the specifics.

To questions specifically about the workshops, respondents gave generally strong positive responses. (Each of the 7 groups was represented by between 7 and 9 respondents.) 23% strongly agreed and 60% agreed the workshops were a good process towards developing recommendations. 26% strongly agreed and 63% agreed that the background material for the workshops was helpful. When asked if their facilitator was helpful to the group in guiding the workshop processes, 37% strongly agreed, and 40% agreed.

Smaller majorities of respondents liked the plenary portions of the conference. Asked about the panel in the opening plenary, 7% of respondents strongly agreed, and 49% agreed that it was informative. There were few write-in comments to explain these opinions, but one person did say they would have preferred to hear success stories from within the settlement sector (that is, not from other NGO sectors). The presentation on the RealWorld Evaluation was judged by the majority to be useful preparation for later discussions (17% strongly agreed, 56% agreed).

Approval ratings for the final plenary were similar — however, in this case the number of "no responses" due to people leaving early (about 25%) was a factor, as only about 14% of respondents did not agree that the final plenary was a good process and well facilitated.

In outlining specifically what they liked least about the conference, other than various aspects of the conference program, participants mentioned meals most often (7 comments). Length and scheduling (too long; too short; too much work in the time allotted) were cited by 6 people.

Overall conference organization was rated positively. Almost everyone agreed that the information sent ahead of time had prepared them for the conference. 23% strongly agreed the conference facilities were ideal, 47% agreed, and 17% were neutral. There were only a handful of negative comments about the facilities or hotel staff. These were more than balanced by an equal number of people who cited conference organization under what they liked most about MICE-2.

26% of respondents strongly agreed, and 56% agreed that the MICE-2 conference was a good use of their time. When asked if the settlement sector would benefit from the MICE-2 conference, 30% strongly agreed, 29% agreed and 23% were neutral. In explanation of these answers, about half of the comments said MICE-2 was useful in itself. The other half said the benefit remains to be seen in the extent to which the recommendations are implemented.

In their suggestions on how to follow-up MICE-2, most respondents said they wanted to see the recommendations implemented (19 comments), and about half of these mentioned the need for a follow-up committee. 8 comments addressed OCASI's role to take issues to the funder and report back to the sector. 5 respondents want more opportunities to stay in touch with each other, either through the Extranet discussion area, or at another conference.

4.0 Recommendations and Next Steps

In the weeks immediately following the conference, the MICE-2 Team reviewed all workshop group recommendations, workshop notes taken by scribes, and feedback from facilitators. An analysis of themes and consensus in these sources appears in Appendix Six.

This work informed the final version of MICE-2 recommendations below. Expedient action is required in working toward changes affecting the next fiscal year. The MICE-2 recommendations will go to OCASI's Board of Directors in September 2002. The Board will decide on a course of action and prepare terms of reference for the MICE-2 Follow-up Committee. (Committee members are listed in Appendix Four.)

4.1 MICE-2 Recommendations

The summary below represents themes that emerged from an analysis of group discussions and recommendations, with a "middle-ground" version of timeframes and responsibilities.

1. Recommended that CIC-OASIS, in partnership with OCASI, convene a Funders' table as soon as possible to discuss the urgent needs of the settlement and immigrant service sector, and in particular new resources to sustain IT.
2. Recommended that CIC-OASIS pilot a two-year program funding period for the settlement and immigrant service sector, beginning in 2003.
3. Recommended that OCASI explore funding to conduct a study of actual Total Cost of Ownership (TCO) in the sector and that OCASI coordinate or conduct such a study. This study should delineate and cost components of TCO; should be based on minimum standards for hardware and software; and should include alternative models of technical support and training.
4. Recommended that CIC-OASIS move to decentralized IT management for ISAP/HOST-funded agencies, as per Recommendation #3 of the RealWorld Evaluation Report, with implementation as soon as possible.
5. Recommended that CIC-OASIS implement an interim per-workstation funding provision to agency budgets, as per Recommendation #1 of the RealWorld Evaluation Report, to coincide with decentralization of IT management.
6. Recommended that OCASI and CIC-OASIS jointly conduct a communications/information campaign to ISAP/HOST-funded agencies in preparation for decentralization. One task of this campaign should be to gather and share best practices of IT management within the sector.
7. Recommended that OCASI conduct a brief survey or consultation on agency capacity and readiness for decentralized IT management. The results of this survey will inform planning for:
 - Strategic capacity building within the sector
 - Centralized assistance (e.g. regional consultants; call-in centres; on-line support)
 - Sharing elements of IT service and/or management among agencies

The study should recommend reasonable time frames and benchmarks for increased capacity and the transition to decentralized IT management. CIC should fund all phases of this initiative and OCASI coordinate its implementation. This should be done as soon as possible.

8. Recommended that OCASI seek funding from CIC-OASIS and other sources, and conduct or oversee a study of the requirements of an information management system that is adaptable for broad application within the settlement and immigrant service sector. This should be a highly participatory process involving agencies and key funders. (This is expected to be a 2-3 year initiative.)

9. Recommended that OCASI support decentralized IT training for the sector. An immediate strategy should be to expand the PET program; or create a parallel program with an IT focus. Ways of delivering decentralized, “just-in-time” IT training or coaching should be a key area for study and planning within all other initiatives — the capacity building strategy, the TCO study, and information management system study.
10. Recommended that a MICE-2 Follow-up Committee, or other OCASI committee, follow-up on the need and support within the sector for OCASI to do advocacy in the area of expanding the definition of eligible clients in light of new ways of providing service through access of online resources, email, and web-sites.
11. Recommended that the MICE-2 Follow-up Committee, with the support of OCASI, design and implement a process to allow for continuing communication on progress on the MICE-2 recommendations.
12. Recommended that the above initiatives make ongoing and innovative use of the Extranet in order to confirm and expand its role in the sector.

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Panelists, Presenters and Panel Moderator — Nancy Friday, AlphaPlus Centre; Gillian Kerr, RealWorld Systems; Ted Richmond, Joint Centre of Excellence for Research on Immigration and Settlement; Shannon Stevens, Ontario Community Support Association.

Facilitators — Pankaj Agarwal, President, ReCubed Consulting; Denise Brooks, Executive Director, Hamilton Urban Core Community Health Centre; Amanuel Melles, Manager, Community Action Unit, Family Service Association of Toronto; Anna Menozzi, Anna Menozzi & Associates Community Consulting; Myrta Rivera-Sahas, Executive Director, Kitchener-Waterloo Multicultural Centre; Lucila Spigelblatt, Deputy Executive Director, Catholic Immigration Centre; Sangeeta Subramanian, Executive Director, South Asian Women's Centre.

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Acronyms

ARS	Automated Reservation System (for LINC)
CIC-NHQ	Citizenship and Immigration Canada National Headquarters
ED	Executive Director
ICAMS	Immigration Contribution Accountability Measurement System
ISAP	Immigrant Settlement and Adaptation Program
IT	Information Technology
JSW	Job Search Workshop
LAN	Local Area Network
LINC	Language Instruction for Newcomers to Canada
MIS	Management Information System
MTCU	Ministry of Training, Colleges and Universities
MICE	Managing in a Computerized Environment
NGO	Non-Governmental Organization
NIC	Newcomer Information Centre
OASIS or CIC-OASIS	Ontario Administration of Settlement and Integration Services (Ontario regional office of CIC)
OCASI	Ontario Council of Agencies Serving Immigrants
OCSA	Ontario Community Support Association
ORLAC	Ontario Region LINC Advisory Committee
PET	Professional Education and Training
SEPT	Settlement and Education Partnerships in Toronto
SOSC	Settlement.org Steering Committee
SPO	Service Provider Organization
SWIS	Settlement Workers in Schools
TCO	Total Cost of Ownership
TL	Technical Liaison
VSI	Voluntary Sector Initiative

**Managing in a Computerized Environment — MICE-2
Final Report**

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Appendix One Conference Resource Materials

1. Detailed Conference Agenda

Wednesday, June 12, 2002	
10:00 a.m. – 10:15 a.m.	<ul style="list-style-type: none"> • Welcome and Opening Remarks Debbie Douglas, Executive Director, OCASI Elizabeth Gryte, Manager, Settlement Programs, Settlement Directorate, Ontario Region, CIC-OASIS
10:15 a.m. – 10:55 a.m.	<ul style="list-style-type: none"> • Panel: <i>Success Stories – Computerization to Serve Communities</i> Nancy Friday, Coordinator of AlphaRoute – Online Learning Environment, AlphaPlus Centre Shannon Stevens, Director of Service Development, Ontario Community Support Association (OCSA) • Question and Answer Period Panel Moderator: Ted Richmond, Chair, Settlement.org Steering Committee; and Administrative Coordinator, Joint Centre for Research on Immigration and Settlement
10:55 a.m. – 11:55 a.m.	<ul style="list-style-type: none"> • Evaluation Report on the OASIS Computerization Project Gillian Kerr, RealWorld Systems Inc. Introduction of Gillian Kerr: Mike Battrick, Program Consultant, CIC-OASIS Moderator, Question and Answer Period: Debbie Douglas
11:55 a.m. – 12 noon	<ul style="list-style-type: none"> • Information on Conference Workshops/Logistics
1:00 p.m. – 3:00 p.m.	<ul style="list-style-type: none"> • Workshop 1: Use of Information Technology (IT) to Improve or Expand Client Services
3:45 p.m. – 5:45 p.m.	<ul style="list-style-type: none"> • Workshop 2: Planning for Long-Term Sustainability of IT
Thursday, June 13, 2002	
9:00 a.m. – 12 noon	<ul style="list-style-type: none"> • Workshop 3: Sector-Wide Forward-looking Strategies to Advise Funders
12:30 p.m. – 1:30 p.m.	<ul style="list-style-type: none"> • Self-Help Online Technical Support Network Presentation on the Volunteer@ction.online Program: Ahmed Ali, OCASI
1:30 p.m. – 2:30 p.m.	<ul style="list-style-type: none"> • Policy Outcomes and Recommendations • Awards and Prizes
2:30 p.m. – 3:15 p.m.	<ul style="list-style-type: none"> • Initial Responses from OCASI and CIC-OASIS • Follow-up on Strategies and Recommendations
3:15 p.m. – 3:30 p.m.	<ul style="list-style-type: none"> • Conference Feedback Forms • Adjournment

2. Some TCO Links (as of May 16, 2002)

(This resource was emailed to MICE-2 participants prior to the conference, and also posted at the discussion forum.)

The following are extracts from a few articles introducing the concept of Total Cost of Ownership (TCO). There are thousands of links on the Internet referring to some aspect of TCO. The URLs below are suggestions of a few places to start for more detailed research.

Technology Budgeting Basics – By John Kenyon

<http://www.charityvillage.com/charityvillage/research/rofr28.html>

Today, more than ever, nonprofit organizations depend on effective use of technology. One of the challenges is to develop a budget that accurately reflects not only the initial cost of a computer system, but all related expenses. To make certain that your computer systems remain an efficient tool for your agency, a basic understanding of the technical and economic realities is necessary.

Check Your Expectations

When it comes to computer systems and information technology (IT), the issue for many nonprofits is one of understanding and expectations. Too often, we treat computer purchases as a one-time expense. That is to say, you buy it, and you forget about it. This is not a cost-effective measure for the purchase of a computer system. Computer systems require maintenance and support. An appropriate analogy might be the purchase and maintenance of a car. Regular maintenance and minor repairs are necessary -- and expected -- to keep a vehicle operating smoothly. In addition to the gas needed to run the car (not to mention the yearly expenses of licensing and registration), repairs and tune-ups are needed to avoid a serious breakdown. In the long run, changing the oil every 3,000 miles will cost less than a complete engine overhaul.

Preventive Budgeting Essentials: 70/30 Rule

With the ever-increasing rate of change in technology, the state-of-the-art machine today will only be cutting-edge for a few months, and close to obsolescence in two to three years. Keeping up with technology is undeniably expensive, but there are strategies to minimize expenses and prevent surprises from decimating your budget. One should consider the Total Cost of Ownership (TCO) when purchasing computer systems. Only thirty percent of the total cost of owning a computer system is the initial purchase of hardware, software and peripherals. Seventy percent of the ownership cost goes to technical support, repairs, training and upgrades. As systems get larger and include networks, email, Internet access and more complex databases, the yearly cost for just one computer can run close to \$10,000 (when you include the salaries of technical support people and lost productivity due to breakdowns). It is important to note, therefore, that if a computer system costs \$3,000, maintaining the system will likely cost you at least \$7,000 -- and possibly more.

Budget for Computers Every Year

Computer hardware should be classified as a yearly budgeted expense. Even though computers need to be replaced at least every three years, not all of them need to be replaced at the same time. Some will merely need maintenance. Subsequently, if you annually allocate money (e.g. \$1,000) for each workstation, you will be able to purchase new computers for about a third of the office each year. You will also be able to maintain systems that are not being replaced. Preventive budgeting and maintenance can help keep these costs to a reasonable level, but there are other ways to keep costs down:

Train Yourself and your Staff

Knowing how to use a computer and software correctly will improve your daily productivity. In addition, if a board member asks if you can give a report combining the budget with the program database, you'll know if this is possible.

Get a Systems Administrator

If your organization has over 10 people, or is heavily dependent on a database for key operations, consider hiring a part-time Systems Administrator, or at least include technical support in one staff member's job description. One ratio to use is one half to one full hour per week per employee for basic systems. Larger organizations or more complex systems (networks, email servers, etc.) will require more of a person's time. Apart from assisting staff with computer related issues and troubleshooting, the individual can also keep the organization up to date through training and research.

NB: This is an extract from the full article at the URL above. All figures are in U.S. dollars.

From IBM-Canada Website: <http://www.pc.ibm.com/ca/tco/index.shtml>

If you're in the market for new PC equipment consider this: purchase price may only account for up to 20% of a PC's Total Cost of Ownership. Yet many purchasers focus exclusively on that 20%, ignoring the thousands of dollars they'll spend supporting networked computers in the long run.

TCO is a concept developed by GartnerGroup to reveal all of the hidden costs in a corporate IT environment. Your initial purchase price is just the tip of the iceberg. The annual investment required to deploy, manage, support, and (ultimately) retire a PC significantly exceeds the PC's initial purchase price.

From Compstar Technology Website: <http://www.compstar.com/TCO.htm>

Total Cost of Ownership

What is "Total Cost of Ownership"? In short, it is a recognition that there is far more to the "cost" of a personal computer than its initial purchase cost. In fact, the purchase cost of the PC usually represents only a small fraction of the total cost of using and supporting that PC over its lifetime.

The Gartner Group, a consulting firm, has been a leader in calculating the total cost of PC ownership in various environments. Typically, they estimate that this cost is a stunning \$11,000 to \$12,000 (US\$) per year! At first glance, this might seem to be impossible for a piece of hardware that only cost one or two thousand dollars to begin with.

IT Best Practices

Best practices ensure the proper deployment of technology, integrated with process and management practices that deliver maximum usable functionality at minimum cost. Best practices are achieved through the proper application of technology or TCO enablers.

The GartnerGroup TCO Manager model is based on the results of hundreds of client engagements. These engagements allowed GartnerGroup to define the best practices common to all IT infrastructures and that are essential to reduce IT costs.

In the chart below, Compaq has emphasized the best practices slightly differently than GartnerGroup's TCO Manager. In particular, we have focused on measurable practices rather than those more subjective in nature (e.g., capacity planning, time spent planning vs. implementing, SLA tracking).

Technology Improvement
Asset Management Process Improvement
System Management People Skills Improvement
Server-Based Client Image Control
User State Management and Restore User Management

Automated Software Distribution
Standardization User Training
Service Desk IS Training
Managed PCs IS Staff Highly Motivated
Scalability Stable IS Organization
Business Protection

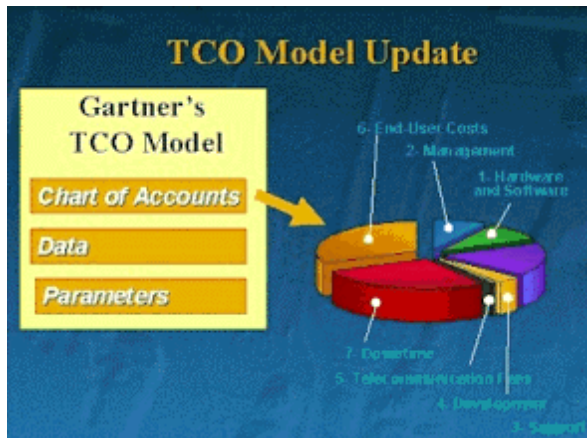
Best practices are the agents of change that your enterprise will need to implement.

From Microsoft Website: <http://www.microsoft.com/mspress/business/TCO/>

Interactive Training White Paper: Reducing Total Cost of Ownership

The Value of Training

Taking a bite out of TCO



The new GartnerGroup TCO Model was developed to help enterprise managers manage budgeted (direct) and unbudgeted (indirect) costs for IT components. In this research, as in other research, "nearly 25 percent of GartnerGroup's PC LAN TCO model has cost elements associated with end user training or the lack of it" as part of the total cost of deploying and owning computers.

3. **Background Information Sheet for Workshop 1**

Service Changes Due To Computerization (As Identified by the Sector)

1. **Searching information on the Internet for clients.** Viewed by many as major change, some people have suggested that EDs should develop effective research methods, insisting that this is legitimate “settlement work”.
2. **Use of Email for follow up and referral services.** This is can only be done if clients have their own computer and if they have a high level of English or a first language that the agency can support.
3. **Online interactive services (if funded) using agency website or Settlement.org.** Some agencies are considering interactive technology in service provision. Others fear that online services will widen the gap between affluent and less advantaged newcomers and make funders support online services to the detriment of clients and agencies.
4. **Possible service partnerships that IT can support.** Some agencies are thinking about partnership opportunities with other providers to offer holistic services involving local community agencies. Some spoke about establishing Virtual Centres to deal with “Finding a job” partnering with ERCs, “Dealing with Housing” in partnership with Information Centres, or “Finding a Family Doctor” with assistance from Heath Centres, etc.
5. **Provide access to computer for clients and community members.** Agencies have a computer for this use and clients are expected to use it on their own. Regardless of the type of funding agencies receive from CIC, staff help on demand or offer group sessions on computer use, Internet surfing, use of job board, etc. The computer for this use is, in many cases, obsolete, and one computer is inadequate to respond to the increased demand.

Related comments and suggestions provided by the sector (from 1 to 5)

Funding for services and technology is inadequate. IT offers new opportunities but, to take advantage of them, the sector needs a redefinition of “settlement work” and a new funding approach for services and technology.

- Assisting clients and community members to use technology is speeding up the settlement process. CIC, in partnership with other funders, should update and provide more computers, recognize that the support offered by agencies is crucial settlement work and pay for it (some agencies are opposed to more computers without funding for support services).
 - Redefine “settlement work” & CIC program goals due to how IT is transforming our services
 - Convince CIC to bring together other funders at a ‘Funders’ table” to negotiate how settlement services and IT can be funded in a co-ordinated and more holistic manner.
6. **Common Client Database.** The sector would like to have a common client database to improve client services, generate reports for funders and develop a set of principles to protect clients’ confidential information.

Related comments and suggestions provided by the sector:

- Create a committee to research and propose a database that the sector can adopt
- Request that OCASI support the above committee’s work and that CIC funds the committee for research and adaptation.

From RealWorld Report: “The settlement sector now relies on computers to serve clients effectively and to accomplish its service objectives”(pg.13).

“Using computers in work with immigrants and refugees enhances the agencies’ capacity to serve constituents (pg. 14- followed by a list of client computer usage)

4. Workshop 1 Resource

(The following database requirements for agencies in the sector were identified during the MICE-2 online discussions, and this list was posted by facilitators during Workshop 1.)

Database Requirements

- Enter client information only once to create a central client file that all programs can access and that all counsellors can update “live”.
- Shield/hide client information that might be necessary for one program but not relevant to another or that should not go anywhere.
- Give agencies a way to “grow” additional chunks to the database as needs change.
- Have enough fields to capture what agencies find necessary for management and accountability and to fulfill contract obligations.
- Have powerful firewalls to protect all data.
- Allow to separate and forward **ONLY** the fields that an agency wants to forward to whoever.

5. **Background Information Sheet for Workshop 2**

Planning for Long-term Sustainability of IT

1. IT funding structure

The ability to plan for technology as an administrative cost of doing business is favoured by many agencies. They have considered different options, most involving de-centralization. Some agencies are in favour of IT planning and management at the agency level, with the option of forming regional groups to increase their purchasing power when contracting technical services (technical support, internet servers, etc.) Others would prefer to continue with a centralized system. Budgeting for the cost of technology on an annual basis is common in the private sector. This process is known as planning for the Total Cost of Ownership (TCO). Based on this process, RealWorld recommended that CIC de-centralize its IT funding, so agencies can plan and be funded directly for the information technology they need (See RW Executive Summary, page.6).

2. Total Cost of Ownership Components

TCO is a concept devised to reveal all hidden costs in an IT environment. The purchase price is just an initial investment. The annual investment required to deploy, manage, support, and retire a PC significantly exceeds the PC's initial purchase price. The TCO main components are:

- Hardware & Software (purchasing/leasing)
- Technical support
- Upgrading and maintenance
- Training and Management cost
- Internet and Email server

Related comments and suggestions provided by the sector

- Effective planning can only be done if agencies can count on stable funding. The sector should work toward achieving multi-year funding arrangements as a long-term solution.
- CIC should create a "Funders' Table" to involve other funders in a dialog to adopt a "Co-operative Funding Approach" to adequately fund IT in the sector.

3. Staffing and Technical Support

Agencies identified the need for different staffing and technical support arrangements. Training Liaisons (TLs) cannot perform their principal jobs and manage technology at the same time. Most agencies recognize that someone internally should be responsible for Local Area (LAN) basic administration, but the present arrangement does not work.

Related comments and suggestions provided by the sector

The sector discussed two main options based on the de-centralization of IT funding.

- Sharing an IT staff (preferred by agencies in large urban areas)
- Contract to contract two types of technical support, one based on fee for services for routine LAN management (mid technical level) and one at a high troubleshooting level to be contracted as needed (preferred by isolated agencies).

4. IT Training

At this stage agencies recognize that coaching is preferable to classroom training for some skills (and vice-versa), and that self-directed learning works well in certain circumstances, and that it is not for everyone. Some agencies see IT training as one component of the sector professional development requirements, not to be included in the total cost of ownership.

Related comments and suggestions provided by the sector

- CIC should support an IT training system to respond to the needs of staff in various positions (EDs, managers, counsellors, etc.). This system should be flexible enough to allow new staff to access it for appropriate training requirements and to enable existing staff to train on new technology.

6. Workshop 2 Handouts

IT Training System/Module

1. Training for New Staff

The first step is to assess an individual's present level of proficiency with hardware and software used by your agency. EDs/managers will need training and/or tools to do this assessment. The individual will then need training to reach the required levels of proficiency – these should be defined for each agency's specific equipment and applications.

2. Training for New TLs

New TLs are usually current staff who have been "Assistant TLs" or who are otherwise familiar with most or all of your agency's computer system. There is a high TL turnover in our agencies (50% or more per year), making TL training a constant necessity in the sector. One-on-one coaching was used successfully during the TL training project of early 2001. This may cost \$1,000 minimum (based on a week of coaching at \$200 per day).

3. Training for Managers

Managers received initial technical training early in the computerization project. MICE-1 was a day and a half conference with workshops on managing in a computerized environment. At the MICE 1 conference, participants strongly suggested that training for managers should be offered in a more consistent way. Some key training areas that were identified included:

- * Creating and maintaining a sound computer infrastructure
- * Managing service changes due to computerization
- * Budgeting for the Total Cost of Ownership
- * How to assess training and staff development needs

4. Training for Upgrades

When new hardware or software is installed, everyone in your agency will need training. Some training may be specific to a job category – especially TLs. Training for other staff groups may need to be tailored for different areas of focus or different levels of depth.

Training Methods for All Four Training Areas

When choosing training or developing a plan, training providers and agencies should identify which methods would work best for each training area and for each individual, depending on personal learning styles. This identification in itself requires training. The most common methods are:

- * Classroom training
- * Small group training
- * One-on-one coaching
- * Self-directed learning
- * An appropriate combination of the above for complex areas

TCO Cost Accounting Checklist

1. Survey and Analyze Your Current Computer System

- a) Evaluate working conditions and life expectancy of individual system components
- b) Determine what needs to be replaced, upgraded, or refurbished every year
- c) Forecast internal (staff time) and external (technical advisors) costs
Helpful question: "What can break down this year?"

2. Identify Changes Needed

- a) Determine technology choices
- b) Collect quotes
- c) Select credible vendors and support services
- d) Determine internal (staff time) and external (technical advisors) costs
Helpful tip: If you or your TL doesn't understand it, don't buy it.

3. Costing of Purchases, Procurement, Leasing and Logistics

- a) Determine the cost of each component chosen
- b) Physical and technical set-up requirements (cabling, wiring, hubs, time to re-enter data, etc.)
- c) Extended warranty
- d) Assembling hardware
- e) Loading software packages
- f) Testing and Q&A hardware and software
- g) Forecasting internal (staff time) and external (technical advisors) costs for this phase
Helpful tip: Think about hidden costs that nobody gives you quotes on: cables, electrical wiring, etc.

4. Forecast Training Costs

- a) Cost of coaches, training providers and/or of educational institution courses
- b) Cost of "On the job training/mentoring" provided by existing staff and/or TL(s) in terms of staff time (mentors and learners)
- c) Cost of "self-directed learning" in terms of staff time spent practising on the new technology and cost of learning material (tutorial, CD, Online interactive courses, etc.)
- d) Forecast internal (staff time) and external (technical advisors) costs to put the training plan together
Helpful tip: Consider a sectoral training approach via OCASI (as private sectors do with their professional associations)

5. Costing of Management and Ongoing Operations

- a) Internet and other servers – ongoing technical support services
- b) Everyday user administration
- c) Equipment maintenance
- d) Service contract agreements (e.g. technical support, internet server, etc.)
- e) Ongoing end-user and network staff training
- f) Consumable supplies (printer cartridges, diskettes, etc.)
- g) Equipment insurance
- h) Contingency costs (virus cleanup, restore data, reinstallation, setup modification, etc.)

7. Workshop 3 Resource

(Facilitators posted this list during Workshop 3.)

Suggestions from Online Discussions

- Ensure that there are cohesive responses to the evaluation report.
- Encourage CIC to create a “Funders Table” to integrate IT funding and support settlement services co-operatively.
- Support OCASI in its work with the “Volunteer Sector Initiative” to promote multi-year funding (CIC and others) so that we can better plan for IT and service delivery.
- Strengthen the sector’s “collective voice” for advocacy and policy directions related to IT support and program funding.
- Explore how we can use IT and the Extranet in support of collective actions.
- Form a “MICE 2 Recommendation Follow-up Committee” to work with OCASI toward the implementation of our recommendations.

8. Opening Plenary

The complete *Final Report of the Evaluation of the OASIS Computerization Project* is downloadable from the Settlement.org Extranet at:

http://extranet01.settlement.org/sys/library_detail.asp?passed_lang=EN&doc_id=1002950

The Evaluation Report made four major recommendations to OASIS.

1. CIC should adopt a per-workstation funding formula to support the technology infrastructure of the settlement sector. This funding should be provided directly to the agency as part of operating costs. An analysis should be done immediately of real technology costs for the sector, using a Total Cost of Ownership approach. In the meantime, CIC and agencies should begin planning and developing a process using a minimum of \$250/month per workstation for ISAP/HOST-funded agencies and a minimum of \$100/month per workstation for LINC computer labs, reflecting their simpler requirements.
2. Agencies should be assisted as they prepare to integrate technology into their operating costs and functions. For those agencies that require it, some central assistance in the form of guidance, advice and guidelines is necessary (although some agencies may opt out). An Information Technology Consultant should be funded to locate and develop resources that can help agencies manage their own systems. The consultant would not provide direct technical support.
3. Individual agencies should manage their own technology services, using a coordinated approach that is directed within the agency by a designated senior staff person. As part of the expectations of per-workstation funding, the agencies must provide access to computers for ISAP/HOST program staff, offsite back-up of organizational information, reliable and virus-scanned email, and Internet access to staff. Technical support should use clear escalation, tracking and monitoring processes, drawing on the Technical Liaisons, the I.T. Consultant, and service level agreements that make performance expectations clear, easy-to-evaluate, and manageable.
4. The Settlement.org Internet site should further define the needs of its key audiences and continuously revise the site to increase its effectiveness. Settlement.org has two primary audiences — immigrants and settlement staff. We recommend that Settlement.org carry out regular usability assessments of representative users and ensure that the site can be effectively used by its key target groups. For example, Settlement.org may consider posting a simplified sub-site for users with low English literacy skills and little Internet expertise. For settlement staff, Settlement.org may develop navigation around key work processes and incorporate the site into training session relating to counseling. Further Settlement.org should consider what functions it can drop in order to free up resources for higher priority activities. We suggest in particular that the Extranet be minimized to reduce administrative load. Finally, to meet the needs of new immigrants, CIC should consider a promotional and public relations strategy to bring members of the public to the site.

Gillian Kerr referred MICE-2 participants to an article she wrote for CharityVillage.com, *The real costs of technology: what agencies and funders should be paying for computers*, found at:

<http://www.charityvillage.com/charityvillage/research/rtech19.html>

Appendix Two Online Discussions

Online discussions on topics relevant to MICE-2 took place at the Extranet for approximately nine weeks prior to the conference (from April 8 to June 11, 2002).

Participation Statistics

By June 11, the day before the conference, the MICE-2 Discussions had been open for about 9 weeks. 29 agency representatives had made 101 posts, with participation rates shown in the chart below.

Number of Agency Contributors	Posts per Contributor	Total Posts
13	1	13 contributors x 1 post each = 13
2	2	2 contributors x 2 posts each = 4
4	3	4 contributors x 3 posts each = 12
2	4	2 contributors x 4 posts each = 8
1	5	1 contributors x 5 posts each = 5
2	6	2 contributors x 6 posts each = 12
2	8	2 contributors x 8 posts each = 16
1	9	1 contributors x 9 posts each = 9
2	11	2 contributors x 11 posts each = 22
Total = 29		Total = 101

This chart indicates that frequent contributors, that is those who made more than 5 posts, contributed 59 messages, over half of the total.

Almost half of the 29 participants joined the discussion in the first 2 weeks: as of April 19, there had been 14 agency contributors. In the next week, 4 new contributors posted. Throughout the month of May, a few regular contributors continued to post, while new contributors slowed to 1 or 2 each week. In addition to the 29 people noted above, 2 agency representatives made “test” posts (that is, with no content) that were removed by themselves or the moderator.

Many posts from agency representatives had substantial content; some were brief or informal replies. At the moderator’s urging, a couple of people went online just for the experience and to say “hello” to their colleagues.

23 of 29, that is 79%, of online discussion participants from sector agencies also attended the MICE-2 conference.

The chart below shows the 19 active topics at the MICE-2 Discussion forum as of 11:00 a.m. on June 8, 2002.

	Topic	Total Posts	Read	First Post	Last Post
	Options for Technical Support	10	159	April 25	June 5
	Standard Client Database and MIS	33	400	April 18	June 4
*	Technical Liaison Needs Help!	2	31	May 30	June 2
	MICE-2 Fun Bowling Tournament	2	41	May 28	May 30
*	Client Database/Management System for ISAP/HOST	2	65	May 27	May 29
	Your Impressions of RealWorld Evaluation Report	8	92	May 22	May 29
	What are New Issues for Staffing and Training?	29	417	April 5	May 25
*	And, Speaking of Funding...	27	332	April 8	May 24
*	Why LINC is Not Invited to the MICE-2 Conference?	2	34	May 23	May 24
	What Will Settlement Work Look Like in the Future?	25	427	April 5	May 21
*	CIC-Metafore Support for 2002-03	5	138	April 15	May 16
*	Black Box Computer (ICAMS)	11	142	April 17	May 16
	How Do We Strengthen and Sustain IT Systems?	21	276	April 5	May 15
	Online Discussions — General	10	178	April 11	May 13
	Super Prizes for Participation Online	6	71	April 16	May 8
*	JSW	9	176	April 8	May 8
*	Volunteers and Technology	1	21	May 8	May 8
	Executive Director Burn-Out	1	29	May 2	May 2
*	Freigate and the Slowest Connection on Earth	9	112	April 16	May 1

Notes:

1. This chart uses the Extranet protocol that lists topics within the forum by date of the most recent post.
2. The figures in this chart include postings by agency representatives, MICE-2 Team members, and OCASI staff. One posting by an agency representative under “What Will Settlement Work Look Like in the Future?” was made on June 11 and is not included in this chart.
3. The Extranet lists “Replies” to the original message under any topic; therefore 1 was added in each case to show the number of “Total Posts” for each topic.
4. * indicates a topic opened by an agency representative.
5. Occasionally, a participant posted the same message twice, or used the “reply to this message” function without adding new content. Such postings were removed by the moderator and are not included in the figures above.
6. Figures in the “Read” column include multiple visits by any one participant and typically changed often during any day. They are useful for comparing the readership of the different topics.

The most active MICE-2 topics were:

Topic	Total Posts
Standard Client Database and MIS	33
What are New Issues for Staffing and Training?	29
And, Speaking of Funding...	27
What Will Settlement Work Look Like in the Future?	25
How Do We Strengthen and Sustain IT Systems?	21

(The next most active topic had 11 posts.) The five topics with the most posts were also the most often read, as shown below.

Topic	Read
What Will Settlement Work Look Like in the Future?	427
What are New Issues for Staffing and Training?	417
Standard Client Database and MIS	400
And, Speaking of Funding...	332
How Do We Strengthen and Sustain IT Systems?	276

(The next most-read topic had 178 reads.)

Progression of Discussion and Summary of Topic Themes

Informed by the document review conducted by the program designer, the MICE-2 Team selected three topics to initiate the MICE-2 Discussion Forum:

1. What are New Issues for Staffing and Training?
2. What Will Settlement Work Look Like in the Future?
3. How Do We Strengthen and Sustain IT Systems?

OCASI announced to agencies that the MICE-2 forum was open as of April 8.

What are New Issues for Staffing and Training?

The moderator opened discussion by asking:

- Will IT become a basic competency for hiring at all levels at your agency?
- How will this affect the way you recruit, hire and evaluate?
- How will your agency incorporate IT into the culture of lifelong learning?

All agency respondents agreed that workers in the sector now need at least a basic level of IT competency. Managers will look for this in new hires, otherwise the agency takes on too much human resource development.

With regard to training for existing staff, an exchange of messages discussed the problems and expense of unfocused or unnecessary training. One participant shared strategies for just-enough, just-in-time training. Anna Menozzi of the MICE-2 Team reported that one-on-one coaching had been preferred in her experience with training TLs.

One ED received information from other participants about multilingual fonts. There were a number of posts to give and clarify information on OCASI's Professional Education and Training (PET) program. (PET does not have an IT focus, but may be used to fund IT training for new staff in some cases.)

What Will Settlement Work Look Like in the Future?

The moderator began this topic with the questions:

- How much do we react to technology?
- How much are we architects, using IT to shape our services?
- How can our sector use the full potential of IT?

In later postings, the moderator introduced some relevant findings of a recent study of IT in the non-profit sector in the UK. Anna Menozzi asked questions about redefining settlement work in light of the challenges and opportunities of IT.

Several messages suggested that the settlement sector was behind other sectors in entering the computer age and didn't yet have the perspective to look at all the impacts of IT. Insufficient funding was identified as the reason for this. The longest exchange under this topic dealt with the benefits and challenges of email.

How Do We Strengthen and Sustain IT Systems?

The opening message asked:

- What are the IT needs for our agencies — in the short term and in the long term?
- What models of technical support best suit our needs? What will these cost?
- Where should these dollars come from?

EDs responded that the computers bought by OASIS are now nearing the end of their useful lives. They don't handle the latest versions of software and they are prone to technical problems. The moderator referred readers to resources that say that the useful life of a computer is typically just three years, and the Total Cost of Ownership (TCO) may be 3-4 times the original cost of the equipment.

Participants wanted to use MICE-2 as an opportunity to tell CIC-OASIS that it should fully fund technology in their agencies. Debbie Douglas said agencies could be even more proactive by budgeting their IT costs, and taking that information to all their funders. A communiqué from Mike Battrick of OASIS, posted at the Extranet on April 25, outlined an interim plan for technical support during the transition year 2002-03. This provided an opportunity to remind participants to consider long-term solutions.

One contributor to this topic outlined specific IT needs of the settlement sector, with a view to enhancing client services. This same person introduced the idea of setting up an IT development and sustainability committee with sector-wide representation.

The last message under this topic was posted on May 15. However, the discussion of funding continued under several other topics.

And, Speaking of Funding...

An ED introduced the topic of advocacy on behalf of agencies that provide settlement services but do not receive funding from the federal government, in particular CIC. Debbie Douglas replied, agreeing that this was an issue for almost 50% of OCASI's membership. She reported on ongoing efforts on their behalf.

Other contributors discussed the need for the sector to speak and act collectively on funding from federal, provincial and municipal governments. Debbie Douglas checked in regularly with responses outlining OCASI's position and actions on this front.

One exchange concerned the need for multi-year funding in the sector, allowing agencies to plan and manage more effectively. OCASI has been working on this issue through the Voluntary Sector Initiative.

JSW

This topic was started by the same ED who introduced *And Speaking of Funding...*. Her initial post said she was grateful that JSW agencies were part of MICE-2. She requested information from other agencies, particularly in smaller centres, on how they have helped their clients with job search in a computerized environment.

Messages under this topic discussed developing and promoting a web-site that posts résumés; also, the use of agency computers by clients for Internet job searches. This area was not one of the most active, but offered some practical information to readers.

Online Discussions — General

The MICE-2 moderator introduced this topic for general information and housekeeping items. He posted some hints on writing for the discussion area. After some would-be posters experienced difficulties, he explained how to deal with Extranet “freeze-ups”. One agency contributor posting under this topic asked for help with checking on the progress of immigration applications. OCASI supplied the URL for an online source for this information.

CIC-Metafore Support for 2002-03

An ED began this topic with a request for information about the status of warranties and software licenses. (Metafore is the firm contracted to provide technical support for the Computerization Project.) He also asked about the possibility of CIC-OASIS providing upgraded equipment. Howard Sinclair-Jones, a member of the MICE-2 Team and the Project Advisory Team, supplied some information about OASIS’s current commitment, pending the completion of the Evaluation Study and the MICE-2 recommendations. Within 10 days, Mike Battrick of OASIS released a communiqué about the interim plan for repair and replacement of computers and the moderator supplied the link for the Extranet page. Several weeks later, the Settlement.org Web Coordinator informed readers that OASIS had updated the information.

Super Prizes for Participation Online

The moderator announced there would be awards of merit and prize draws for participation in online discussions. There were light-hearted responses.

Freigate and the Slowest Connection on Earth

In only a few posts, this area touched on a number of issues. The ED who opened this topic had two questions. She was dissatisfied with the Freigate system and wanted to know if it would be replaced. Responses indicated that Freegates were breaking down in other agencies, and no replacement parts were available. OCASI informed the sector that warranties had expired and there was no more technical support. Plans to replace Freegates were in development.

The other topic in the opening post concerned integrating computer usage, so there wouldn’t be one computer per program. One particular complaint was that LINC’s ARS uses a high-speed connection, but the rest of the office must use the slower Freigate connection.

In her responses, Debbie Douglas mentioned the PET program with regard to training for Technical Liaisons (TLs); and also the issue of a single database to use for reporting to funders. See the next two topics for more discussion about databases.

Black Box Computer (ICAMS)

An ED opened this topic to ask for reactions from the sector to the Immigration Contribution Accountability Measurement System (ICAMS) computers. Her main complaint was that her ARS,

ICAMS and OASIS computer systems had different software and hardware configurations. This meant that workstations had dedicated uses, which seemed to her an uncoordinated approach by the funder. Respondents agreed that the ICAMS computers were a waste of money. Debbie Douglas explained that the ICAMS computers reflected a decision by CIC-NHQ. She urged members of the sector to speak out together on this issue.

A couple of postings here touched on the issue of sector-developed databases. The moderator picked these up and used them to begin a new topic, *Standard Client Database and Management Information System (MIS)*.

By mid-April, the MICE-2 Team, informed by the ongoing needs assessment conducted by Anna Menozzi, identified two additional “action themes” — *Standard Client Database and MIS* and *Options for Technical Support*. The moderator introduced these in successive weeks.

Standard Client Database and MIS

This topic became the most active in the MICE-2 discussion forum. Under the topic of ICAMS, contributors had already begun to discuss issues related to funder-imposed database systems.

Posters uniformly agreed that agencies in the sector could benefit from a powerful application to manage information, developed specifically to meet their needs and priorities. Issues under this topic included:

- A database should allow individual agencies to track information for the purposes of planning and managing their programs. Funders’ reporting requirements would be accommodated, but wouldn’t drive the design.
- Agencies should enter data once only on any client, even if that client receives services under several funding programs. (Currently some agencies have to enter data more than once to accommodate funding or accountability programs.)
- A database application should be highly flexible, allowing for the growth of an agency. It should allow information fields to be hidden or shielded if they are not used for a certain program, or if it is not appropriate to share them with certain audiences (funders, Boards, community, staff).
- A database should have a firewall to protect information about clients.
- Some agencies have already developed databases. The sector should review these to discover “best practices”.

Agencies are concerned about security and client confidentiality under funder-imposed tracking systems. Debbie Douglas said these were policy priorities for OCASI, but OCASI needs greater support from its membership.

Options for Technical Support

The moderator asked participants how well the current model of technical support was working. Those who responded said it needs improvement. TLs are working longer on technical issues, which takes time away from their regular jobs. One ED thought the agency could use a full-time technical person; another ED was her own TL. Their agencies were struggling to maintain basic functions, such as email.

Regarding Metafore, the firm providing central technical support, one respondent said that they didn’t respond promptly. Another said that Metafore was often “stumped” by the agency’s technical problems. An ED in a community far from Toronto said that they never saw Metafore. They received parts and did the repairs themselves.

A couple of agencies use volunteers with technical expertise, but participants agreed this was risky, and not a reliable system for the sector. This exchange turned the discussion to funding for technical support, and the need to articulate to funders the essential role of technology in delivering client services.

Executive Director Burn-Out

The moderator relayed the content of an email from an ED, and urged the sector to use the Extranet to overcome isolation. There were no responses.

Volunteers and Technology

An ED asked how others in the sector used volunteers to support IT. There were no responses.

Your Impressions of RealWorld Evaluation Report

Shortly after the RealWorld Evaluation Report was released at the Extranet, the moderator posted the link and informed MICE-2 participants the report was required reading for the conference. He urged them to give their initial feedback online.

Five agency representatives responded. Overall they felt that the report reflected the concerns of the sector.

3 of them said that the recommended funding of \$250 per ISAP workstation per month seemed low. If agencies need to replace computers out of that amount, they will need to reserve money each month. Software is expensive. Many staff need training. One person noted that the Evaluation Report said that managing with these figures would require best practices, and wondered if all agencies had that knowledge.

Two posters addressed the issue of standards and the need to outline expectations associated with this level of funding. The last two messages in this area provided resources on Total Cost of Ownership.

Why LINC is Not Invited to the MICE-2 Conference?

The question in the title was posed by an ED. The moderator promised to relay the question to OASIS via OCASI.

Client Database/Management System for ISAP/HOST

The agency representative who opened this topic said that a client database would be a powerful tool for program planning. Other sectors use them, and the settlement sector should have available a program that each agency can customize, and use to report electronically to all funders. She acknowledged that such a system would be costly. A respondent said that her agency had begun to develop a database (with volunteer designers), but CIC had advised her that they would be developing a database, and her agency should not duplicate the effort. (See discussions of ICAMS and Standard Client Database.)

MICE-2 Fun Bowling Tournament

The moderator announced plans for a friendly competition on the first evening of the conference.

Technical Liaison Needs Help!

An ED who is also agency TL listed increasingly overwhelming responsibilities: breakdowns, viruses, hardware and software obsolescence, counterproductive configurations of the network, rising expectations of staff and clients. A colleague urged him to stay optimistic until the MICE-2 conference.

Assessment of Online Discussions

Extranet discussions have been used to support various projects, notably the first MICE project and the recent Evaluation Study. There is an ongoing technical support forum. However, the sector is still relatively inexperienced with online discussion. The MICE-2 Team was pleased that there was a good exchange of information and ideas at the MICE-2 forum and that a number of options from the online discussions went forward to the conference.

Just prior to the MICE-2 conference, the list of discussion topics extended to 2 pages. This required the reader to recognize that there was second page, and then click to open it. To read through any of the 5 most popular topics required clicking through 2 or 3 pages. To see any single page of messages, users had to scroll down the equivalent of 9 letter-size sheets of paper. Users did have the option of seeing the most recent messages first (useful to regular readers) or seeing most recent messages last (for those who wanted to read the discussion as it had developed).

The level of activity at the MICE-2 forum challenged the discussion forum interface in terms of readability and user-friendliness. As evidence of this, participants increasingly chose to open new topics rather than to post in existing ones, even though they were thematically relevant.

Another factor that made it harder for readers to make sense of some exchanges was participants' use of the "reply to this message" function. When users are not familiar with how this function works, or are not careful, the differentiation between the new message and the original can be lost. The moderator was able to fix the problem in most of these cases. More often, people picked up the entire original message, which added unnecessarily to the length of the new message.

In conclusion, the MICE-2 project was successful in introducing a number of EDs and managers to the Extranet discussions area. It also helped to legitimize online discussion as a communications tool for decision-makers in the sector. Progress in this area should supply momentum towards a useful application of online discussions in MICE-2 follow-up.

Awards of Merit

Members of the MICE-2 Team voted on awards of merit for substantial overall contributions to the MICE-2 Online Discussions. Prizes were announced at the final plenary of the conference.

Winners were:

First Place	Cathy Woodbeck, Thunder Bay Multicultural Association
Second Place	Lucila Spigelblatt, Catholic Immigration Centre, Ottawa
Third Place	Kiril Yordanov, Inter Cultural Neighbourhood Social Services, Mississauga
Fourth Place	Wali Farah, Ottawa Community Immigrant Services Organization
Fifth Place	Myrta Rivera-Sahas, Kitchener-Waterloo Multicultural Centre

There were additional draw prizes, for which all discussion participants were eligible.

Appendix Three Conference Participant List

Participants from ISAP-Funded Agencies

	Agency	Name	Position	E-mail
1.	Accessible Community Counselling and Employment Services, 489 College St., Suite 100, Toronto, ON M6G 1A5 Tel: 416-921-1800; Fax: 415-921-3055	Allison Pond	Executive Director	apond.tor@accestrain.com
2.	Afghan Association of Ontario (Canada), 29 Pemican Court, Unit #6, North York, ON M9M 2Z3 Tel: 416-744-9289; Fax: 415-744-6671	Assadullah Oriakhel	Executive Director	aoriakhel@afghano.org
3.	Bloor Information and Life Skills Centre, 672 Dupont Street, Suite 314 Toronto, ON M6G 1Z6 Tel: 416-531-4613; Fax: 416-531-9088	Sheila Cram Toni Testa Isabel Mahone	Executive Director Manager Manager	scram@bloorinfo.org
4.	Brampton Neighbourhood Resource Centre, 50 Kennedy Road South, Unit 24, Brampton, ON L6W 3R7 Tel: 905-452-1262; Fax: 905-452-1365	Lori Masters	Office Manager/TL	lmasters@bnrc.org
5.	Canadian Centre for Victims of Torture (CCVT), 194 Jarvis Street, 2nd Floor, Toronto, ON M5B 2B7 Tel: 416-363-1066; Fax: 416-363-2122	Mulugeta Abai	Executive Director	mabai@ccvt.org
6.	Canadian Ukrainian Immigrant Aid Society, 2150 Bloor St. West, Suite 96, Toronto, ON M6S 1M8 Tel 416-767-4595; Fax: 416-767-2658	Ludmilla Kolensnichenko	Senior Counsellor	lkolensnichenko@cuias.org
7.	Catholic Community Services of York Region, 21 Dunlop Street, Richmond Hill ON L4C 2M6 Tel: 905-770-7040 Ext. 235; Fax: 905-770-7064	Stephen Lam	Director, Immigrant Services & Community Program	slam@ccsyr.org
8.	Catholic Cross-Cultural Services, 780 Birchmount Road, Unit 11, Toronto, ON M5P 2W4 Tel: 416-644-0816 Ext. 304; Fax: 416-644-0819	Carolyn Davis	Executive Director	cdavis@cathcrosscultural.org

	Agency	Name	Position	E-mail
9.	Catholic Immigration Centre, Ottawa, 219 Argyle Ave. 5th Floor, Ottawa, ON K2P 2H4 Tel: 613-232-9634 Ext. 347; Fax: 613-232-3660	Lucila Spiegelblatt	Deputy Executive Director	lucila@cic.ca
10.	Centre for Spanish Speaking Peoples (CSSP), 2141 Jane St. Toronto, ON M3M 1A2 Tel: 416-533-8545; Fax: 416-533-5731	Susan McCrae Vander Voet	Coordinator/ Administration	susan@spanishservices.org
11.	Cornwall and District Immigrant Services Agency, 144 Pitt St., Toronto Tel: 613-933-3745; Fax: 613-933-9689	Sophia Reyes-Leger	Executive Director	cdisa-on@canada.com
12.	COSTI, 700 Caledonia Road, Toronto, ON M6B 4H9 Tel: 416-789-3420; Fax: 416-789-3499	Gerry Stypelkorshi Robert Cazzola	Manager Director, Social Services	 cazzola@costi.org
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Appendix Four

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Appendix Five

MICE-2 Conference Participant Feedback Summary

57 completed feedback forms were received. This represents a return rate of 70%. Respondents self-identified as follows:

- 20 Executive Directors
- 16 program directors/managers
- 8 other
- 13 unspecified

Please note:

1. Percentages may not total exactly 100% due to rounding.
2. Comments included in this summary were selected as representative of response themes.

1. The MICE-2 conference was intended to provide opportunities to do the following:

- (a) **Examine and share ideas to enhance settlement services through effective use of information technology**
- (b) **Look at the essential role of information technology in the overall operations of an immigrant services agency and examine ways of strengthening and sustaining that role**
- (c) **Discuss the findings of the RealWorld Systems Evaluation Study and develop forward-looking strategies to advise CIC on future priorities**

Objective (a) was accomplished.

	No. of Responses	Percentage
Strongly agree	12	21%
Agree	35	61.4%
Neutral	7	12.3%
Disagree	1	1.8%
Strongly disagree	1	1.8%
No response	1	1.8%

Objective (b) was accomplished.

	No. of Responses	Percentage
Strongly agree	16	28.1%
Agree	35	61.4%
Neutral	3	5.3%
Disagree	0	0%
Strongly disagree	1	1.8%
No response	2	3.5%

Objective (c) was accomplished.

	No. of Responses	Percentage
Strongly agree	15	26.3%
Agree	26	45.6%
Neutral	11	19.3%
Disagree	3	5.3%
Strongly disagree	1	1.8%
No response	1	1.8%

2. The information I received prior to the conference was thorough and gave me a good idea of what to expect.

	No. of Responses	Percentage
Strongly agree	18	31.6%
Agree	29	51%
Neutral	6	10.5%
Disagree	0	0%
Strongly disagree	1	1.8%
No response	3	5.3%

3. There was a good exchange of ideas and viewpoints at the conference.

	No. of Responses	Percentage
Strongly agree	25	43.9%
Agree	29	50.9%
Neutral	2	3.5%
Disagree	0	0%
Strongly disagree	1	2%
No response	0	0%

4. I was able to contribute to the discussions.

	No. of Responses	Percentage
Strongly agree	24	42.1%
Agree	30	52.6%
Neutral	2	3.5%
Disagree	0	0%
Strongly disagree	0	0%
No response	1	1.8%

5. The conference facilities were ideal.

	No. of Responses	Percentage
Strongly agree	13	22.8%
Agree	27	47.4%
Neutral	10	17.5%
Disagree	5	8.8%
Strongly disagree	0	0%
No response	2	3.5%

Comments:

Limited Food Choices — in particular, not enough protein (2 comments. See also #8.)

- The lunch provided on the first day was full of carbohydrates and no protein. Please consult with some vegetarians to make it a balanced, nutritious and cost-effective meal.

Good Food Choices (1 comment. See also #7.)

6. The conference was a good use of my time.

	No. of Responses	Percentage
Strongly agree	15	26.3%
Agree	32	56.1%
Neutral	6	10.5%
Disagree	0	0%
Strongly disagree	2	3.5%
No response	2	3.5%

7. What I liked most about the conference was:

Networking and Exchange of Ideas (24 comments)

- The opportunity to come together and really analyse and formulate recommendations for future.
- Sharing viewpoints, ideas, and challenges with other agencies.
- The opportunity to dialogue with other agency managers about the overall impact of technological changes.
- Sharing information. Making sure we are talking the same language regarding MICE-2. Unify our force.
- Getting an "inventory" about what approaches are being taken by other agencies.
- The confirmation that many SPOs could agree on priorities we all felt were important.

Workshop Groups and Processes (13 comments)

- Well structured discussion groups.
- Splitting participants into smaller groups and then extracting ideas.
- This is more like a work group than anything else. We have some concrete things completed.
- Focussed and short time. (We stayed in the) Same group for discussions.

(3 comments here praised facilitators. See also #16.)

- Our facilitator had the knowledge and tools to guide the workshop to come out with very good recommendations.

Overall Conference Program (8 comments)

- The positive optimistic attitude of the organizers, presenters and participants.
- Focus on management.
- It enabled the participants to get ideas and suggestions to funders, so as to be able to improve use of technology in assisting our clients and become more effective service providers.
- Opportunity to put our best thinking to the topic of technology.
- Motivate everyone to form a voice to CIC about IT needs and financial support.

Conference Organization (5 comments)

- The food.
- Overall it was very organized and well planned.
- The catering crew was very helpful and hospitable.
- Good organization overall. Distribution of conference information.

Other Aspects (1 comment)

- Gillian [Kerr's presentation on the Evaluation of the Computerization Project]. Well-organized, good package.

8. What I liked least about the conference was:

Conference Program and Related Issues (8 comments)

- Not everyone had the same expectation of this conference. It was a philosophical conference and some had expected it to be a technical one.
- What it cost the taxpayers. Perhaps could have achieved similar results with less dollars.
- Agencies bringing their own issues to the table rather than looking at the "bigger picture".
- Nothing much to do in the evening.
- Lack of representation from CIC
- Repetition

Food (7 comments. See also #5.)

- Vegetarian meals lacked a nutritional balance. Could have been better – especially at dinner
- The caterers did not consider religious or cultural prohibitions of certain food.

Length and Scheduling (6 comments)

- Too much on the agenda.
- Too long – could have done the work in 1 day.
- Too short time.
- Giving two days is difficult.

Location (5 comments)

- Why St. Catharines? There is only one service provider here. Would it have been more practical to choose a location where there are more?
- Bad location. Too far.

Conference Centre/Hotel (4 comments)

- Hotel receptionists didn't have proper training to address questions.
- Telephone access
- Accommodations

9. The settlement sector will benefit as a result of this conference.

	No. of Responses	Percentage
Strongly agree	17	29.8%
Agree	22	38.6%
Neutral	13	22.8%
Disagree	0	0%
Strongly disagree	1	1.8%
No response	4	7%

Comments:

About one-half of respondents thought the conference was useful in itself. (21 comments)

- The conference has been a good beginning in the transition for the computerization process in the sector.
- Awareness raised on IT impact on settlement work will develop into creative and innovative changes.
- Unity is strength. SPOs sharing information and using common strategy in dealing with the funders
- Interaction between agencies is so important not to feel alone. I believe that this conference will result in more/better technical support, hence help us provide more/better service.
- It identified standards for technology, it gave us an opportunity to share specific agency practices and, hopefully, requests for funding IT from different agencies will be more uniform.
- Issues on the table. Good start of dialogue. Long-term planning and thinking.
- The conference allowed agencies to articulate the difficulties in the adoption of technologies and how the nature of settlement services are being changed in the process.
- The agencies learned 1. The impact of computerization on their service delivery 2. The "real cost" of delivering services in a computerized environment.
- Participation in policy decision making on funding helps funders as well as agencies to understand and pinpoint their IT needs.
- The sector has begun to move from being the victim of CIC impositions to becoming more assertive in articulating and demanding better relationship in funding with CIC.
- The recommendations are all relevant and will be valuable input to CIC and OCASI.

The other half said the benefit to the sector will come with action on the recommendations (20 comments)

- Depends on CIC. Only if CIC is open to accepting partial responsibility for sustaining IT will the sector benefit.
- Only if the sector plays an active role in the follow-up.
- Discussions generate ideas and suggestions and we need them to move forward and not only be able to cope, but manage in a computerized environment.
- Too difficult to determine. Too many variables.

The conference was not useful (2 comments)

- It seemed the discussion was mostly on the desire for more funds for one's organization. Knowing well the limitations, [participants] went on with the wish lists.

10. Suggestions for follow-up to this conference:

Follow-up Committee/Working Group(s) (10 comments)

- Form a committee to follow-up with the recommendations.
- Several work groups to develop/refine recommendations. Info/update and campaign for participation of all agencies of OCASI. Measure/evaluate our accomplishment in IT-related service development.
- CIC funds support; committee is formed to analyze need; follow-up report from committee to attendees at conference.
- Task force of agencies and OCASI and CIC to follow through on the Real World and MICE-2 recommendations.

Implement the MICE-2 Recommendations (9 comments)

- Ensure that the recommendations all followed up.
- The recommendations be followed through and actions taken ASAP because we as a sector are too far behind in terms of using technologies to our advantage.
- Put into action ideas and recommendations in timely manner.

OCASI's Role (8 comments)

- OCASI should play a key role as intermediary between the sector and the funders.
- Keep us updated on the progress of the recommendations.
- Give us a report. We need to hear what CIC will do. Did they hear us and will they help?
- Get OCASI Board and SOSC active on this.

Further Discussion and Conferences (5 comments)

- Continue the dialogue in the discussion groups on the Extranet
- MICE-3
- In future have one-day conferences. Do it in smaller geographical groups. Consult via phone, fax, email, etc.
- This kind of conference on a regular basis (once a year).

OASIS-CIC (3 comments)

- Ask agencies what they want instead of deciding arbitrary amounts to fund.
- Timely communication from CIC about what action steps to be taken with respect to recommendations—within timeframe for 2002-03 cycle.

Training (2 comments)

- Training needs for existing 1. TLs/substitutes 2. Managers
- Do actual training (for managers)

Other (2 comments)

- Better distribution of information
- Measurement outcomes and delivering quality programs to clients must be considered a top priority in addition to statistics count.

Opening Plenary

11. The panel in the opening plenary was informative.

	No. of Responses	Percentage
Strongly agree	4	7%
Agree	28	49.1%
Neutral	12	21%
Disagree	5	8.8%
Strongly disagree	1	1.8%
No response	7	12.3%

Comments:

- It would have been more appropriate to have a panel of success stories involving settlement agencies.
- This could have been more useful had it been a keynote speaker to inspire participants.

12. The presentation on the RealWorld Evaluation was useful preparation for conference discussions.

	No. of Responses	Percentage
Strongly agree	10	17.5%
Agree	32	56.1%
Neutral	9	15.8%
Disagree	1	1.8%
Strongly disagree	0	0%
No response	5	8.8%

Workshops

13. Number of respondents by Workshop Group

9	Group 1	8	Group 5
7	Group 2	9	Group 6
8	Group 3	7	Group 7
7	Group 4	2	No response

14. The background information provided was helpful.

	No. of Responses	Percentage
Strongly agree	15	26.3%
Agree	36	63.2%
Neutral	2	3.5%
Disagree	0	0%
Strongly disagree	0	0%
No response	4	7%

15. The workshops were a well-designed process towards formulating recommendations and strategies.

	No. of Responses	Percentage
Strongly agree	13	22.8%
Agree	34	59.6%
Neutral	2	3.5%
Disagree	0	0%
Strongly disagree	1	1.8%
No response	7	12.3%

16. The facilitator was helpful to the group in guiding the workshop processes.

	No. of Responses	Percentage
Strongly agree	21	36.8%
Agree	23	40.4%
Neutral	5	8.8%
Disagree	0	0%
Strongly disagree	2	3.5%
No response	6	10.5%

Comment:

- I am not sure if (it was the) facilitator's fault, but she did not work on the objectives at all. (See also #7 for comments on facilitators.)

Closing Plenary

17. The final plenary session was a well-designed process to share strategies and recommendations and begin to take action.

	No. of Responses	Percentage
Strongly agree	9	15.8%
Agree	27	47.4%
Neutral	5	8.8%
Disagree	0	0%
Strongly disagree	2	3.5%
No response	14	24.6%

18. The facilitator of the final plenary was helpful to the group in guiding the process to share strategies and recommendations and begin to take action.

	No. of Responses	Percentage
Strongly agree	10	17.5%
Agree	22	38.6%
Neutral	8	14%
Disagree	0	0%
Strongly disagree	0	0%
No response	17	29.8%

Additional comments.

Thank you (5 comments)

- Thank you OCASI staff. I enjoyed MICE-2.
- Thank you OCASI for a job well done.
- Thank you for the opportunity in bringing us together. Hopefully we will be heard and changes will come.

OCASI Leadership (3 comments)

- The importance of organizing within OCASI is reaffirmed in such gatherings.
- I am hoping that the recommendations made at the conference shall be looked critically by all stakeholders and try to implement many of them in the interest of the settlement sector.
- Excellent leadership from OCASI.

Bowling Pros and Cons (2 comments)

- Thanks for the arrangement for group bowling.
- Next time have more fancy entertainment like music and dance rather than bowling. Also the hotel facility was not an ideal one. We need swimming pools, etc.

Appendix Six

Consensus and Trends from MICE-2 Group Recommendations and Discussions

Participants at the MICE-2 conference divided into seven workshop groups of 10-12 participants each. The information presented here has been taken from (1) MICE-2 workshop group recommendations and (2) group consensus, as indicated by scribes' and facilitators' workshop notes. These points have been organized into themes. The level of support is indicated, along with a "middle-ground" view of the responsibilities and timing.

Decentralization of IT Management

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
<p>7 groups support decentralization to allow agencies flexibility in managing IT</p> <ul style="list-style-type: none"> • 4 groups in their recommendations • 2 groups as a prior condition to other recommendations • 1 group by discussion consensus 	Leadership	<p>1. Funders add funds to agency budgets to cover TCO</p> <p>2. Agencies work as a sector to build capacity</p>	Within this fiscal year
Sub-Themes and Other Points of Note			
<p>3 groups spoke about a planning process to move to decentralized management (2 groups in their recommendations, 1 group by discussion consensus). 3 other groups recommended a transitional period and/or capacity building (related to IT) within the sector.</p> <p>3 groups spoke about the need to establish minimum standards for agency hardware and software (2 groups in their recommendations, 1 group by discussion consensus).</p> <p>2 groups said that a first step should be an upgrade of agency computers (1 group in a recommendation, 1 group by discussion consensus).</p> <p>Discussion notes indicate that some individual agencies don't favour or don't feel ready for decentralization. Besides the capacity building recommendations, and one group's mention of "flexibility" in the sustainability plan, 2 groups specifically agreed that there should be an option for agencies to opt-out of decentralized IT management.</p> <ul style="list-style-type: none"> • 1 group made a recommendation that agencies could choose to have CIC retain responsibility • 1 group by discussion consensus said that agencies could choose to be part of an IT co-op 			

Determining Total Cost of Ownership

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
<p>7 groups say there is a need to establish the real TCO for the sector</p> <ul style="list-style-type: none"> • 6 groups said this directly in their recommendations • 1 group said it implicitly in their recommendation 	<p>Lead and coordinate research study; take results to funders</p>	<p>1. CIC funds the study 2. Agencies give input 3. CIC and potential funders view results of study</p>	<p>Complete in time to do 2003-04 budgets (i.e. in about 6 months)</p>
Sub-Themes and Other Points of Note			
<p>All workshop groups reviewed a workshop handout on elements of TCO and 2 groups included lists of TCO elements in their recommendations. However, overall discussion indicates that confusion or disagreement remains about what is included in TCO. Training is one key area of difference — see the Training theme. There was also general confusion and doubt as to how one figure, or even a simple formula, could be applicable to different size agencies and different uses of computers; and how TCO allocation would be adjusted for changes over time.</p> <p>2 groups recommended consulting other sectors as well as settlement service agencies.</p> <p>2 groups recommended adopting the \$250 per month per workstation funding (as per the Evaluation report) on an interim basis.</p> <ul style="list-style-type: none"> • 1 recommendation said start immediately • 1 recommendation said make the figure retroactive to April 1, 2002 <p>No individual or group had a strong opinion on how good an estimate the \$250 figure is. It was most commonly stated that this figure could only be useful as a minimum (as it was offered in the RealWorld report).</p>			

Implementing the TCO Model

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
<p>7 groups say that computers and IT are now an integral part of settlement work and recommended that new dollars should come to the sector to fund full TCO</p> <ul style="list-style-type: none"> 4 groups said this directly in their recommendations For other groups, this position was implicit in their recommendations and discussions on TCO 	Leadership and sector representation	CIC and other funders recognize need and support the work of the sector	For next fiscal year; and in the long-term
Sub-Themes and Other Points of Note			
<p>Four groups directly said IT needs new funding, and the funder's provision of TCO shouldn't affect existing levels of funding (4 group recommendations – 1 with reference to IT training, 1 with reference to the current 15% allocation to administration). All groups discussed this need, and there was applause for this point at the final plenary.</p> <p>Three groups recommended that TCO be worked into administration costs (2 groups in their recommendations, 1 group by discussion consensus), addressing the issue that IT is integral.</p> <p>Two groups said that IT-trained personnel should get higher salaries (1 group in their recommendation, 1 group by discussion consensus)</p>			

New Approaches for Funding

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
<p>Seven groups say the sector needs multi-year funding (including, but not limited to support for IT needs)</p> <ul style="list-style-type: none"> 5 groups in their recommendations 2 groups by discussion consensus 	<ol style="list-style-type: none"> Continues with VSI Initiative Represents sector at funders table 	CIC commits to multi-year funding; endorses approach with other partners	Soon
<p>Four groups say the sector needs new sources of funding to support IT and propose a funders table to discuss the needs of the sector</p> <ul style="list-style-type: none"> 3 groups in their recommendations 1 groups by discussion consensus 	Brings sector perspective to table and reports to sector	<ol style="list-style-type: none"> CIC brings other funders to the table Sector is consulted; supports OCASI 	Current fiscal year

Information Management System

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
7 groups recommend that an information management system be developed within the sector, with a focus on the needs of agencies and their clients	OCASI to be contracted to develop the database	1. CIC provides funds for development (and perhaps other funders following funders table) 2. Sector is consulted	Within 2 years
Sub-Themes and Other Points of Note			
<p>The term “common database” was used in the workshop hand-outs, but most discussion indicates that people didn’t like this term because it is misleading. Agencies will actually have their own databases, although many agencies may use a common application, designed to meet client and agency needs. The database will not be tied to any funder, but will allow agencies to pull out selected information fields for their reports to various funders. Groups typically had lists of requirements (adding to or modifying the list provided to them by the facilitator, which was developed through online discussions). Flexibility (for different agencies, different programs); avoiding multiple entries of data; security of data; and confidentiality of data (to protect the client and to protect agencies from privacy violations) were the most prominent issues.</p> <p>The sector is unhappy with the ICAMS.</p> <ul style="list-style-type: none"> • 1 group made a direct recommendation that ICAMS be withdrawn pending a consultation with the sector • 1 group had discussion consensus • 3 other groups discussed ICAMS negatively — problems of maintaining client confidentiality; potential legal liability under the privacy act; the “black box” computer isn’t compatible with other equipment; it requires multiple entry of data; and it is of no use relative to agency management.. 			

New or Enhanced Uses of IT

Consensus and Trends	Who Should Take Responsibility		When
	OCASI's Role	Others	
<p>Five groups say CIC should recognize and fund new ways that agencies are providing settlement services and new types of clients</p> <ul style="list-style-type: none"> • 4 groups in their recommendations • 1 group by discussion consensus 		CIC as funder	
Sub-Themes and Other Points of Note			
<p>All groups discussed how IT had changed settlement work, and there was particular emphasis on pre-arrival settlement services. Sample recommendations</p> <ul style="list-style-type: none"> • Provide separate funding and collect separate statistics for pre-arrival settlement services provided by email or by (agency's) website. This may be a separate program to address need for information before landing in Canada • Recognize that IT has significantly expanded the provision and types of services (e.g. email client support, access to computers by clients). Review and revise eligibility criteria in light of impact of IT • Make a web presence part of the ISAP Outreach Action Plan. A website provides an additional way for clients to learn about/access services and information. <p>A review of "client eligibility" in light of the impact of IT was addressed in two group recommendations, and a topic of discussion in most groups. Two groups made recommendations, and 1 group had consensus that email and web-site contact should be legitimized/counted as settlement service. (All groups discussed at length how email, web-sites and Internet had affected services. The issue of "legitimizing" email work may have been a non-issue for some.)</p>			
<p>Two groups discussed an enhanced role for the Extranet to support settlement workers</p> <ul style="list-style-type: none"> • 1 group made a recommendation • 1 group had discussion consensus 	Through SOSC	SOSC	

IT Training and Professional Development

Consensus and Trends	Who Should Take Responsibility		
	OCASI's Role	Others	
Five group recommendations speak to the need for ongoing IT training in the sector	Coordination	CIC funds	
Sub-Themes and Other Points of Note			
<p>There was not consensus on how training should be provided. Some of the viewpoints:</p> <ul style="list-style-type: none"> • Enhance professional development budget allocations. • Continue ISAP — Stream B sector funding for ongoing professional development • Managers need training for decentralized IT management (as part of a transition plan) • Three groups said that IT training is covered in TCO; 1 group specifically said that won't putting training under TCO won't work; 1 group said IT training should be separate from the general training and from TCO. Despite disagreement on the "how" aspect, all were trying to entrench funds for training. 			
Two groups said there is a need for an IT training plan for the sector.	Conducts needs assessment	CIC funds	Within next 2 years
Sub-Themes and Other Points of Note			
<p>In addition to the two groups that recommended an IT training plan or strategy, 2 groups' recommendations mentioned implementation of training opportunities as a sector, where agencies determine individual choices (i.e. how to spend their training money). Therefore, 4 of the 7 groups favour an coordinating role for OCASI related to IT training for the sector.</p>			

Follow-up to MICE-2

Consensus and Trends	Who Should Take Responsibility		
	OCASI's Role	Others	
Four groups recommend a committee or task force to take responsibility for follow-up on MICE-2 recommendations	Is represented on committee	1. Sector representation on committee 2. CIC works with the committee	Within this fiscal year
Sub-Themes and Other Points of Note			
<p>Recommendations varied on the committee make-up and mandate:</p> <ul style="list-style-type: none"> • Form a committee to work towards implementation of MICE-2 conference recommendations. Membership should be representative of geographical regions, size of the agency, and CIC funding stream; also members should have direct knowledge of IT issues • Check to see if there is an existing committee that could take on this duty. For example, the Settlement.Org Steering Committee (SOSC) might be able to do so if its mandate were enhanced and perhaps its name changed. • Form an implementation task force to follow through with MICE-2 recommendations, deal with and discuss validity of RealWorld report and be consulted for the process of establishing TCO. <p>11 participants at the MICE-2 final plenary volunteered to sit on a MICE-2 Follow-up Committee.</p>			