



eCaliberGroup
TRANSFORMATIVE TALENT MANAGEMENT

Calience Research and Consulting



**Settlement Counsellor
Profile Research
FINAL PROJECT
REPORT**

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CERIC

Advancing
Career
Development
in Canada

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au Canada

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PROJECT TEAM



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Iren Koltermann is the Managing Director of eCaliber Group. She is a senior management consultant with expertise in talent management, diversity, program development, and training. Iren has 20 years of experience, assisting organizations develop diverse talent management strategies. Iren has an MA in Intercultural Communication and a Graduate level Certificate in Sustainable Community Development.

eCalibre Group (ecalibergroup.com) is a unique management consultancy that is focused on helping companies, organizations and individuals navigate the complex world of talent management and work. Our lines of business include: the provision of integrated talent management solutions for clients in both the private and public sectors; diversity and inclusion policy and program development; the creation and delivery of seminars, workshops and coaching programs that help clients and individuals better understand and navigate the world of work.

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Daiel Scott, Principle Researcher

Dan brings more than 15 years of experience assisting non-profit, community serving organizations to improve their program delivery by collaborating with them to build organizational capacity. He has worked in organizational development, volunteer management, and content development and program delivery in Canada and internationally.

Dan is a principal of Calience Research and Consulting (calienceconsulting.com), a firm working with non-profit, community based organizations, providing professional services in capacity building, volunteer management, organizational development, program design, and in person and online content development and delivery. Dan holds a BA in Law, graduating with distinction.

EXECUTIVE SUMMARY

State the over-arching need or gap that you identified that warranted such a project. How does this fill a 'gap' in the career counselling field?

In November 2017, Immigration, Refugee and Citizenship Canada (IRCC) announced a three-year plan that set “the most ambitious immigration levels in recent Canadian history”. Immigration plays a vital role in Canadian society, in its population, labor force, economic and social development. At present, immigration generates 71 percent of population growth in Canada¹. Newcomers, i.e. immigrants who have been in Canada from 1-5 years, account for 23.8 percent of the Canadian workforce²; 90 percent of labor-force growth is due to immigration, a number anticipated to rise to 100 percent in the coming years as the majority of baby boomers leave the workforce³. A recent study by the Conference Board of Canada forecasted that without immigration the country’s potential economic growth would slow from 1.9 percent to an average of 1.3 percent annually. Beyond the economic impact, immigration creates linkages to an increasingly globalized world and adds to the richness and strength of Canadian society as a whole.

Canada is widely acknowledged to have one of the most vibrant and robust settlement sectors in the world⁴. The sector has evolved over the past half century in response to emerging needs. At its core are some 500 non-profit organizations⁵ that deliver programs and services to help newcomers adjust to life in Canada and to encourage and assist them to become “active in the economic, social, civic, cultural and spiritual affairs”⁶ of their new country. The network of organizations has shown resilience, flexibility and creativity in responding to changing needs and requirements of a diverse array of newcomers, excelling in assisting the most vulnerable.

Given the complexity of the whole area of immigration and settlement, it is not surprising that the sector faces persistent challenges. In August 2018, the Conference Board of Canada published a report providing a synopsis of its fourth annual Canadian Immigration Settlement Summit held during May of that year. The report noted that immigrants struggle to “find work commensurate with their skills”⁷ and that there are “ongoing challenges with the settlement program, including determining which services are most required and most effective, ensuring adequate settlement funding to cover the growing demand for services as Canada’s immigration levels rise, facilitating collaboration among stakeholders, which

¹ El-Assal, Kareem and Daniel Fields. Canada 2040: No Immigration Versus More Immigration. Ottawa: The Conference Board of Canada, 2018, p. iii.

² Statistics Canada, Census data table 98-400-X2016372.

³ Kareem El-Assal. 2018. “Canada’s 2018-2020 Immigration Plan is a Step in the Right Direction, but More Work is Needed”, Canada Immigration Newsletter, <https://www.cicnews.com/2018/04/canadas-2018-2020-immigration-plan-is-a-step-in-right-direction-but-more-work-is-needed-0410485.html#gs.IWUwlrqd>, p. 14.

⁴ El-Assal, Kareem, and Ali Bajwa. Strengthening Canada’s Immigration System. Ottawa: The Conference Board of Canada, 2018.

⁵ El-Assal, Kareem, and Ali Bajwa. Strengthening Canada’s Immigration System. Ottawa: The Conference Board of Canada, 2018.

⁶ Ibid., p.8.

⁷ Ibid., p. iii.

can be difficult due to competition for limited government funding; and government funders providing settlement organizations with the flexibility to deliver tailored supports that correspond with the diverse needs of immigrants within their respective communities.”⁸ Of note is that the “retention of settlement workers was flagged as a major obstacle by numerous speakers and audience members due to low wages and wage growth in the sector.”⁹

This project intended to address the need for human resource development in areas of recruitment, retention and capacity building (training & development) in the settlement sector by gaining insight into the work of settlement counsellors and outlining their career path. In addition, it identified key competencies that can form the foundation for effective and affordable training. These research outcomes will: help to raise the profile of the settlement counsellor position; assist settlement managers to recruit, orient and train potential settlement counsellors and strengthen their contribution to the settlement process; and, provide career counsellors with information needed to provide career advice to those who aspire to enter the settlement sector.

Describe how the project meets CERIC’s mission, vision and strategic priorities.

The project related directly to CERIC’s primary mission, “to encourage and provide education and research programs related to the development, analysis and assessment of career development theories and practices”, and CERIC’s vision, “to increase the economic and social wealth and productivity of Canadians through improved quality, effectiveness and accessibility of counselling programs, especially in the areas of career counselling and career education.”¹⁰ Calience and eCaliber have worked with the non-profit sector, particularly in the area of immigration and settlement, and have offered programs that aim to build capacity in those working in the settlement sector so that they can better help newcomers to Canada lead fulfilling lives and contribute to the betterment of their communities.

The project findings will provide career counsellors with information needed to provide career advice to those who are aspiring to enter the settlement field, and to help them better plan and envision their career paths in the sector. In addition, managers working for settlement agencies can draw on the findings to recruit, train and develop settlement counsellors more effectively and overall strengthen their contribution to the settlement process of newcomers. Overall, the findings can help raise the profile of the profession.

⁸ Ibid., p. 14

⁹ Ibid., p. 18

¹⁰ CERIC website [www.ceric.ca](http://ceric.ca) retrieved in 2017 from <http://ceric.ca/about/>

Describe the project in broad strokes – clearly state the problem you have identified needs to be addressed, the project purpose, goals, objectives and rough timelines.

This CERIC-funded project was conceived to address the issue of capacity building of the settlement counsellors so that they can effectively respond to the emerging needs of newcomers. In order to address this issue the project had two interrelated goals:

1. To gain insight into the work of settlement practitioners and to outline the career path of this position. The career path provides greater insights into the role and potential advancement in the field, hence encouraging more applicants to enter the field. In addition, it provides career counsellors with the necessary information so that they can help those interested in the field make informed decisions.
2. To identify key competencies that can form the foundation for effective and affordable training. The project sought to contribute to a rich and growing body of knowledge used by settlement agencies to raise the profile of settlement workers; to help identify potential candidates; to provide initial and ongoing training with greater effectiveness and affordability; and to ensure talent is well nurtured.

The full project took 18 months to fully complete, from May 2018 to November 2019.

The first phase of the project involved a comprehensive literature review which was completed in September 2018. The report, titled “The Competencies of Frontline Settlement Workers in Canada – A Background Research Report”, described the nature of settlement work and the larger context of immigration in which it is carried out. It went on to review the research and efforts that have been undertaken thus far toward strengthening the capacity of settlement agencies and frontline settlement practitioners.

The second phase was completed in mid-April 2019 and involved conducting 40 semi-structured, in-depth interviews with 16 settlement counsellors, 17 of their immediate managers and seven key individuals working in regional roles within the sector.

During April and May 2019, the initial findings were validated and further refined during five focus group discussions with settlement counselors and their managers in four cities: Halifax, Montreal, Toronto and Vancouver. The findings were then shared with the original interviewees and their comments and further suggestions were incorporated into the final report

Talk about your target audience, stakeholders and any partners/ collaborators.

The primary audience and beneficiaries of the project are settlement organizations, especially their managers who recruit, orient, train and support the development of front-line settlement workers. Settlement counsellors were also our target audience as we needed to talk to them in order to better understand the day to day work that they do so that we could develop competencies that are needed to help them work effectively and address emerging needs.

Early in the project we came to appreciate that we needed to engage provincial and local umbrella organizations that provide support to settlement agencies. Many of our initial contacts were members of these umbrella organizations who provided us with valuable information as to what work had already been done in developing competencies for settlement counsellors and also who to talk to in various regions.

We also view the individuals and the organizations we interviewed for the project as our collaborators who we turned to for input and assistance, and will continue to do so as we build on this work and as we prepare and deliver training content in future.

Clearly state the project deliverables.

Our deliverables consisted of a comprehensive literature review, including an environmental scan related to capacity building of frontline settlement workers in Canada; a general competency framework including eight competencies for frontline settlement counsellors; an info-graph capturing the career path of settlement counsellors which includes a summary of what settlement counsellors do, including education and experience requirements to enter the field; a final project report outlining the results of the project; and two PowerPoint presentations for Cannexus19 and for roadshows and webinar. Lastly an article outlining the research findings which is published in *Careering Magazine*.

Was the project carried out as intended? If yes, what was different? If no, skip to next question.

The project was carried out as intended. There were two adjustments made early in the research phase of the project:

1. We narrowed the focus from all frontline settlement workers to consider specifically the role of settlement counsellors. Our early research showed that the very broad range of work that settlement counsellors engage in, makes this role an ideal one for which to identify competencies that would be widely applicable. We reasoned that this was a stronger approach than focussing on many smaller, more narrowly defined and specialized frontline roles such as language trainers or employment counsellors, as the competencies derived from the role of settlement counsellors could potentially be relevant and applicable to some aspects of the specialized roles as well. Considering the defined scope and time frame of the project it made sense to focus on one of the more comprehensive frontline settlement roles.
2. We decided to pay particular attention to emerging trends within the settlement field and how they shape the role of settlement counsellors. We ensured that the competencies that emerged from the research would contribute to the development of the role into the future, in response to emerging trends and demands.

Did the nature of any of the deliverables change over the course of the project? If so, how and why? If not, skip to the next question.

The nature of the deliverables did not change.

Did the timelines change? If so, how and why? If no, skip to the next question.

The initial timeline for the project was 10-months but the project actually took 18 months, 13 months to complete the research aspect of the project and the additional 5 months to finalize the reports, graphic work and dissemination of the findings in roadshows and webinar.

The primary reason for the additional time for the research portion was the challenge of arranging interviews with settlement counsellors and managers, who we came to appreciate are exceptionally busy. While we had anticipated the interview process to take approximately three months it took just under five months. The overall timeline of the project was also slightly extended due to personal circumstances of one of the principal researchers.

What was the anticipated outcome?

The anticipated outcome of the project was a competency framework that was generic and simple enough to be used by settlement managers to recruit, retain and develop their frontline settlement counsellors. Additionally, we hoped that the info-graph outlining the career path of settlement counsellors can be used by career counsellors to help those who want to enter the field better understand what they needed in terms of both education as well as experience to enter the settlement field, and what could be their potential career development path within the settlement sector. This info-graph can also be used for career development purposes by those who are already working in the sector.

Were there changes to any other components of the project? If so, what was the nature of the change and what was its impact on the project?

The project overall was carried out as intended. We made the following changes to ensure that our findings were more comprehensive:

1. Prior to the second phase of the project we decided to increase the number of interviews since we came to appreciate the wide variation in the role of the settlement counsellors from province

to province and even amongst various organizations based on funders' requirements and regional differences. To be comprehensive we increased the number of interviews from our initial plan of 20 to 25 interviews, to 40 in-depth interviews with individuals working in both rural and urban areas.

2. We also organized one additional focus group, having five rather than the originally planned four.
3. We had originally intended to talk to organizations and individuals in BC, Ontario, Quebec and Nova Scotia but during the first phase of the project we found out that Alberta had gained some experience with a competency framework they had developed. Therefore, we included organizations in Alberta in order to learn more about these efforts. Once we looked deeper into the competency framework of Alberta we decided to go ahead with our work, since the Alberta competency framework was used for developing and delivering academic courses to those working in the settlement field in its current state. We continued our work since we intended to develop a simple, and accessible competency framework that could be used by managers working within the settlement sector for the purposes of recruitment, retention and development of the settlement counsellors. In addition, we wanted to see how the role needs to evolve in order to address the emerging needs of the sector. The competency framework we developed addressed both of these gaps which were identified and confirmed during the first stage of our research.

THE NEED FOR THE PROJECT

Discuss the need for this project and describe changes, modifications, adaptations, if any, and very brief justifications to the originally presented problem to be solved.

The census data released in October 2017 provides a new national portrait of immigration in Canada. In 2016, more than 1 in 5 Canadian residents were born outside of Canada, and this number is going to rise in future. Over 60% of people who immigrated to Canada in the last five years were economic immigrants.¹¹ In November 2017, Immigration, Refugees and Citizenship Canada (IRCC) announced a three-year plan for immigration targets that sets “the most ambitious immigration levels in recent Canadian history”.¹² Due to this increase in the number of new immigrants, and their diverse backgrounds, the settlement sector will be under pressure to effectively assist these new comers in their integration process.

Based on our previous projects in the sector, we had identified two main challenges that impacted capacity building in the sector:

1. Lack of insufficient and consistent funding for training and development in the sector
2. The rapid pace of changes in immigration policies and understanding the impact of the changes on the newcomers and the nature of the work of the settlement counsellors.

So it was clear based on our personal observations that the settlement sector needs to be strengthened and attention paid to human resource development in order to be able to continue to respond effectively to the increasingly diverse and complex needs of newcomers. Settlement counsellors are frequently the first point of contact for newcomers and therefore play a critical role in assisting the socio-economic integration process of newcomers. The sector needs to be able to attract qualified professionals to the settlement field. Career counsellors can benefit from having a current and clear description of what settlement workers do and what academic skills, knowledge, qualities, and attitudes the incumbents choosing this field need to have. This information can assist career counsellors in raising the profile of careers in the settlement sector, providing sound career advice, sharing what competencies the individuals entering this field need to develop, and showing clear career development pathways to those who aspire to enter this field. Those who enter this field would also benefit from having a clear career development path, stronger orientation and onboarding practices to the role, training and ongoing coaching and mentoring, not only to help them carry out their work more effectively but importantly, to ensure learning is woven into their efforts. In this way, they can effectively respond to the changing needs

¹¹ Statistic Canada 2017 retrieved from <http://www.statcan.gc.ca/daily-quotidien/171025/dq171025b-eng.htm?HPA=1>

¹² IRCC Newsletter 1 November 2017 retrieved from <https://www.cicnews.com/2017/11/canada-welcome-nearly-one-million-new-immigrants-through-2020-119798.html#gs.=hhvNBI>

of the settlement sector. Past studies have identified a need for national standards within the settlement sector; however, it is difficult to say how these studies have affected the career development of settlement workers, or the advice of those who provide career counselling to individuals aspiring to work with newcomers.¹³

This project intended to address this gap by identifying and articulating settlement counsellors' competencies and career pathways. A clear, current description of the role and its competencies is needed to raise the profile of the role, to inform career counsellors so that they can better advise capable individuals, to define career paths within the sector, and to strengthen efforts aimed at recruitment, orientation, training and ongoing coaching and mentoring.

PURPOSE, GOALS AND OBJECTIVES

Summarize the purpose, goals or objectives.

The purpose of this project was to outline the current work of settlement counsellors, to identify the trends and to determine how emerging trends are affecting the role. We developed a simple competency model that captures the settlement counsellors' knowledge, skills, attitudes and qualities, and mapped their career pathways.

Our goal was to provide the managers of settlement agencies with content that can assist them in recruiting, orienting, training and accompanying the settlement counsellors who support the integration process of refugees and immigrants to Canada. In addition, we wanted to provide content that can be used by career counsellors to provide informed career advice to those who aspire to enter the field of settlement.

Did your originally proposed objectives change over the course of the project? If so, detail what objectives changed, how they changed and why they changed (provide sufficient detail to elaborate on specific internal and external factors).

The scope of our project did not change but we conducted our research we realized that there were many different roles that can be identified as frontline settlement workers. Therefore we changed the focus of

¹³ Canadian Council for Refugees 2000, retrieved from http://ccrweb.ca/sites/ccrweb.ca/files/static-files/standards.htm#N_10_

our project from developing a competency framework for “frontline settlement workers” to the more specific role of the Settlement Counsellors. The Settlement Counsellor role can be described as a generalist, therefore our rationale was that by focusing on this role and developing a competency framework for it, we will be able to have key common competencies that could potentially be used for the training and development of other frontline roles in the settlement field.

We also decided to capture the impact of emerging trends on the role of the settlement counsellors, and the competencies that they needed to develop in order to effectively respond to these emerging trends. By focusing on the role of the settlement counsellor, we were able to describe how the role of the settlement counsellors is evolving and were able to identify and articulate eight key competencies that capture current as well as emerging competencies for frontline settlement workers.

PARTNERSHIPS AND COLLABORATIONS

Briefly describe intended partnerships and collaborations.

There were no formal partnerships or collaborations as part of this project. There were, however, many relationships developed as part of the project promotion and recruitment phase of the research. We communicated with many individuals across the country to share details about the project and to seek their assistance in identifying key participants. The support of the organizations that participated ranged from sharing the information regarding the project with their stakeholders, to identifying and encouraging their staff and colleagues to participate, and offering space and time for the facilitation of a focus group.

If the project involved collaborating with another/other organization(s), including any not referred to in your proposal, please comment on the collaboration’s effect on the project and how this process influenced you, your organization and your partner organization(s). What role did your collaborator(s) play? How often and in what manner did you meet with your collaborator(s)?

Prior to this project, we had completed several projects for settlement agencies at Toronto North. The Manager of Toronto North Local Immigration Partnership (NTLIP) was and continues to be a great supporter of our efforts in building capacity within the settlement sector. The TNLIP Manager facilitated our introduction to settlement agencies in Toronto. We used the same approach in other parts of Ontario such as the Peel Region, and some rural areas, as well as British Columbia to identify and be introduced

to settlement agencies and settlement managers. This type of collaboration with LIPs and regional umbrella organizations proved essential in identifying and recruiting participants across the country. We remained in constant contact with the agencies that participated in the research, shared our findings with them, and sought their feedback as we continued to further develop the competencies and the infographic. We also approached some of the agencies that had participated in the research and were located in major cities, and asked them to host the focus groups. In addition, every individual and organization engaged through this process received the final research report when it was disseminated. It is possible that some of the organizations will be able to directly benefit from the competency model and the infographic.

We are thankful to all those who participated in our research. The regional umbrella organizations were especially helpful in spreading the word about our research, and introducing us to key stakeholders in their geographic locations i.e. Alberta Association of Immigrant Serving Agencies (AAISA), Affiliation of Multicultural Societies and Service Agencies of BC (AMSSA), Ontario Council of Agencies Serving Immigrants (OCASI), Immigrant Services Association of Nova Scotia (ISANS), and Local Immigration Partnerships in the Greater Toronto Area, Greater Vancouver Area, and Montreal.

Similarly, if you engaged key informants, an advisory or steering committee, who were they and what role did they play in shaping and executing the project?

We did not engage an advisory or steering committee but we utilized key informants such as Local Immigration Partnership Managers, and specific individuals who worked in provincial umbrella organizations. These key informants played two essential roles in contributing and shaping our research project. The first one was to help us gain a general understanding of the most recent developments in the settlement sector in their geographic areas. The second contribution was to open the way by introducing us to key stakeholders i.e. settlement managers and settlement counsellors in their specific region.

What non-financial supports did you request and/or receive from CERIC (eg. marketing, etc.)? How did this impact your project?

The CERIC team assisted us with marketing our presentation at Cannexus19 where we shared our preliminary findings and confirmed that there is interest in the research. In addition, CERIC team provided us with assistance in identifying settlement agencies across Canada to help with both outreach for the research and dissemination of the reports. CERIC also marketed, published and promoted our both the reports, and the career pathway infographic.

In addition, to online marketing of our findings, CERIC team reached out to their networks and organized two roadshows one in Waterloo with 33 participants, and Toronto with 21 participants, and a webinar with 162 registered participants. In addition, CERIC was able to reach out and secure a meeting with IRCC representatives. We continue to have our conversations with IRCC and assist them with insights gained through this research.

All of these efforts were appreciated and recognized as a valuable support from CERIC.

ACTIVITIES AND RESEARCH METHODS

Describe your project's activities and/or research methods.

This research was a qualitative research and it was designed to better understand the settlement sector, its history and how it has evolved, as well as gain a deeper understanding of the role of the frontline settlement counsellors who are the first point of contact with newcomers and play a critical role in the integration of newcomers to Canada. It aimed to raise the profile of this role by mapping career pathways of settlement counsellors and developing key competencies of the role.

To do this we conducted both primary and secondary research in two segments:

1. **Secondary Research - Environmental Scan & Literature Review** (Included data gathered from sources such as academic journals, and research conducted by Canadian and international NGOs and Governmental agencies involved in the field of settlement.)
2. **Primary Research - Qualitative Data Collection**
 - Considering the diversity of roles within the frontline settlement workers, we focused our research on the role of the Settlement Counsellor.
 - Prepared an interview protocol and translated it to French.
 - Collaborated with regional and local umbrella organizations as stated in the above section.
 - Conducted 40 interviews of frontline settlement workers and their managers.
 - After analysis, and synthesis of the interviews data, we developed a set of eight competency statements and mapped out some of the career pathways of settlement counsellors.
 - The summary of findings was presented at Cannexus19 with close to 25 people in attendance. This presentation covered a brief description of the research, outlined what settlement counsellors do, and what their career pathways are. In addition, it introduced eight competencies capturing the current work, and the emerging competencies of the settlement counsellors as a result of the trends and changes impacting the role. At the same conference presentation, we sought the feedback and validation of career counsellors attending the session to ensure the usefulness of the content and insights related to career pathways and competencies of settlement counsellors.
 - Designed an info-graph which captured the content and insights generated from the research, mapping a commonly perceived career pathway of settlement counsellors. This infographic captures the findings of the research relevant to career counsellors.
 - Designed and facilitated five focus groups. One in Greater Vancouver Area, two in Toronto, one in Montreal and one in Halifax. At the focus groups, we sought validation of what settlement counsellors do, the content of the infographic capturing career pathways, and the eight competency statements
 - Wrote a report that captured summary of the findings of the second part of the research.
 - Shared and sought further validation of the competency model consisting of the eight competency descriptions with all the participants in interviews.
 - In the fall, we publicized both the final report and the infographic. We also delivered a webinar to 162 participants, and two roadshows in Ontario with a total of 54 participants. At the roadshows we were asked to provide the infographic as a downloadable document. As of April 2020, the

infographic has been downloaded 32 number of times, and the report has been downloaded 400 number of times.

- Lastly, we captured insights gained and our learning from the whole research project in this report.

Detail your activities, milestones etc. and any changes therein over the project life-cycle. Consider a chronology of actual events/activities and milestones to tell the story of how your project unfolded.

The steps above capture all the activities we undertook during our research. Once the project was approved, we met with our associates and planned the project. Our first task was to start the background research both in terms of articles for the first segment of the research but also finding more about competency frameworks being used in the settlement sector. Early on, we found that Alberta had a comprehensive competency framework that they were in the midst of revising. We were able to contact Alberta Association of Immigrant Serving Agencies (AAISA). We were very thankful when AAISA shared their competency framework and allowed us to reference it in our initial report. In addition, we found out that BC also had at some point in the past developed a competency framework for this role. AMSSA informed us that they also intended to review and revise their competency framework in near future. These two frameworks were both referenced and shared in our initial report which was published on CERIC's website in September 2018 as planned. Due to Alberta's work in this area we slightly adjusted our plans and included some agencies from Alberta in our interviews.

Interviews were conducted from November 2018 until January 2019. We then synthesized our preliminary findings and presented them at Cannexus19. After Cannexus19 we completed the design of the infographic, mapping the career pathways of settlement counsellors. Both the competency model including eight competency statements, and the infographic were presented and validated in focus groups which were facilitated in March and April 2019. Based on the feedback gathered we were able to revise the model and tweak the competency statements. We then shared and validated the competency model with all the research participants.

As applicable to your project, for each of your activities or milestones, detail factors that were helpful, factors that were challenging or presented obstacles and areas where changes were required as a result.

Challenges:

- Building trust and identifying participants outside of Toronto specially in Montreal and BC was challenging. Through persistence and continued networking with our own colleagues and CERIC's network we were able to establish good relationships with several settlement managers who in turn helped the project by hosting the focus groups in their area.

- Initially we intended to personally travel and facilitate all focus groups ourselves. However, as the research progressed, we realized that it may be helpful to have associates both in British Columbia and Quebec to effectively establish relationships and reach out to potential participants. To prevent running out of funds we limited the travel for principle researchers to Toronto focus groups, and Halifax. For interviews and focus groups in BC and Montreal we utilized local associates.
- Conducting this research across Canada at the beginning was challenging but over time we were able to build trust by utilizing local networks in various regions and through them reached out to potential participants.

Helpful:

- Both regional and local umbrella organizations, specially Local Immigration Partnerships were helpful in assisting us better understand and connect with frontline settlement agencies and staff especially outside of Greater Toronto Area.
- Having a fully bilingual associate based in Montreal opened doors for us.
- Spending time upfront to deepen our understanding of the sector, its funding structure and how it has evolved in various regions was very helpful in providing context for our research findings.
- The roadshows and the webinar provided us with a great opportunity to further validate our findings, and identifying those that we could continue to work with in future as well as realizing how timely this project has been.
- Talking to IRCC representative also made us realize that insights generated from this research may prove helpful to the issue of professionalization of settlement workers that the National Settlement and Integration Council is currently addressing.

Clearly state where activities differed or deviated from activities proposed in your application.

By and large we followed our original plan. At times, we were delayed with our timelines and needed to adjust it mainly because we needed to establish relationships in order to effectively engage potential research participants. We also decided early on to focus on the role of Settlement Counsellors, the rationale for which has been explained in earlier parts of this report.

TIMELINES AND DELIVERABLES

Describe your project timeline.

Once the funding was approved, we started the project. The project was intended to take 10 months but due to the need to establish relationships in all major centres and personal circumstances (death in the family) of the one of the principle researchers the project took 13 months to finish. The final report outlining the research findings was delayed by one-month and was submitted in June 2019. Therefore, the overall project was extended by three months.

Were reporting and other deliverables given on time and what possible adjustments needed to be made to proposed timeline given outside considerations (e.g., ethics approval from outside agencies; unanticipated delays or interruptions).

The first segment of the research took four months as planned. The second segment took an additional three months due to the challenges of establishing relationships with potential research participants, and personal circumstances of one of the main researchers.

Describe the intended deliverables from your proposal. List in bullet form all of the project deliverables.

1. A comprehensive literature review, including an environmental scan, related to capacity building of frontline settlement workers in Canada.
2. A general competency framework and initial elaboration of each of the eight competencies of frontline settlement counsellors.
3. A description of the work of settlement counsellors, including educational and experiential requirements, and a map of common career paths.
4. A final project report outlining the results of the project.
5. An infographic highlighting research outcomes relevant to career and guidance counsellors.
6. An article summarizing the findings of the research including the frontline settlement counsellors' career pathways and competency statements to be potentially published in *Careering Magazine* or other publications as deemed by CERIC and other umbrella organizations.
7. A PowerPoint presentation summarizing the research findings including frontline settlement worker career pathways, and competency statements was presented at the Cannexus19 and will be used for other conferences in near future.
8. Content for a webinar presented to CERIC's members on November 22, 2019.

If different from what was initially stated, specify and explain. Provide details of each project deliverable in the Appendix.

Our deliverables were not different.

Describe any deliverables including specific documents or learning materials developed over the course of the project. Detail the target audience(s) for each deliverable.

As part of our deliverables we developed:

- a competency model that was and will continue to be shared with those who work in the settlement field either as a manager or as a settlement counsellor;
- an infographic outlining career pathways of settlement counsellors which is intended to be shared with career counsellors.
- PowerPoint presentation that was shared with Cannexus19 participants.
- PowerPoint presentation for roadshows and the webinar outlining the research findings.

If your project involved data collection, including surveys, focus groups, participant's feedback, quotes that informed product development, etc. provide some details – purpose of the data collection, what type of data was collected? Where was data stored?

Prior to participating in the project, a letter of introduction was sent to the participants seeking their informed consent. This letter introduced the project, outlined its objectives, and explained the data collection process. Participants were informed that data was collected during both interviews and focus groups by taking notes, and that the notes were not kept after the final analysis and synthesis of the data. The privacy of participants was respected by keeping their identities confidential. We only used aggregated data, and did not use quotes that revealed the identity of the participants. Participants were also informed that for the duration of the research data in the form of interview and focus group notes was stored in the personal files of principle researchers and was only accessed by them. After the completion of the interviews and focus groups the data was aggregated, synthesized and original notes were discarded. In addition, participants were informed that they were not obliged to participate and could withdraw from participation at any time during the project.

Were there any ethical considerations? Any challenges or setbacks? How did you mitigate these?

- To ensure that settlement counsellors had voluntarily participated and mitigate the risk of them feeling pressured or compelled to participate by their managers, at the beginning of each interview and the focus groups we emphasized the voluntary nature of their participation and explained the option to withdrawal and assured them of the confidentiality of their comments.
- Similarly, the interviews were conducted individually and if at times in groups, participation was limited to either settlement managers OR settlement counsellors. We did not mix the group.
- At the beginning of each focus group after explaining the confidentiality and the data restoration process, participants were given the opportunity to withdraw if they wanted to in order to mitigate the risk of any internal pressures to participate.

If you had an opportunity to do this project again, are there things that you would do differently?

If we had to do this again, we would not underestimate the importance of building trust and having established relationships in each geographic location to not only recruit participants in the research but to be able to have an open discussion about the challenges and trends that are impacting the sector in general. This understanding will help in making better estimates of what it takes to conduct this type of research in a tight timeline. Otherwise, in terms of the steps we took, we would not do anything differently.

MARKETING AND DISSEMINATION

How will the initiative be promoted and marketed to its intended audience?

We devised a marketing and promotion plan with the CERIC team. We implemented this plan in the Fall of 2019. We used various methods of dissemination of our key deliverables i.e. the competency model and the eight competency statements and the infographic. We shared the final report as well as the infographic with all research participants and CERIC's network.

In addition, through two roadshows held in Waterloo, and Toronto, as well as a webinar and an article published in *Careering* Magazine we reached out to a broader audience and shared our research findings.

Our main target audience were those who work in the settlement sector and career counsellors. However, our research has been timely and has generated insights that has been of interest to IRCC who is currently working with the National Settlement and Integration Council to look into the issue of professionalization. We will continue to share our insights with IRCC and assist their important work in this area.

How were deliverables shared? How did you market and/or disseminate outputs/findings/learnings of the project?

- The environmental scan & literature review report were published by CERIC on their website. We also provided the link to many people in our network and all those who expressed an interest in the research. This report was well received, and many commented on how comprehensive it was.
- As part of our research we shared the competency model and the eight competency statements with the 40 people who participated in the interviews and sought their feedback. Participants concurred that the competencies and the info-graph captured accurately the work that settlement counsellors do. They also commented on the simplicity and accuracy of the competency model. We will continue to share the findings with our contacts in settlement agencies and organizations that assisted us along the way.
- The infographic content were shared and validated at Cannexus19 and the focus groups. The info-graph included: what settlement counsellors do, what qualities, skills and knowledge is needed to enter the field, and possible career paths for those who aspire to pursue a career in the settlement field. Everyone who provided feedback commented on the accuracy and comprehensiveness of the content captured and presented in the info-graph. Some individuals commented that they believe this is the first time they've seen a possible career path for settlement counsellors.
- The final report, infographic and an article summarizing the findings of the research in *Careering* Magazine, are all published on CERIC's website and can be downloaded. By April 2020, the final research report has been downloaded by 393 people and the info-graph has been downloaded by 32 of people.
- We also shared research findings in two roadshows in Ontario. The one in Waterloo was well received and had 33 participants and the one in Toronto 21 participants. In addition, there were 162 registered participants for the webinar.

For Research Projects, tell us about the status of your research being published in the CJCD (either already published at time of final report submission or publishing in the journal is in progress).

With the assistance of CERIC's team we wrote an article summarizing the research findings. This article was published in Career Magazine on April 22, 2020.

What was your plan? What strategies did you use? What were critical factors that impacted the successful implementation of your plan?

Our plan was to work closely with CERIC to share the research findings with their diverse and wide network. We delivered a webinar and two roadshows as well as published our reports, and an article in *Careering Magazine*. One of the critical factors were that from the beginning we built a list of settlement agencies across the country that provided us with a good base for dissemination of our research findings. Another critical factor was that CERIC's team members executed a very effective outreach and marketing strategy to reach a large and diverse number of people within their own network. This proved successful in the sense that we had many showing interest in the roadshows and the webinar.

Was the dissemination successful? How could you tell?

The comprehensive and diverse dissemination strategies of using roadshows, webinar, and published reports and articles to a wide-range and diverse group of individuals in CERIC's network was very successful. The comments and responses that we have received overall shows that this research captures the work of the settlement counsellors and that both the competency framework and the infographic capture the day to day responsibility and the emerging competencies that settlement counsellors need to develop in order to be effective in their work.

The number of times that the research reports have been downloaded shows the interest that this research has generated and it also shows that we have been successful in reaching a wide range of people that find the findings relevant. As of April 2020:

- The Competencies of Frontline Settlement Counsellors in Canada - Research Report - 400 downloads
- The Competencies of Frontline Settlement Practitioners in Canada: A Background Research Report - 364 downloads
- Settlement Counsellor Career Pathway (Infographic) - 32 downloads

In addition, the fact that IRCC has shown interest in the findings and finds the insights generated useful in the work that they are currently doing to address the issue of the professionalization of the settlement worker, is a great indicator that the research is relevant and useful, and that we have been able to reach the right target audience in disseminating the findings.

REVENUE GENERATION / COST RECOVERY

If you had developed strategies for generating revenues within the project, describe these and speak to how you did in relation to how you expected to do (as per your proposal).

Not applicable.

EVALUATION AND MONITORING

Explain how you will know whether the project has achieved success.

We had identified specific targets for the number of interviews and focus groups. We consider the fact that we surpassed these targets and engaged more research participants from diverse settings as a success. Incorporating diverse views and regions in our final deliverables increases the applicability of the findings to diverse settlement agencies in both rural and urban areas. This in itself is a measure of success. Another measure of success was when at the roadshows we were asked to provide the infographic as a stand-alone document so that it can be shared with others. This was an indication of not only the accuracy of the information gathered on the info-graph but also its usefulness and relevance to those who work in the settlement field.

In addition, we had set both quantitative and qualitative targets for measuring the success of the project in the first year following the completion of the project.

- Raising capacity in 20-25 settlement agencies by helping them incorporate the competencies and career pathways in their work, according to their own circumstances and reading their own reality.
- Engaging 12-15 settlement managers and assisting them to explore how to incorporate the competencies in their training and development goals and objectives.
- Survey career counsellors and measure their interest in using the info-graph in their work.

We now realize that it takes time to establish relationships with settlement agencies and managers. Added to that the high turn-over rate and lack of resources in this sector may make this even more challenging, but from our experience and the interest shown in our project, we are confident that we can overtime reach some of these goals now that we have successfully disseminated the project findings and built interest. We are thankful to the consistent efforts, and diligent attention of CERIC's team members to the dissemination of research findings. Our long term goal of raising capacity in settlement agencies is more within reach due to the interest that our research has generated.

What evaluation tools did you use? How did you evaluate? Describe the inputs to the project, the process and the results, including the impacts.

Throughout the project we validated our findings at Cannexus19, and the focus groups. After each focus group we synthesized the input of participants, incorporated their feedback in the competency model and infographic, and then validated our findings in the subsequent focus group. In addition, at the end of the project we shared the competency model and the info-graph with all the research participants and further sought their input. In this way, we continuously evaluated our findings throughout the project.

The interest that was generated in roadshows and the webinar and the published reports confirms that the research has been timely and relevant. Also the interest shown by IRCC in the findings is also a good measure for success of the overall research.

Describe the connections between evaluation tools you used for the project and the goals you have identified.

Our main evaluation tool was to collect feedback throughout the project to ensure that our findings are relevant and accurate. This allowed us to ensure that the final research findings were representative of what we had heard. This was crucial if we were to meet the goal of developing a competency framework that could be used as a foundation for developing training materials. We think that we have successfully reached this goal because we have listened to the feedback, and revised and evaluated our findings as we received feedback throughout the project.

What specific marketing activities (website tracking; presentations; exhibits; blog posts; Twitter) were used in terms of project evaluation metrics?

We had two roadshows with a total of 54 participants, and a webinar with 162 participants. At Cannexus19 we had 25 participants at our session where we shared the research findings. We have published two reports and an article. As of April 2020:

- The Competencies of Frontline Settlement Counsellors in Canada - Research Report - 400 downloads
- The Competencies of Frontline Settlement Practitioners in Canada: A Background Research Report - 364 downloads
- Settlement Counsellor Career Pathway (Infographic) - 32 downloads

You provided three letters of support from key stakeholders. What impact did your project have on them? Was the impact different from what they anticipated from the project?

The impact described by our support letter writers was mostly in terms of the need for and the value of a competency framework in building capacity in the sector. As such, we expect that over time as we reach our goals of engaging settlement managers, we will be able to measure the impact of the project on those who provided us with a reference as well as others.

IMPACT ASSESSMENT / OUTCOMES

Explain the intended outcomes from your proposal and describe data collections methods and tools.

We have thought of the following ways to assess the project's effectiveness:

During the project:

To ensure that the project is on track and the findings are relevant to those who are participating in the research and ultimately represent the population that would be most impacted by the project findings, we sought in-person feedback after each focus group. This feedback was gathered by facilitating a reflection segment at the end of each focus group with the participants and providing them with an opportunity to reflect on their actions and generate as well as share any new insights and learning they may have gained. The feedback was then integrated into and further validated in the next focus group. Similarly, we reflected after each focus group with our associates to fine tune, adjust and adapt questions in light of the data gathered. In this way the projects effectiveness and the approach taken was evaluated throughout the project.

Final stage of the project:

A summary report of the findings i.e. the eight competencies were circulated back via email to the all research participants to ensure that the synthesis of data collected was accurate, representative and relevant to the settlement workers and their managers. Participants provided input and responded by email.

In addition, career and guidance counsellors attending Cannexus19 commented on the preliminary findings. During roadshows and the webinar we ascertained the relevancy of the career path infographic.

The interest in this was high, and as such we were asked to provide a larger downloadable version available on CERIC's website so that it can be readily available to those who wanted to use it.

Ongoing & long term:

Calience and eCaliber will continue to work within the settlement sector and intend to use these findings in their future work. Through a long-term process of study, action, and reflection with those working in this sector we intend to fine tune the competencies and career pathways and build capacity within the individuals and organizations working in the sector. In this way we intend to continuously assess the relevancy and accuracy of the findings.

We are continuing our conversations with IRCC representative and are scheduled to share our insights with the National Settlement Council working group.

What were the actual outcomes of the project?

The main outcomes of the project were greater awareness of what is available in terms of competency frameworks and identifying the gap for a comprehensive, generic and simple to use competency framework that has been developed based on input from settlement agencies across the country in both rural and urban areas.

In addition, the research findings identified the career progression of those who enter the settlement sector and raised the awareness of career opportunities and possible career pathing and progression within the settlement sector.

What were your measures of success? Be specific. For example, in the case of a website project, talk about the usability and navigability of the site, speak to the content of the site, etc. If tools or guides were being developed, provide examples of tools and plans for the use of the guide.

- One of our key measures of success was when those who participated in our research told us that the competency model made sense, it was simple and captured what the settlement counsellors do. The consistency of this feedback across the country was a huge measure of success.
- At Cannexus19, and in focus groups individuals confirmed that the information on the info-graph is accurate. In addition, during the roadshows, we were asked to provide the info-graph as a stand-alone document so that it can be shared with others. This was an indication of not only the accuracy of the information gathered on the info-graph but also its usefulness and relevance to those who work in the settlement field.
- Another measure of success is the interest that IRCC is showing in the insights that we have gained through this research to inform the work that the National Settlement Council working group is doing in regards to professionalization of the role of the settlement counsellors.

Were there any unexpected outcomes or unintended consequences?

One of the unintended consequences is that insights generated in this research may be useful to the work of IRCC in the area of professionalization of the role of settlement counsellors.

KEY FINDINGS / INSIGHTS

Share your key findings from the project. Provide any insights and any learning from the project.

- One of our key findings in this research was how much the landscape of immigration has changed during the last few years both in terms of the number of immigrants Canada hopes to attract, as well as the increased number of new programs and policies that enable individuals to immigrate to Canada. These changes have a direct impact on the role of settlement counsellors, not only in terms of what they do day to day but also how their managers prepare them to address the many changes that happen in the immigration policies etc. Therefore one of our key findings were the need for emerging competencies to address these challenges and for having a simple, accessible and generic competency framework that can be used by managers to recruit and coach and mentor settlement counsellors who report to them.
- Another key finding was identifying education background, experience and skills that are needed to be hired into the role of settlement counsellor, and to advance one's career in the sector.
- We also were told by many of the participants that over the past few years, the funding for training and development in the sector has been cut substantially even though the complexity of the role has increased due to the changes in immigration policies.

Provide any reflection on project implementation process and learnings from the project.

One of our key learning was the importance of establishing trust and building relationships with key stakeholders in various areas of the country in order to have meaningful participation in our research. Some areas were more open than others. We had under-estimated the time that it would take to do this. We intend to continue to build on these relationships and find ways to strengthen them through time.

Did the project partnership funding lead to any capacity-building within your organization? Within your community stakeholders?

Through this project we were able to:

- expand our reach beyond one or two geographic areas.
- better understand the needs of settlement organizations in both urban and rural areas.
- develop a competency model that can be a good foundation for us to develop training content.
- increase our knowledge of the sector and our network within it.
- refine our own understanding of competencies and how they can be used as a practical tool by individuals.
- become much more aware and conscious of future trends and the way in which these trends impact the settlement sector.

How might the learnings from the project impact your service, methods and future thinking?

The findings from this project will be the foundation for training modules that we are hoping to develop and use to train settlement workers in order to better carry out their responsibilities and to respond to emerging trends.

If the project involved collaborating with another/other organization(s), what lesson(s) did you learn about your collaboration process?

One of our main learnings in this regard was that we need to build strong relationships with the organization and not just the individuals working in the organization. To do this, we realized we need to have strong relationships with several staff members in the organization so that in the event of staff turn-over we can continue our work.

If your project included revenue generation/cost recovery strategies, what lessons did you learn?

Not applicable.

Did you undertake any anticipated or unanticipated political activities with funds provided for this project partnership?

No.

NEXT STEPS AND RECOMMENDATIONS

What next steps would you recommend to enhance work done through the project or contact information for those interested in their area of work or, again, future projects to continue to support evaluation?

Next steps for us will be to share the competency model with settlement agencies and to develop training modules based on these competencies so that both managers and settlement counsellors can benefit from them.

In terms of the sector as a whole, we hope that many other projects start and/or continue to address two key issues:

1. The issue of building capacity in the settlement sector - there is a need to build capacity in the sector with the aim of empowering and enabling those who work in the sector to respond more effectively to the complexity and the diversity of the issues that newcomers to Canada face in their integration journey.
2. Raising the profile of the positions in the settlement sector namely frontline workers - there is a need to continue to attract, hire, retain and advance individuals in this sector so that despite all the pressures of the position, qualified individuals can aspire to enter and thrive in this field.

APPENDIX A

Participating Agencies by Region:

Ontario

- Brampton Multicultural Community Centre
- Centre for Immigration and Community Services
- OCASI
- Rural Organization in Ontario
- Thorncliffe Neighborhood Organization
- Timmins and District Multicultural Centre
- TR Leger Immigration Services Cornwall
- University Settlement Services
- Working Women
- YMCA Brantford
- YMCA – North York

British Columbia

- Immigrant Services Society of British Columbia
- The Affiliation of Multicultural Societies and Service Agencies

Nova Scotia

- Immigrant Services Association of Nova Scotia

Alberta

- Alberta Association of Immigrant Serving Agencies
- Catholic Social Services

Quebec

- Youth Employment Services
- Ometz Community Services, Employment & Immigration

Manitoba

- Eastman Immigrant Services

APPENDIX B

Total number of Research Participants:

ROLE	Nova Scotia	Quebec	Ontario	Manitoba	Alberta	British Columbia	TOTAL ROLE
Manager/ Director	1	2	11	1	2	1	18
Counsellor	8	7	20		2	6	43
Regional	1		2		5	2	10
Total Region	10	9	33	1	9	9	71

Please note that 40 individuals were interviewed, and a total of 39 individuals participated in focus groups. Since some individuals participated in both focus groups and interviews, we have counted a total of 71 individual participants in the research.