The Competencies of Frontline Settlement Practitioners in Canada

A Background Research Report

Calience Research and Consulting

eCaliberGroup
TRANSFORMATIVE TALENT MANAGEMENT

Prepared by:

Iren Koltermann (eCaliber Group)

Daniel Scott (Calience Research and Consulting)

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INTRODUCTION

Migration has been an integral part of humanity's experience throughout the whole of its history. In their thoughtful book *Exceptional People: How Migration Shaped Our World and Will Define Our Future*, Ian Goldin, Geoffrey Cameron and Meera Balarajan touch on the decision to migrate, which they make clear "confounds simplistic analysis":

> People generally move in the context of unusual circumstances—rapid social and economic change, economic or political distress, or the availability of new opportunities—that make the prospects of migration attractive, despite its inherent costs and risk. The migration decision is nested within a broader set of family considerations, social networks, and political and economic conditions. Migration does not usually begin and end with one choice, however—it involves a sequence of decisions that are influenced by the changing values and goals of the migrant in response to his or her conditions. Social networks, timing, context, history, risk, and opportunity all influence the migration decision.[1]

While people have always migrated, Goldin, Cameron and Balarajan note that globalization in all its dimensions is drawing the regions of the world into an interdependent and interconnected community making "modern migration fundamentally different in its geographic scope, frequency, and intensity."[2] The broad strokes of this analysis is supported by data collected by the United Nations showing the number of international migrants alone reaching 258 million people in 2015, a 69 percent increase compared to 1990.[3] Migration will continue to be a dominant feature of global development.

Within this global context, Immigration, Refugees and Citizenship Canada has adopted a multi-year Immigration Levels Plan that will welcome to Canada 310,000 new permanent residents in 2018, 330,000 in 2019 and 340,000 in 2020.[4] These are the highest levels of immigration since the early 1900s when Canada was promoting the settlement of Western Canada.[5] Increasing immigration levels aims to meet Canada's humanitarian commitments and to "stimulate the economy and help alleviate the economic and fiscal challenges posed by the country's aging population and low birth rate."[6]

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[1] Ian Goldin, Geoffrey Cameron, Meera Balarajan, *Exceptional People: How Migration Shaped Our World and Will Define Our Future*, (Princeton: Princeton University Press, 2012), 117.

[2] Goldin, Cameron, Balarajan, 117.

[3] United Nations, Department of Economic and Social Affairs, Population Division (2017). *International Migration Report 2017* (ST/ESA/SER.A/403), p. 1.

[4] Immigration, Refugees and Citizenship Canada, "Notice – Supplementary Information 2018-2020 Immigration Levels Plan*"*, (Ottawa: 2017), https://www.canada.ca/en/immigration-refugees-citizenship/news/notices/supplementary-immigration-levels-2018.html

[5] Statistics Canada, "150 Years of Immigration in Canada", (Ottawa: 2016), https://www150.statcan.gc.ca/n1/pub/11-630-x/11-630-x2016006-eng.htm.

[6] Conference Board of Canada, "450,000 Immigrants Annually: Integration Is Imperative to Growth", (Ottawa: 2017), p. 1.

The economic and social benefits of migration are well documented.[7] Yet, it is also widely acknowledged that these benefits depend on the capacity of the immigration system to welcome newcomers, strengthen their participation in Canadian society, improve their labour market outcomes, expand its absorptive capacity and maintain robust public support for immigration.[8] None of this is easy.

Frontline settlement workers are frequently one of the initial points of contact for newcomers, helping them to settle, adjust, adapt and participate in Canadian society. Settlement workers play a role in strengthening labour market outcomes of newcomers, increasing absorptive capacity of welcoming communities and enhancing public support for immigration. It is reasonable to assume that as immigration levels rise and the diversity of those settling in Canada increases, the value of the service provided by these workers will grow, as will their workload and challenges.

For quite some time, the settlement sector has been working to strengthen the capacity of settlement agencies and practitioners. Stretching back at least two decades, a variety of actors have conducted research and proposed and implemented initiatives to identify best practices and sound standards. More recently some provincial agencies have outlined core or basic competencies of settlement workers. This report – written in support of a project funded by CERIC to enhance understanding of the processes of capacity building of settlement workers – aims to provide a brief description of these proposals and initiatives. Our objective is to better understand and articulate the nature of frontline settlement work, the context in which it is carried out, and to review what research and work has been undertaken toward strengthening the capacity of frontline settlement practitioners.

The first part of this report provides a brief historical overview and current description of the settlement sector and elaborates the current role of settlement workers. The second part presents more specifically the work that has been undertaken regarding the development of competencies in the sector.

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[7] Goldin, Cameron, and Balarajan provide a well-researched discussion of the economic and social benefits of migration in chapter 6 of *Exceptional People*. In the Canadian context, the Conference Board of Canada projects that if immigration levels remain at their current levels, GDP per capita rises, increasing from $50,087 to $62,901 in 2040. See "450,000 Immigrants Annually", Ibid. p. iii.

[8] Conference Board of Canada, p. 29.

PART 1: THE SETTLEMENT SECTOR

Below is a brief discussion of the settlement sector, its general aims and purpose, historical development and current structure. The discussion is not intended to be in-depth but to provide context to better appreciate the current and emerging role of settlement workers and the context in which they labour.

The nature of settlement

The decision to migrate is not one that is ever taken lightly. For some it is a decision forced upon them by civil conflict or persecution; others migrate to reunite with their families; others move in search of educational, economic and social opportunities. The 300,000 people set to arrive in Canada this year have many differences. Their circumstances and personal histories may vary widely one from another. They come from different countries, speak different languages, have moved through different social realities, have different values, customs and practices. Yet they also have much in common. They each are human beings with valuable experiences, talents, capacities and a desire to contribute. They each have concerns, hopes, dreams and aspirations for their future. They will also face many common challenges as they work to settle in their new country. They need to find a place to live, secure employment, which may require further education or training, often learn or become more proficient in a language, make new friends and learn to navigate a new society and culture. The work of settlement is rarely straightforward and requires a great deal of effort and persistence. Newcomers often report feelings of alienation, loneliness and frustration.[9] Many must confront both systemic and incidental xenophobia and racism.

There has been much discussion about the nature and definition of settlement. Different definitions co-exist within the sector. Yet, there are a great many commonalities. A definition frequently cited and for which there is widespread agreement is provided by the United Nations Economic and Social Council: A "gradual process by which new residents become active participants in the economic, social, civic, cultural and spiritual affairs of a new homeland."[10] A similar definition is provided by the Ontario Council of Agencies Serving Immigrants (OCASI): "Settlement is a long-term, dynamic, two-way process through which, ideally, immigrants would achieve full equality and freedom of participation in society, and society would gain access to the full human resource potential in its immigrant communities."[11] Naturally, settlement understood in this way must be viewed as a long-term, dynamic process that most working in the settlement sector understand to take place in number of stages, as newcomers adjust, adapt, and integrate to the new society.[12]

> Richmond and Shields (2005) identify three broad stages in the settlement process. The first stage is the "initial reception", which involves newcomer orientation information and referral services, language training and short-term shelter. The "intermediate stage" is where appropriate employment and long-term housing, and access to education and social rights are supposed to be secured. The "final stage" involves the period when a deeper sense of attachment and belonging to the host society is meant to occur. During the integration process immigrants often are

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[9] Canadian Council for Refugees, "Best Settlement Practices", (Toronto: 1998), p.2

[10] Ibid., p.8.

[11] Ontario Council of Agencies Serving Immigrants, "Immigrant Settlement Counselling: A Training Guide – Part 1", (Toronto: 2000), p. 13.

[12] Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service and Sectoral Standards for the immigrant Services Sector – Discussion Document", (Toronto: 1999), p. 16.

confronted with structural obstacles such as credential recognition, institutional barriers and discrimination.[13]

Similarly, OCASI writes "The settlement process can be viewed as a continuum, as newcomers move from acclimatization, to adaptation, to integration."[14]

It is worthwhile to point out that while the settlement process as a whole is long-term, the sector, and particularly government agencies, often refer to "settlement" as being acclimatization and the early stages of adaptation, when newcomers make basic adjustments to life in Canada, finding a place to live, learning language, securing employment, and learning to find their way in a new, and as yet unfamiliar, society.[15] Sometimes two broad phases are referred to: "Settlement", encompassing the initial to intermediate stages, and "Integration", comprising the final stage.

There is also general acceptance within the sector that settlement is a two-way street involving the adaptation of both the immigrant and the society.[16]

> In the community perspective, settlement is not a one-way street, wherein the entire onus is on the individual immigrant to change, to surrender her beliefs and values in order to more easily be absorbed into the dominant culture. The goal is not the assimilation of newcomers. The goal of settlement is for every immigrant to have full freedom of choice regarding her level of participation in the society. If the immigrant wants to participate actively in the society, there are no systemic barriers preventing her from doing so, and there are mechanisms in place to positively facilitate this process.
>
> This means that the society also must change. It must form and reform in an ongoing process, as new groups enter and challenge the norms of the mainstream culture. This dialectic ultimately benefits everyone, since the needs of the society and its immigrant populations are intertwined.[17]

Historical development of the settlement sector

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[13] John Shields, Julie Drolet, Karla Valenzuela, "Immigrant Settlement and Integration Services and the Role of Non-profit Providers: A Cross-national Perspective on Trends, Issues and Evidence", (Toronto: Ryerson Centre for Immigration and Settlement, 2016), p. 6.

[14] Ontario Council of Agencies Serving Immigrants, "The Settlement Sector", (Toronto: 2000), p. 13.

[15] Ibid. p. 15.

[16] Canadian Council for Refugees, "Best Settlement Practices", (Toronto: 1998), p. 8. See also Ontario Council of Agencies Serving Immigrants, "The Development of Service and Sectoral Standards for the Immigrant Services Sector – Discussion Paper", (Toronto: 1999), p. 16.

[17] Ontario Council of Agencies Serving Immigrants, "The Settlement Sector", p. 15.

The settlement sector is generally regarded as a sub-sector of the social service sector.[18] Its emergence as a defined sector is relatively recent and awareness in the wider community of what settlement work involves and the contribution it makes is still nascent. To provide a comprehensive examination of the historical development of settlement work is beyond the scope of this review, however, a degree of awareness of its evolution provides some insight and appreciation of its current challenges and opportunities and helps us to consider the requirements and possibilities for its future development. This, in turn, deepens the appreciation of the context and environment in which settlement workers labour and the capacities they need to do so.

At the turn of the last century, "there were virtually no services. Immigrants were helped by already settled family members or members of the community or neighbours and to some extent by churches and, later, by settlement houses."[19]

The period around the First World War saw a heightened level of immigration to Canada to support western expansion and meet the calls from business for more labour. The population of Toronto doubled between 1891 and 1911 and by 1920 the cities of Western Canada "reflected the mass migration of people from Europe escaping political and religious persecution, grinding poverty, and repressive class-boundaries."[20] Indeed, between 1901 and 1921 the population of western Canada increased by 1.5 million people. They often had little knowledge of Canada, did not speak English or French, and came with very little financial resources or in-country connections.

During this period, informal services began to be provided for immigrants in the larger cities. Gradually, each ethnic group established its own local society to practice their religion, celebrate their festivals, have music and dance and impart the old culture to Canadian born offspring. In this context, benevolent agencies and settlement houses were established to help protect immigrants from sudden hardship.[21] These were mainly located in the larger population centres and all relied heavily on volunteers. Focus was on helping with immediate needs: providing temporary shelter and provisions and assisting with the search for employment.[22] Settlement work in Canada traces its origins back to these early religious and ethnic agencies. Some church officials and social workers were the only form of settlement workers at this time.[23]

What assistance was provided was done in a paternalistic framework and manner, an expression of charity, of "helping out". Helping immigrants was understood and practiced as a one-way street, without meaningful consideration of the background and circumstances of newcomers. They were expected to change – to be "Canadanized". Educators, civil servants, public health officials, religious leaders and social workers had the official task of assimilating immigrants, of "remoulding the foreigner in their

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[18] Moy Wong Tam, "National Settlement Service and Standards Framework", (Toronto: 2003), p. 9.

[19] Ibid., p. 2. In its review of the development of the sector, the Canadian Council for Refugees also describes the period before the First World War as having few organizations specializing in serving immigrants. What help that was available was offered informally, "although there was some formality in support offered by ethnic associations, benevolent societies, religious institutions and self-help groups of various kinds." Canadian Council for Refugees, "Best Settlement Practices", p. 18-19.

[20] Nuzhat Amin, "A Preliminary History of Settlement Work in Ontario 1900 – Present", (1987), p. 5.

[21] Ibid. p. 6.

[22] Ibid. p. 6.

[23] Ibid. p. 29.

image." [24] Amin provides a number of examples of how removed these early workers were from the reality of the immigrants they sought to serve.

> Typical workers at the settlement houses were women, many of them religious motivated; all of them gave their time and services for free. They spoke only English, were familiar with only Canadian culture and had no understanding or interest in the background and culture of their clients. They were dedicated and well meaning, but untrained for most of their multitudinous responsibilities….
>
> As the teachers were not trained to teach, their students became frustrated and dropped out of the language classes and tried to learn English as well as they could on the streets…. One such well-meaning effort was a mothercraft class held by the Public Health Department at Central Neighborhood House around 1915 for Italian women. All the women who attended the weekly meeting were mothers many times over but were taught how to bathe a baby by a well-meaning worker. [25]

During these decades, immigration to Canada remained quite high and the deficiencies of such approaches became increasingly apparent. During the 1920s, and 30s settlement workers began asking for practical training and an academic base. The University of Toronto was one of the first in Canada to provide training beginning in the 1920s. There was increasing interest in community development and integration among social workers in general, which drew in those working with immigrant populations. [26] The discourse began to change. Appreciation of the need to understand and assist newcomers integrate and do well in their new country heightened.

At the end of the Second World War a large number of migrants arrived in Canada, mainly from Europe. Many newcomers were refugees and many of them were widows and children. [27] Over the next two decades, a host of settlement and immigrant aid agencies were established in Canada to respond to the demands for assistance and support of newcomers. There was also a further rise in the number of ethnic organizations, societies and clubs. Due to the large number of refugees arriving from Europe and their specials needs, the Canadian government started to become directly and meaningfully involved in the work of settlement. The federal immigration department established a settlement service by appointing settlement officers throughout the country to assist in the reception and placement of immigrants and to provide advice and guidance to newly arrived entrepreneurs and farmers. [28] These steps helped give further shape to an emerging settlement sector.

Responding to the increase in immigrants from Asia, East Africa and South America throughout the 1970s and 80s, the federal and provincial governments became more clearly aware that the needs of these newcomers were different from those of earlier immigrants. Government services were expanded as were those of settlement agencies to include interpreting, referral services and health education and support.

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[24] Ibid., p, 6.

[25] Amin, p. 7.

[26] Ibid., p. 29-30.

[27] Ibid., p. 10.

[28] Ontario Council of Agencies Serving Immigrants, "The Settlement Sector", p. 22.

The settlement agencies of the 1950s and 60s evolved into social service agencies with the help of government funding.[29]

> The period 1970 to the present can be looked on as a period of growth and consolidation of the agencies and a period during which there was a natural growth of the voluntary agencies into social service and community organizations. In this period government at both provincial and federal levels began to acknowledge its responsibility toward immigrants. While some services for immigrants were offered during the 1950s, government involvement with settlement work increased greatly over the following two decades in terms of both programs and funding. All the signs are that this involvement will continue.[30]

A great number of settlement organizations trace their history back to the 1970s and 80s. In addition to a rise in the number of settlement organizations, this period also saw an expansion of services to address the varied needs of immigrants.[31] In addition to providing temporary housing, provisions and language instruction, agencies began helping newcomers navigate the administrative requirements. They also provided assistance with interpreting, provided information and referral services, conducted health education and counselling, assisted with trade qualifications and upgrading, supported injured workmen find new employment, and provided counselling, family support, and legal advice.

The expansion of services, made possible largely because of increased funding from government and supported by continuing research by academic and concerned organizations, placed greater demand on those working in what had become a more clearly defined settlement sector. While the number of volunteers remained high, the work was too complex to be undertaken largely by untrained volunteer workers. The need for paid staff was recognized. Settlement workers began to attend formal courses and participated in training to acquire and upgrade their skills. "Workers in the 80s and 90s were still predominantly female, in the middle age range, trained outside Canada and with high levels of education in a variety of disciplines."[32]

The settlement sector today

By the turn of the century, the settlement sector had evolved considerably away from its early roots. The work of settlement had been recognized as a defined field and the value of settlement work became widely recognized. Government involvement in and funding for settlement work was an important contributor to its evolution. Academic institutions began to offer courses, specializations and programs for those wishing to work in the settlement field; and academic interest and research contributed to defining and advancing the field. Settlement organizations, which often traced their roots to small volunteer organizations, matured. Their organizational structure became more sophisticated. With

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[29] Amin p. 19-20.

[30] Ibid., p. 3.

[31] Ibid., p. 10. See also Canadian Council for Refugees, "Canadian National Settlement Service Standards", p. 4-5.

[32] Amin, p. 30.

experience they generated specialized knowledge which led to refining and strengthening their programs and services. The way their work was understood also transformed, from providing charity with the aim of fostering assimilation to being concerned with human well-being and the betterment of Canadian society; understanding that settlement is a two-way process involving changes in the newcomer and host society.[33] Settlement agencies and their workers have been at the forefront of struggle to overcome prejudice in all its manifestations and at learning to provide programs and services that are empowering, culturally sensitive, linguistically accessible and non-intimidating.[34] They are "distinctive in their efforts around emerging immigrant-related issues and community development, thereby playing an active and ongoing role in strengthening civil society."[35]

Today settlement services are delivered by a variety of types of organizations. Jessica Praznik and John Shields provide a helpful overview of the organizations within the sector:

> There are a variety of different types of organizations that provide settlement services. The four main service providers are civil society organizations, school boards, provincial governments and municipal governments. It is important to note that the Federal Government does not provide settlement services themselves, rather they contract out services to third parties.
>
> To further unpack the types of settlement service providers that fall under the civil society organizations category, this section is broken down into five groups. These are not mutually exclusive categories as some organization can be a part of two or more of the categories.
>
> 1.   "Universal" Service Providers: Universal Service Providers are organizations that provide services to both newcomers and those born in Canada….
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> 2.   Immigrant Serving Provider Organizations: Also known as a 'Settlement Agency' or an 'Immigrant Settlement Agency.' These organizations provide direct services to immigrants and can be multi-service or single service providers. These can be further distinguished between five types of organizations: Generic Organizations, Ethno-Cultural Organizations, Linguistic Organization, Faith Based Organization, and Umbrella Organizations.
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> 3.   Umbrella Organizations (Settlement Sector Associations): These organizations bring together the settlement sector in a given region for training, support, advocacy, coordination and more.
>
> 4.   Issue-Based Organizations: A number of settlement service providers provide services based on a specific settlement need or priority issue. Some of the most common settlement needs issue-based organizations focus on employment, language and health.

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[33] See Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service and Sectoral Standards for the Immigrant Services Sector – Discussion Document), p. 9.

[34] Moy Wong Tam, p. 9.

[35] Ibid., p. 9.

5. Colleges and Universities: Post-secondary institutions accept many international students and permanent residents each year, and thus their student services used by newcomers can be considered settlement services.

6. Multicultural Non-Governmental Organizations: These organizations are focused on diversity issues as a whole, however they occasionally receive funding to provide settlement services. These organizations have played a larger role in providing settlement services in rural communities that do not have the traditional settlement agencies available.[36]

Most of the settlement work is carried out by civil society organizations. These agencies have evolved from community-based volunteer groups and now have a board of directors, often voluntary, with paid staff to carry out programs and day-to-day operations, all of which is generally supported by volunteers. The number of these organizations is sizeable.

Immigration, Refugees, and Citizenship Canada (IRCC) is the Federal department that funds settlement services. A 2017 survey of direct service IRCC-funded settlement service providing organization (SPO) gives insight into the sector.

Type of organization:
51% identified as providing primarily social services to individuals and families
29% were an educational institution
8% provided primarily employment-related services
7% identified as a community, ethnic, fraternal, civic and social organization
3% were health-care focussed

Years providing settlement services:
46% have been providing services for 5 to 19 years
22% for 20-29 years
16% for 30 to 38 years
14% for 40 or more years
3% for less than 5 years

Number of clients served:
15% provide services to less than 100 clients per year
12% to 100 to 199 clients
20% to 200 to 499 clients
15% to 500 to 999 clients
25% to 1,000 to 5,000 clients

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[36] Jessica Praznik and John Shields, "An Anatomy of Settlement Services in Canada: A guide", (Toronto: 2018), p 5.

12% to more than 5,000 clients

Human resources
42% have between 1 and 5 full time equivalent (FTE) supporting the provision of IRCC-funded settlement services
17% have 6 to 10 FTEs
13% have 11 to 20 FTEs
19% have 21 to 50 FTEs
9% have more than 50 FTEs

Seventy-nine percent of service providers that access IRCC funding use volunteers to support the provision of settlement services.[37]

The above provides insight into the sector. Eighty-seven percent of organizations have been providing services for less than 40 years; nearly half have been doing so for less than 20 years. This corresponds to the development of the sector over the past 70 years. While there are large organizations serving thousands of clients each year, a clear majority are small organizations with less than 10 FTEs. This reflects the capacity of the sector to provide a variety of specialized services to specific populations. All rely on a pool of volunteers to support programs and service delivery.

There are several strengths to this general approach of having predominantly small, community- based organizations. They are rooted in the community or population they serve; it allows for a democratic and pluralistic participation of community representatives in decision making; immigrants themselves often become involved in the organizations and participate in service delivery, management and governance.[38]

A 2010 study commissioned by the Canadian Immigrant Settlement Sector Alliance identified the skills and knowledge possessed by settlement agencies being embodied in four strategic capacities that are unique to the sector:

- An ability to comprehensively assess client needs and to assemble a bundle of services to address those needs, cutting across program silos;
- An ability to focus on families rather than individuals as the 'unit of analysis';
- A place-based ability to channel services to neighborhoods and promote 'bridging; between mainstream and newcomer communities; and
- An ability to bring together services in times of crises.[39]

Settlement program clients

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[37] Immigration, Refugees and Citizenship Canada – Evaluation Division, "Evaluation of the Settlement Program", (Ottawa: 2017), p. 9-10.

[38] Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service and Sectoral Standards for the Immigrant Services Sector – Discussion Document", p. 11.

[39] Meyer Burstein on behalf of Canadian Immigrant Settlement Sector Alliance, "Reconfiguring Settlement and Integration: A Service Provider Strategy for Innovation and Results", (Vancouver: 2010), p. 1.

A comprehensive analysis of settlement program clients was carried out by IRCC in 2017. During the 2016-17 fiscal year, 412,392 unique clients used at least one settlement service, compared to 362,661 during the 2015-16 fiscal year. Twenty-eight percent of these clients were admitted as refugees, 26 percent as economic spouses and dependents and 24 percent sponsored family. Of the 412,392 unique clients, 27 percent were admitted to Canada in 2016, 15 percent in 2015, 10 percent in 2014, 9 percent in 2013 and 9 percent in 2012.[40] Those using settlement services appear to draw on services over a number of years.

The following comments presented in the report are helpful in appreciating the use of settlement services;

> Regarding the proportion of newcomers that need Settlement services, although roughly 39 percent of newcomers accessed at least one IRCC-funded Settlement service in their first 2 years in Canada, evidence from the Settlement Client Outcome Survey indicated that many Settlement clients make use of supports beyond IRCC-funded Settlement services (e.g., family and friends, participating in community events, informal training, websites and publications, etc.). This suggests that the same Settlement services are not needed for all newcomers to the same extent and for the same duration. As all IRCC-funded Settlement services are accessible without charge to all permanent residents regardless of income, the current design of the Settlement Program enables newcomers to make use of all available services at their disposal to improve their knowledge and skills.
>
> Conversely, for the almost two-thirds (61 percent) of newcomers who did not access IRCC-funded Settlement services in their first two years of coming to Canada, it is possible that some were either unaware of their existence, unable to access them due to barriers (i.e., lack of transportation, need to find a survival job) or limited service offerings in their area. However, it is possible that at least some of these individuals that did not access IRCC-settlement services, did not feel they needed the services (i.e., their needs were met or fulfilled through other means/sources of information).[41]

It should also be pointed out that immigrants may also access other services provided by civil organizations that are not funded by IRCC or that are indirect services.

Research has shown that "newcomers who are the most vulnerable with more limited social capital resource are the ones who appear to benefit most."[42] IRCC data suggests that they are also the ones who most access these services, with 28 percent being refugees.

Programs and services

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[40] Immigration, Refugees and Citizenship Canada – Evaluation Division, p. 2-3. See also, Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service Sectoral Standards for the Immigrant Service Sector – Discussion Document", (1999), p. 9.

[41] Immigration, Refugees and Citizenship Canada – Evaluation Division, p. 18.

[42] John Shields, Julie Drolet, Karla Valenzuela, "Immigrant Settlement and Integration Service s and the Role of Non-profit Providers: A Cross national Perspectives on Trends, Issues and Evidence", (Toronto: 2016), p. 21-23.

There have been various categorizations of the programs and services offered by settlement agencies. IRCC identifies three types of services: direct service delivery, support services, and indirect services.

1. Direct Service Delivery:

   - Needs Assessments and Referrals: are conducted to assess newcomers needs and link them to appropriate settlement and community-based services.

   - Information and Orientation Services: are offered to newcomers to provide relevant, accurate consistent, and timely settlement-related information and orientation that is needed to make informed settlement decisions, as well as promoting an understanding of life in Canada.

   - Language Assessments: are conducted using a Canadian Language Benchmark or Niveau de competence linguistique canadiens based tools to determine the official language ability of newcomers for placement in language training program.

   - Language Training: aims to provide adult newcomers with settlement content-based language instruction so that they may acquire English or French language skills they need to contribute to the Canadian economy and integrate into their communities.

   - Employment Related Services: aim to equip newcomers with the skills, connections and support needed to enter into the labour market and contribute to the economy.

   - Community Connections: include activities to support the two-way process of integration on the part of newcomers and their host communities.

2. Support Services: services aimed at helping address barriers newcomers face in accessing settlement programming: Care for Newcomer Children, Translation, Transportation, Interpretation, Disability Support, and Crisis Counselling.

3. Indirect Services: include projects that support the development of partnerships, capacity building and the sharing of best practices among SPOs. For example, indirect projects may focus on developing new and innovative interventions, updating training content, conducting research, creating new tools as well as curricula, etc.[43]

The role of settlement workers in general

The structure of the settlement sector – comprised of hundreds of organizations of different sizes, with different focuses and capacities – shapes the definition of roles. Two factors impact the scope of work of settlement workers. One is the size of the organization for whom they work. In smaller organizations, settlement workers are often more generalists, shouldering a wider array of responsibilities and

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[43] Immigration, Refugees and Citizenship Canada – Evaluation Division, p. 2-3. See also, Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service Sectoral Standards for the Immigrant Service Sector – Discussion Document", p. 10.

performing a great spectrum of services. In larger organizations workers tend to be more focussed or specialized in their role. The second factor is the background, skills, attitudes and inclinations of the individual settlement worker.

The following two descriptions, one by OCASI and one by Welcome BC, are complementary and help provide a description of the major responsibilities and functions of settlement workers in general.

OCASI identifies the major responsibilities of settlement workers as:

- Assist clients with the intake process, assess client needs and provide settlement and adaptation services to clients as required.

- Provide interpretation and translation to clients as required.

- Facilitate access by providing link between clients with specific settlement needs to available resources in the community, social services, professional services and government programs.

- Do case advocacy on behalf of clients with institutions, landlords etc. and assist clients in filing appeals and complaints.

- Conduct group and individual orientation and counselling on variety of settlement related topics such as, housing, education, transportation, employment etc.

- Do outreach to assess community needs, promote programs in the community and participate in networking and coalition building with other service providers, agencies, communities, organizations and institutions providing service to clients.

- Recruit and train volunteers to work in programs and to provide supervision as required.

- Maintain client records, program statistics, and reports and provide regular updates to the Executive Director / the program Co-ordinator / the funder, as required.

- Assist with fundraising activities.

- Participate in staff meetings, case management sessions and committees.[44]

Welcome BC describes settlement workers as providing:

> Frontline services to immigrants, refugees and their families, to assist them to navigate and access BC systems to ensure they successfully settle and integrate into BC communities. In BC,

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[44] Ontario Council of Immigrant Serving Agencies, "Immigrant Settlement Counselling: A Training Guide – Part 1: The Settlement Counsellor", p. 19-22.

settlement workers work primarily in community based non-governmental agencies. The role of the settlement worker includes the following responsibilities.

1. Assessing the needs of service users.

2. Providing quick information and referral services in response to inquiries for information, information on an upcoming event, or a referral to a specific settlement service and any other community or government services.

3. Providing orientation services that provide service users with an overview of BC society and service systems that can support their initial settlement needs.

4. Provide supportive settlement counselling to support individual service users/service user families to navigate service systems (e.g. social, legal, educational, economic, health); settlement workers limit their counselling to providing information, advice, referrals and other resources to address settlement, adaptation, or integration needs.

5. Assisting service users to access services by providing them with support to understand and to obtain other settlement or non-settlement services….

6. Providing life skills and education for the purpose of providing service users with the knowledge and skills necessary for successful living in a new social and cultural environment.

7. Managing the cases of service users participating in the Guided Pathways Process: as Guided Pathways coaches, settlement workers support service users in preparing an action plan with timeframes, milestones and outcomes for achieving their settlement goals.

8. Form-filling only for the purpose of accessing a service or a program (e.g. applying for child care subsidy or obtaining a health card).

9. Making community connections by providing individual and family service users with opportunities to connect with non-immigrants and longer-term residents, services, and events in the broader community to create opportunities for newcomers to interact with longer-term residents in their living and work environments, and to learn the norms and cultures of the host society.[45]

It is clear from the above descriptions that the skill range of these workers is wide and the nature of the work demanding. They work with a multifaceted clientele with diverse and evolving needs.

To summarize: In the initial phase of contact, settlement workers provide "orientation to the new environment and access to housing, jobs and services, as well as to deal with culture shock and stress and anxiety about being in a new environment." They "provide orientation to basic health care and human

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[45] Welcome BC, "Settlement Services Training - Module 2: Explaining Immigrant Settlement to Non-Settlement Service Providers", (2013), p. 19-22.

services, and linguistic and cultural interpretation to facilitate interaction." Over time, settlement workers may be "called upon to do casework counselling with immigrant families who experience breakdown, to help develop positive mechanisms for coping with change, or to advocate for clients caught in the intricacies of bureaucratic systems. Mainstream service institutions depend on settlement counsellors to cover gaps in their services, such as the lack of culturally appropriate counselling. They also use settlement counsellors as trouble-shooters when interactions with immigrant service users become complicated." Finally, settlement counsellors function as community mobilizers and organizers and as a public education on issues such as human rights, anti-racism, etc."[46]

Specific roles of settlement workers

Numerous roles for frontline settlement workers, which can be thought of as a somewhat generic term for those who interact directly with newcomers, have evolved. While job titles and descriptions vary, they tend to fall into a handful of functional categories: Intake Worker; Settlement Worker; Settlement Counsellor, Language Assessors; Job Developers; and Employment Counsellors. In some organizations there may be overlap among these categories and it is not uncommon that one individual may carry out the functions of more than one of these areas. However, these are relatively well-defined functional areas that match IRCC funding channels and can be discussed independent of one another.

The focus of this project is on the functional role of settlement counsellors, who, while not usually the first point of contact for a newcomer, address a broad range of needs and issues with varying degrees of depth, depending on the requirements of the situation. Settlement counsellors are generalists. Most counsellors who fit this description work in community-based, non-governmental agencies. The aim of this research is to better understand how these workers guide the socio-economic adaption of newcomers, to explore relevant competencies of these workers, and to map their career pathways.

Profile of settlement workers

What, then, is the general profile of a settlement worker in Canada?

A 2006 study by the Social Planning Council of Toronto and the Family Service Association reported that over 86 percent of workers in Toronto's immigrant and refugee seeking sector are women, that 75 percent immigrated to Canada and 63 percent are racialized, addressing the dual phenomena of over representation of women in the sector and the racialization of the settlement sector (Wilson, 2006).[47] An earlier survey of settlement workers across Ontario conducted by the provincial government also found that practitioners are predominantly female, (75.9 percent), immigrant (68.7 percent) and university educated (62.7 percent). The majority are bi- or multi-lingual.[48] This description of frontline workers is in

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[46] Ontario Council of Immigrant Serving Agencies, "Immigrant Settlement Counselling: A Training Guide – Part 1: The Settlement Counsellor", 2000, p. 46.

[47] Sita Jayaraman, "Immigrant Women Workers in the Settlement Sector: Niche Employment or Occupational Segmentation" A comparative Study of Germany and Canada", (2014), p. 35.

[48] Ontario Council of Immigrant Serving Agencies, "Immigrant Settlement Counselling: A Training Guide – Part 1: The settlement Counsellor, p. 39-41.

contrast to managerial positions that tend to be dominated by white women. A 2009 study by The Institute for Governance of Private and Public Organizations and York University found that among 240 organizations 91 percent of executive directors were white.[49]

Regarding remuneration, Settlement Counsellors would likely be categorized in the National Occupational Classification (NOC) under 4212, "social and community service workers." Statistics Canada data for 2015 reports the median salary of these workers as $37,775 per year and the average salary at $38,503.[50] The NOC categories are, however, broad. Salary reports from job websites such as neuvoo.ca and payscale.com, report a salary range from $35,000 to $58,000 per year. The next phase of our research will include collecting information about salary levels and expectations. Job security and advancement are issues among settlement workers. A great many positions in the settlement services sector are short-term and tied to annual or tri-annual funding agreements. Larger organizations do offer a higher degree of security. There are not often opportunities for advancement. The absence of clear career paths and lack of funding for professional development makes career progress a challenge.

One final relevant point has to do with the growing professionalization of the sector. Over the past two decades, a number of Canadian colleges and some universities have begun offering specialized certifications and full programs for the education and training of those entering the settlement sector. Sector specific education is generally a requirement for employment positions, but many agencies employ those who do not have specific qualifications, because of their abilities with specific language and/or culture. This development has led to a growing tension "among workers who see settlement as a cause and those who seek this sector as a career."[51] There is concern that "professionalization may further marginalize and inhibit career advancement opportunities for racialized immigrant women who have years of experience in the sector, but no formal education."[52]

Concluding discussion of the settlement sector

The above discussion, while by no means comprehensive, provides background on the settlement sector to enable a consideration of the context in which settlement workers act. We conclude this section with a brief analysis of certain aspects of the sector to provide further depth of understanding into its strengths and challenges.

The approach to providing settlement assistance through a large network of civil society organizations, mostly small, non-profit entities serving particular populations, has a number of inherent strengths. One is the "broad range of organizations" that can be mobilized, allowing them to "shape themselves to meet the specific needs of particular populations of clients and thus enhancing the potential reach and effectiveness of the services provided."[53] Such settlement organizations are rooted in the community they serve, resulting in a welcoming environment and broad community participation. They therefore have the trust

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[49] Bradshaw, P., Fredette C., & Sukornyk, L. "A call to action: diversity on Canadian not for profit boards", (2009: Toronto: The Institute for Governance of Private and Public Organizations & Schulich School of Business, York University), p. 15.

[50] Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016356.

[51] Sita Jayaraman, p. 36.

[52] Sita Jayaraman, p. 36.

[53] John Shields, Julie Drolet and Karla Valenzuela, p. 21.

of the people they serve and can identify and respond to persistent and emerging needs. It allows for both a holistic and diversity of approach in identifying and providing services. It has also been argued that the approach is cost effective – as these organizations generally have low overheads and benefit from significant community contributions, especially volunteers – and accountable, as they are often governed by volunteer boards of directors that represent the community as a whole.[54]

As already mentioned above, the settlement sector as a whole, and distinguished from the larger human service sector, possesses certain strategic capacities: to comprehensively assess client needs and assemble services to address those needs; to focus on families rather than individuals as the 'unit of analysis'; to channel services to neighborhoods and promote bridging between mainstream and newcomer communities and an ability to bring together services in times of crisis.[55]

The diversity of these agencies can enable them to read social reality with greater precision and contribute meaningfully to the generation, application and diffusion of knowledge. Their capacity to do so is a critical concern, for knowledge is the chief-propellent of the development of their organizations, their staff, their programs and services and, ultimately, of human well being. Knowledge is not synonymous with information. Assimilating information, while necessary and valuable, is different than understanding concepts, and making appropriate connections between them.

> It is possible for someone to have a fair amount of information about a particular issue, topic or area, but not to have much knowledge about or understanding of it. A settlement worker can be given more and more information about newcomers, about laws, regulations, programs, and resources in general, but this abundance of information does not necessarily help her serve her community in a more effective manner. It does not in itself spur innovation, better approaches and methods. By blurring the distinction between sharing and assimilating information and building understanding of concepts, one of the building blocks of knowledge, we can find ourselves working at a superficial level that does not result in effective action.[56]

Frontline workers and their immediate managers often describe the field of settlement as complex, rapidly changing with numerous multi-dimensional issues that are extremely challenging to address.[57] This, we argue, requires all, from the board of directors to frontline workers, including volunteers, to be in a learning mode and have the capacity to act in a learning mode. While such service providers are well placed to generate and apply knowledge in the context of providing services to newcomers, the settlement sector faces interrelated challenges that make this difficult.

A persistent challenge is that the sector does not really operate in a learning mode. The basis on which financial resources are allocated is generally not one of supporting capacity building, human resource development, and long-term lines of learning in action to address complex, multi-faceted questions and to determine what works in an emerging new reality. Too often resources are made available to support political, business or personal interests. Policy development is further influenced by the rise and fall of fads many of which are not grounded in sound theory. Operational pressures to achieve results – often

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[54] Canadian Council for Refugees, "Best Settlement Practices", (1998), p. 20.

[55] Meyer Burstein on behalf of Canadian Immigrant Settlement Sector Alliance, p. 1

[56] Iren Koltermann and Dan Scott, "Knowledge Generation and Transfer in the Toronto North Local Immigration Partnership", (2016), p. 18-19.

[57] Iren Koltermann and Dan Scott, p. 19.

narrowly defined, quantifiable and measurable – create demands that make it difficult to dedicate time to the necessary capacity building and to articulate, think and learn about difficult questions over time.

Regarding funding, "a great deal of literature points to the fact that a lack of longer-term and/or core funding for settlement agencies hampers organizational stability and capacity building in the sector, resulting in less innovation and ability to proactively address the evolving needs of immigrants (Baines et al. 2013; Joy and Shields 2013; Shields forthcoming; Türegün 2013b)."[58] For quite some time, the sector has identified the challenges associated with inadequate funding and short term funding that results in a lack of stability and staffing. Agencies often face a "complex patchwork of program-funding that must be sought from a range of different funders which requires considerable administrative focus, energy and time. Related to these points is the inherently unequal power relations between funders and settlement organizations."[59]

The challenges with funding – at the core of which has been a shift away from core, operational funding – impact critical aspects of the operation of settlement agencies, particularly organizational development and capacity building of staff:

> Richmond and Shields (2005) report that inadequate funding for community service agencies providing settlement services has led to gaps in services, instability and worsening conditions for staff working in the sector. A telling comment on the state of professional development in the settlement sector can be inferred from Citizenship and Immigration Canada's (CIC) 2012/2013 Contribution Agreement Negotiation Guidelines (CIC, 2012). As per the new guidelines, professional development and training related expenses are no longer eligible for reimbursement by CIC, the consequences of which are significant in the context of the rapidly changing demographics, increased workload and ability of workers in the sector to be responsive and build capacities to meet client needs.

> […]

> There has been a whole shift over the last 20 years away from core or operational funding to project funding… so what it means for individual workers is that you are never certain of your work, so there is no loyalty built ... what agencies are seeing is high turnover in staff… and it goes back to the question whether…one comes to the sector as a cause or a career, they are not staying very long in our sector… the concern that folks are having is that around succession planning... knowledge transfer does not happen, so you are constantly having to bring in new folks and train them and they go off and find more stable [jobs].[60]

Another challenge that appears repeatedly in the literature concerns accountability, which is often connected to funding requirements. The issue is well described by Shields, Türegün and Lowe:

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[58] John Shields, Adnan Turegun, Sophia Lowe, "Settlement and Integration Research Synthesis 2009-2013", (Toronto: 2014), p. 19-20.

[59] Canadian Council for Refugees, "Best settlement Practices", (1988), p. 21-23.

[60] Sita Jayaraman, p. 41-44. Concern with core funding stretches back quite some time. A 2005 study by Policy Solutions Consulting identifies the "shift from stable or "core" to time-delimited and restrictive contract funding for NGO service delivery, is intensifying the existing problems for service agencies sin matching limited resources to expanded demand."

This type of funding is accompanied by a rather heavy accountability reporting load which, in turn, prevents settlement organizations from "engaging in more community outreach and being more innovative in their approach" (Meinhard 2012; Shields 2013). Additionally, competition between settlement agencies for fewer settlement funds results in fewer genuine partnerships and capacity building efforts across the sector (Kilbride 2009; OCASI 2013). The various funding streams and their inconsistent distribution across the provinces have also resulted in inconsistencies in the kinds of settlement supports and services available by location, both within a province or territory and across the country (OCASI 2012; Türegün et al. 2012). Indeed, for some immigrants, there is a low awareness and uptake of settlement services (Lo et al. 2009).[61]

The unfortunate consequence of competition among agencies is important to highlight. Below is a complementary description of the issues:

Non-profits in the settlement service field find themselves in a constant struggle between their accountability to their newcomer clients to represent their interests and deliver quality services versus their accountability to government funders in the context where non-profits are in a never-ending quest to secure the next short-term funding grant their organization depends on for survival. In the world of multiple accountabilities that non-profit service providers operate in, these organizations are compelled to engage in a continuous balancing act. The granting of public funding usually involves cumbersome managerial and accountancy activities that pull valuable personnel, capital and time resources away from actual program delivery, which often negatively impacts the agency's service outcomes.[62]

One response to challenges with funding has led the sector to investigate other streams of funding, whether social enterprises or forms of direct business and services. It is unclear whether these approaches are well suited to meet the challenges, but these developments have implications for settlement workers.

The challenges described above create powerful constricting forces when it comes to the interrelated work of organizational capacity building and staff training and development, which lies at the heart of the discussion on competencies. Effective organizational capacity building and human resource development require resources and persistent attention, but also well-defined objects of learning. In the coming years these challenges will need to be overcome, and the intellectual capacity of the sector further enhanced. For now, these are factors that need to be considered when developing competencies for settlement workers.

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[61] John Shields, Adnan Türegünand Sophie Lowe, p. 19-20.

[62] John Shields, Julie Drolet, Karla Valenzuela, "Immigrant Settlement and Integration Services and the Role of Non-profit Providers; A Cross-national Perspective on Trends, Issues and Evidence", 2016, p. 16-19.

PART 2: COMPETENCIES IN THE SETTLEMENT SECTOR

Within the settlement sector, there has been longstanding concern with and ongoing discussion about human resource development. Some of these discussions have advanced into research projects and some have progressed to initiatives. Below is a brief mention of some issues related to the use of competencies within the sector followed by a description of the work that has been done to date to strengthen human resource development.

Considerations regarding the use of competencies in the settlement sector

Overall, there has been support within the sector for the articulation of best practices and the elaboration of foundational core competencies for settlement practitioner roles. However, considering the historical development of the sector and its current configuration, careful thought needs to be given to the elaboration and use of competencies. While a number of initiatives have been undertaken to strengthen human resource development and identify competencies, our preliminary research shows that they do not appear to be widely adopted and used within the sector. This point remains to be further investigated and researched during the second phase of this project. The concerns identified below are not necessarily unique to the settlement sector but are important to consider.

Competencies aim to strengthen core organizational processes and particularly human resource development. Developing and employing a competency framework in the settlement sector is challenging since the sector comprises of many small- to medium-sized resource-strapped organizations, who deliver services in a complex and evolving social reality, and carry out demanding human-service work, with externally established priorities and funding decisions. The passage below, from a 2003 report, expresses such concerns:

> The implications of establishing minimum core competencies for settlement counsellors need to be considered. Currently, a significant number of settlement agencies do not have annual salary increments for their staff, and it is unclear what proportion of agencies have professional development funds. If minimum standards are established, they may lead to expectations for a minimum salary level as well. In addition, resources might have to be allocated for skills upgrading or training in specific areas over an established timeframe.
>
> […]
>
> Settlement service providers and funders alike must understand precisely how and when standards will be used. Standards should not be established at the expense of agency creativity, flexibility, and responsiveness to community needs. Moreover, the comprehensiveness or degree of attainment of standards should be commensurate with the financial resources and longevity of a settlement agency. Additionally, consideration must be given to agencies in rural settings, where there may be limited community resources.[63]

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[63] Moy Wong Tam, p. 9.

Another challenge to strengthening human resource development relates to actual job responsibilities and positions in the sector, which – partly because of the sectoral factors discussed above and partly because of the nature of the frontline settlement work – tend to be wide ranging and diverse. They also vary widely among organizations. [64]

> As many jobs within the sector involve multiple roles within a job description, an individual's competency profile can be created by selecting common and role specific competencies requiring a high level of proficiency for the specific job. As the level of proficiency required for each competency within a specific job description will vary, it is not expected that staff be highly proficient in all competencies.[65]

As mentioned in part one, there is some ongoing tension in the sector concerning its increasing professionalization, "between those who see settlement as a cause and those who seek this sector as a career."[66] This issue requires a degree of sensitivity. The sector has historically drawn upon people with general qualifications, often from the populations and communities being served, some of whom now have decades of experience and have performed admirably. Part of the concern is not to create barriers that, while well intended, lose this diversity of experience and connection to the communities being served. This point is bound to concerns about competencies as they often encompass attitudes:

> Different cultural contexts that influence the understanding of competence and this is especially important in relation to the extent to which competence is defined by cultural literacy involving group identities such as race, gender, age and class (ascription), as opposed to demonstratable behavior (achievement). As Jeris and Johnson note, the distinction is confounded by the role of ascription in providing access to education and career opportunities that enable achievement: 'As much as the behavioral and skill-based performance assessments portend to be ''neutral and objective,'' the ascriptive elements remain present and troubling for today's increasingly diverse workplaces and is disturbing in light of the strong bonds between identifying competencies and tying them to practice standards. These standards, once developed, find their way into practice through certification of people and processes, through accrediting agencies (public and private) for all sorts of educational programs, and through qualification examinations and licensure requirements....The commodification of competence into certifiable competencies privileges the KSA (knowledge, skills and attitudes) worldview, and turns what Boon and van der Klink (2002) found to be a somewhat flexible concept into a rigid sorting mechanism that may have grave consequences for marginalized groups. (Jeris & Johnson 2004: 1108)[67]

Competence is not wholly centered in the individual nor exist in a vacuum, independent of the context of the work being performed. This will be probed further in the second phase of this project.

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[64] See Moy Wong Tam, p. 9.

[65] Ministry of Regional Economic and Skills Development British Columbia, "English Language Development and Settlement Service Worker Complete Competency Dictionary", 2011, p. 6.

[66] Sita Jayaraman, p 35-37. See also p. 55-57 for comments from informants.

[67] Francoise Delamare Le Deist and Jonathan Winterton, "What is Competence" in Human Resource Development International, volume 8, issue 1 (2005: Taylor & Francis), p 29.

Lastly, there is discussion about measurement in general, which affects thinking about competencies. What aspects of performance can be effectively measured in the provision of human services? What is helpful to measure? What might be unhelpful to measure? This discussion is influenced by reporting and monitoring requirements set by funding agencies and deserves some attention. Below is an example point from the discussion:

> Finally, organizations must specify what they expect to accomplish through the provision of services and devise measures to know whether and to what degree objectives have been accomplished. Additionally, performance measurement is not satisfied with output measures such as the number of clients served; client level outcome data is expected.
>
> Performance measurement in the human services is not easy. For example, in this sector service providers often speak of empowering clients. How do we define empowerment? How do we intend to facilitate client empowerment? How will we know when the client is empowered? How do we know for certain that it is the intervention of the settlement worker or a particular program that has led to the client's empowerment?[68]

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[68] Ontario Council of Agencies Serving Immigrants and COSTI, "The Development of Service and Sectoral Standards for the Immigrant Services Sector – Discussion Document", 1999, p. 20.

A review of initiatives to strengthen the capacity of settlement workers

In many respects, the settlement sector in Canada began to flourish in the 1970s and 1980s. Over the past several decades, the sector has generated a rich and significant body of research and discussion about organizational and individual standards, best practices and, more recently, competencies. As this project seeks to contribute to this discussion, below is a brief review of efforts made within the sector to date. It is based on a review of literature and our initial interviews with various umbrella organizations within the sector.

The work of settlement addresses areas of federal and provincial jurisdiction, and funding comes from both levels of government. There has been discussion about competencies at both federal and provincial levels, yet our initial research has found that there is not a high level of awareness of various initiatives across all provinces and territories. Systematic sharing of information and experience has been a persistent challenge of the sector.

Pan-Canadian initiatives

An important milestone in the discussion on best practices occurred in 1998 with the publication by the Canadian Council for Refugees of "Best Settlement Practices: Settlement Services for Refugees and Immigrants in Canada." The report, which followed broad consultations in the settlement sector, presented "some of the elements that are generally agreed to make for successful settlement programs."[69] Best practices were defined as being derived from successes, "those that have proven their worth and deserve to be emulated." It was recognized that best practices would evolve with time and experience and that they are to a certain extent contextual. The 12 best practices identified were articulated as guidelines, emanating from twelve core values:[70]

> Access
> Inclusion
> Client empowerment
> User-defined services
> Holistic approach
> Respect for the individual
> Cultural sensitivity
> Community development
> Collaboration
> Accountability
> Orientation toward positive change
> Reliability

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[69] Canadian Council for Refugees, "Best Settlement Practices", p.26-27.
[70] Canadian Council for Refugees, "Best Settlement Practices", p.28.

Below are the 12 best-practice guidelines:

1. Services are accessible to all who need them. Access is assured by:

   - providing a welcoming environment
   - offering services in the client's own language, where possible and appropriate
   - offering culturally appropriate services
   - undertaking outreach, so that services are known to those who might benefit
   - communicating effectively about the organization and its services
   - where possible, offering services irrespective of immigration status or other criteria of eligibility
   - providing an environment where women feel comfortable
   - offering childcare, where appropriate
   - having a geographically accessible site and/or addressing clients' need for transportation
   - having a physically accessible site
   - listening to and responding to concerns about accessibility

2. Services are offered in an inclusive manner, respectful of, and sensitive to, diversity. Inclusion is assured by:

   - recognizing the diversity of needs and experiences (e.g. young, old, highly educated, those without education, singles, families)
   - offering anti-racist services
   - providing a non-sexist environment
   - enforcing a policy of non-discrimination
   - offering non-judgmental services
   - respecting different perspectives within newcomer communities

3. Clients are empowered by services. Client empowerment is assured by:

   - fostering independence in clients
   - meaningful membership and participation of clients in the Board
   - encouraging client involvement in all areas of the organization
   - involving clients as volunteers
   - recognizing, affirming and building on the resources, experiences, skills and wisdom of newcomers
   - providing information and education to allow clients to make their own informed decisions
   - offering programs and services leading to employment and career advancement
   - offering a supportive environment (especially to those who are traumatized)
   - supporting the clients' right to choose from among service providers the approach that best meets their needs

4. Services respond to needs as defined by users. User-defined services are assured by:

- assessment of the needs and priorities of newcomer communities and the host society
- undertaking an individual assessment for each client of needs, expectations, goals and priorities
- assessment of the needs and priorities of newcomer communities and the host society
- involving newcomers in needs assessments
- ongoing assessment of whether services continue to meet needs
- listening to clients and communities served
- responding to the particular needs of refugees (recognition of differences, changing needs)
- offering flexibility in services
- incorporating flexibility into programs, in order to allow them to adapt to changing needs
- involving users in the planning, implementation and evaluation of services
- offering users maximum control over programs

5. Services take account of the complex, multifaceted, interrelated dimensions of settlement and integration. A holistic approach is assured by:

- recognizing the diversity of an individual's needs (physical, social, psychological, political, spiritual)
- responding wherever possible to a variety of needs at once
- providing a range of services in one location ("one-stop")
- recognizing that integration is a long-term process
- avoiding compartmentalization
- taking into account the effects of policy decisions on individuals and communities and responding through advocacy
- recognizing the importance of the family in the lives of individuals
- providing opportunities for relaxation and fun

6. Services are delivered in a manner that fully respects the rights and dignity of the individual. Respect for the individual is assured by:

- confidentiality
- services free of racism, sexism and other forms of discrimination
- respecting the fundamental rights of each participant
- compliance with a Code of Ethics
- offering a professional quality of services
- recognizing the uniqueness of each person
- giving full and accurate information
- making human contact
- good monitoring, selection and training of volunteers

7. Services are delivered in a manner that is culturally sensitive. Culturally sensitive services are assured by:

- having staff and volunteers from the same background as the clients served
- ensuring that service providers are knowledgeable about the culture of those being served
- offering services in a culturally appropriate manner
- developing and implementing policies on cultural competency and anti-racism
- showing respect for different cultures

8. Services promote the development of newcomer communities and newcomer participation in the wider community and develop communities that are welcoming of newcomers. Community development is assured by:

- giving priority to community building
- investing in the development of newcomer communities
- developing community leadership
- building bridges between communities
- eliminating barriers to newcomer participation in the community
- familiarity with the resources in the local community
- working towards changes in public attitude towards newcomers
- working through the organizations of newcomer communities
- involving volunteers in services delivered

9. Services are delivered in a spirit of collaboration. Collaboration is assured by:

- promoting partnerships between organizations that build on strengths of each
- good working relationships
- team-building
- communicating regularly with others and sharing information
- referral services
- coalition-building
- providing opportunities for community problem-solving
- taking account of available resources and experiences

10. Service delivery is made accountable to the communities served. Accountability is assured by:

- the organization's Board
- evaluation, involving the participants
- ongoing monitoring
- performance appraisals
- policy and procedure manuals (for financial management, administration and personnel)
- fiscal responsibility
- development of goals and specific measurable, realistic outcomes

11. Services are oriented towards promoting positive change in the lives of newcomer and in the capacity of society to offer equality of opportunity for all. An orientation towards positive change is assured by:

- advocating for improvements in policy
- recognizing and building on the possibility of change in the lives of newcomers and in society
- developing new programs and new service models
- improving services through training and research
- celebrating successes

12. Services are based on reliable, up-to-date information. Reliability is assured by:

- keeping information up-to-date
- using social research
- exchanging information

The guidelines seem written with whole organizations in mind, rather than being focussed on individual workers or teams. Nevertheless, together with the 12 values, they provide insight into the qualities and attitudes of frontline workers and give a sense of the work they perform, "assessing", "evaluating", "advocating", "fostering", "encouraging", "offering."

In 2000, the Canadian Council of Refugees published a framework document for standards for settlement services, building on the 1998 efforts. It re-affirmed the values and best practice guidelines outlined in the 1998 document and went further to provide some indicators. It also described the services that each immigrant and refugee is entitled to receive depending on their need and then provided an outline of the qualities that immigrants and refugees are entitled to find in the organizations and workers within the settlement sector.[71]

Beyond qualities, attitudes and ethics, the framework gives helpful insight into the substantial body of knowledge a settlement worker needs to possess, including "essential theories, concepts and principles" related to settlement and migration; theories of personal and social change and cultural; Canadian social organization, multiculturalism, and human rights; relevant systems, services, programs, and laws in the field of immigration, health and education. It also identified necessary abilities and skills including: to think critically and analyze information effectively, to communicate well, to advocate, to creatively problem solve, to interview and assess, to listen, to work collaboratively, to outreach, to build and maintain relationships, to recognize one's own bias, and to deal with sensitive issues.

A discussion paper titled "Service and Standards Framework" prepared for the National Settlement Conference in 2003 reflected the advances in the conversation. The values and guiding principles discussed in the 1998 and 2000 papers were condensed into 6 "values and guiding principles of the settlement sector."

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[71] To avoid providing further long quotations in the body of this report, the relevant sections of key documents are provided in Appendices; those from the 2000 framework document are presented in Appendix A.

1. Client-centred: In the design and provision of services, the unique background of individual clients—including ethnicity, sex, language, migration experience, and specific needs are taken into consideration, within the mandate and resources of the agency.

2. Empowering: Services foster the independence of clients in the new environment by facilitating and supporting their learning and decision-making through provision of information, and by recognizing and mobilizing their internal resources, experiences and skills.

3. Holistic: Services are provided in a manner that simultaneously recognizes the multidimensionality of client needs; physical, social, psychological, spiritual, political and other and aspirations to avoid compartmentalization of those needs. In addition, services include community development and promoting positive changes at the societal level to create a more welcoming environment for clients.

4. Accessible: Culturally appropriate services are available in a safe environment to all individuals who meet the service provider's eligibility criteria and are provided in the client's language where necessary and feasible; service locations are accessible geographically, and wheelchair-accessible whenever possible.

5. Equitable and Respectful: Services are provided in a manner that respects the rights and dignity of clients, and without any form of discrimination based on a client's background.

6. Accountable: Information is gathered on an ongoing basis so that it is accurate and current; programs and services are monitored and evaluated regularly to improve effectiveness and efficiency; accountability is also ensured by having an appropriate and transparent governance body and practices, appropriate infrastructure, responsible management, and openness to scrutiny by membership and funders.

The paper then went on to define the "minimum core competencies for a settlement counsellor" alongside an evaluation framework and a code of ethics. A full excerpt can be found in Appendix B.

After 2003, the discussion moved largely to the provincial level.

Provincial initiatives

Ontario

In 1999, the Ontario Council of Agencies Serving Immigrants in collaboration with COSTI conducted a project around standards for the settlement sector. The resulting discussion document identified 6 "intrinsic values" for the sector:

Social justice, equality and equity
We believe that every immigrant and refugee is entitled to equal access and opportunities to fully participate in the social, economic, political and cultural life of society. We trust that the anti-racist approach of the sector and the spirit of equality established by the Canadian Charter of Rights and Freedoms as public policy can strengthen our resolve to eliminate barriers to equity which face immigrants and refugees.

Accountability
As publicly funded organizations we are committed to using our funds as efficiently and effectively as possible, and to being open to clients and public scrutiny.

Excellence
The programs, services, management and governance of the sector endeavour to achieve the highest possible standards to meet the needs and expectations of the immigrant and refugee communities.

Diversity
We respect differences among people and believe that every immigrant, and refugee offers unique and irreplaceable contributions to our society.

Partnership and collaboration
We believe in partnership and cooperative working relationships with other community organizations and groups with similar interest and shared values that build on the strengths of each other.

Innovation and creativity
We encourage innovative ideas and creative approaches that are responsive to the changing needs and expectations of the community and the overall environment which consider new resources such as access to technology.

The document then went on to present a summary of "core services and accompanying standards," identifying key areas as" "Initial intake/assessment", "Orientation to Canadian society", "Employment counselling", "Social support services", "Individual and family support services", "Advocacy", "Agency general practice standards", and "Case coordination standards". While written in general terms and without indicators the descriptions are helpful in giving insight into the aims of settlement workers. See Appendix C for a high-level description related to settlement workers.

Manitoba

In 2008, the Manitoba Department of Labour and Immigration developed a guide for immigrant settlement services. It defined settlement services as "Best practices are the ways and means that have proven their worth and deserve to be emulated as an ideal to which an organization or community can strive. They are a current understanding. They are not 'carved in stone,' but require updating as methods and practices are honed through the experience of your community as well as other communities and organizations involved in immigration."[72] The guide then provided the 12 best practices developed in 1998 by the Canadian Council of Refugees.

British Columbia

In 1998, the Multilateral Task Force on Training, Career Pathing and Labour Mobility in the Community Social Service Sector in British Columbia developed a competency framework for the settlement sector. Ten years later, the framework served as the stimulus for the development of "Occupational Competencies Framework for Staff Providing Services to Immigrant and Multicultural Populations."[73] This framework was developed with the assistance of more than 20 workers and managers representing many different types of immigrant-serving organizations in British Columbia. In 2009, the framework became the basis for the 30 common competencies for settlement workers in the province and that year a separate project was launched to determine role specific competencies relevant to the seven main worker roles within the English Language Development and Settlement Program: "Management of Immigrant Services, Administration support of Immigrant Services; Language Instruction; Settlement Support; Childcare Provision; Volunteer Coordination; Job Search and Career Planning."[74] The results of all this work were published in 2011 by the British Columbia Immigrant Integration and Multiculturalism Branch of the ministry of Regional Economic and Skills Development and was titled as the English Language Development and Settlement Service Worker Complete Competency Dictionary.

The 30 common competencies that pertain to all settlement workers within the English Language Development and Settlement Programs are presented in Appendix D. The 30 common and the "select role specific competencies" help give insights into the roles and functions of frontline workers and help make a significant advance in the understanding of the roles and functions of frontline settlement staff.

Alberta

In 2000, the Alberta Association of Immigrant Serving Agencies (AAISA) developed an Occupational Competencies Framework. In 2010 a revised framework was published to incorporate feedback from settlement agencies and to reflect changes in the sector over the previous ten years. The 2010 framework drew on the Occupational Competencies Framework developed in British Columbia in 2008. The Framework aims to:

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[72] Manitoba Department of Labour and Immigration, "Developing Immigrant Settlement Services: A Guide for Communities", (2008), p. 13.

[73] British Columbia Immigrant Integration and Multiculturalism Branch of the Ministry of Regional Economic and Skills Development, "English Language Development and Settlement Service Worker Complete Competency Dictionary", (2011), p. 5.

[74] Ibid., p. 6.

- Describe the range of services and supports immigrants may need on their various paths to integration into Canadian society
- Provide a useful description of the work carried out by many different types of practitioners to meet the needs of immigrants
- Represent the "best practices" in the sector
- Describe the competencies required to fulfill the AAISA Mission Statement and to meet AAISA Objectives
- Provide the basis for training opportunities through which new and experienced settlement practitioners can enhance their abilities to provide leadership to support the settlement of immigrants in Alberta
- Provides the basis for AAISA accreditation

The Framework does not describe any one person's job or job description; rather it describes what needs to happen in the settlement, adaptation and integration process. Nor does the Framework describe in detail the specialized knowledge, skills and abilities required of specialists such as employment counsellors, managers, psychologists etc. It sets out the Roles, Functions, Activities and Indicators of Good Practice which reflect the scope of practice all practitioners in the sector need to assume in order to achieve the broad objectives of the Canadian "commitment to deliver ...the highest quality immigration, citizenship, and multiculturalism programs that are efficient and responsive to community needs...and to help newcomers and citizens participate to their full potential in fostering an integrated society."[75]

An overview of the competency dictionary is provided in Appendix F. The framework elaborates related theories, concepts and principles that settlement workers should know, related skills they should possess and facts, data and information of which they should be aware. It also goes into detail about the activities and indicators of good practice for each.

We understand that Alberta is finalizing a revised version of the framework, but it is not yet publicly available.

Quebec

Quebec has a well-established umbrella organization, "Table de concertation des organismes au service des personnes réfugiées et immigrantes," (TCIR) with 100-member organizations across the province. TCIR offers training to its members on a wide-range of subjects at both the managerial and frontline levels. Its training is provided within a defined framework. It aims to impart "three kinds of knowledge": "le savoir", theoretical and technical knowledge; "le savoir-faire", know-how or knowing how to do; and "le savoir-etre", knowing how to be. TCIR has gone further to identify certain categories of frontline workers that have emerged over the past decades, for example, "Cadre référence des intervenants communautaires scolaires interculturels". For these categories, they have developed basic competency profiles.

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[75] Alberta Association of Immigrant Serving Agencies, "Framework of Occupational Competencies for Settlement Practitioners 2010, (2010)

Atlantic provinces and Saskatchewan

Our review of literature did not find any substantial documentation of initiatives in these provinces. We have contacted several organizations in these regions but have not learned of any specific initiatives. We will update this report should further information come to light.

CONCLUDING REMARKS

This report had a two-fold aim: to consider the nature of frontline settlement work with a view to identifying factors that may impact human resource development; and to become more familiar with the literature related to capacity building and competencies within the sector. It was undertaken in support of a project aimed at contributing to efforts seeking to enhance the capacity of frontline settlement practitioners, particularly the functional role of settlement counsellors.

The settlement sector in Canada, which developed largely in parallel to what can be termed "mainstream" human services, provides a vital service to hundreds of thousands of newcomers each year and by doing so contributes to Canadian society as a whole. The wide range of diverse settlement organizations – many of them small to medium size – that lie at the core of the sector need to address a wide range of needs and circumstances in complex and ever evolving political, social and economic conditions. World events and government policy shape both the profile of immigrants who arrive in a given period and the social environment of host communities who receive them. The diversity of these organizations, reflecting the diversity of the people who arrive in Canada, is a significant strength endowing the sector with strategic capabilities: to assess and respond appropriately to the needs of diverse newcomers, not only at the level of the individual but of families; to effectively channel services to neighborhoods and promote unity among mainstream and newcomer communities; and to bring together services in times of crisis. Yet, they labour in a sector that struggles to operate in a learning mode, where long-term objectives give rise to development plans.

The capacity of each organization to act effectively ultimately depends on its staff and its ability to provide for their ongoing training. Settlement organizations draw on diverse staff to reach the newcomers they seek to serve and their communities. Most also engage a sizeable proportion of volunteers who need some training and support as they act. There has been an ongoing, meaningful conversation in the sector about human resource development and capacity building stretching back to at least two decades. It is a conversation that has unfolded at both the national and provincial levels and has been sensitive to the inherent opportunities, challenges and difficulties within the sector. The first research and discussions led to the articulation of best practices and standards, for the sector, for settlement organizations and for staff. These practices and standards were refined and built upon by provincial umbrella organizations that have in some cases begun to elaborate generic, role-based competencies of organizations and practitioners. These provincial umbrella organizations are also working to develop and offer basic training content, using both in-person and online modalities. All these are promising developments.

There is a high degree of coherence among national and provincial organizations on statements of values, principles and standards. The competency frameworks that have been made available by the Ministry of Regional Economic and Skills Development in British Columbia and the Alberta Association of Immigrant Serving Agencies are well grounded in these values and principles. These competency frameworks are well thought out, but general in nature and primarily concerned with enabling workers to understand their roles and indicators of good practice. They are both detailed, and both have many competencies or competency statements. How widely these are drawn upon by individual organizations and how specifically they are used is a question of interest.

A large number of settlement organizations are small to medium-sized in terms of their scope of operations and overall staff size. They generally do not have human resource departments or even dedicated personnel to attend to this function; and if they do, they are often quite busy. It is difficult for many of these organizations to work through a competency framework and develop and deploy effective training and monitoring. These organizations may benefit from drawing on the support of larger organizations or umbrella associations that can provide training based on sound competencies. It is unclear, however, if such an approach will be enough on its own – given the variation in organizational arrangements, job definitions, and staff/volunteer turnover – but it could lend assistance. There may, however, be some key competencies that can help managers work with employees to raise the capacity of frontline workers to respond to ongoing and evolving demands. This will be explored in the second part of this project.

One final note: Building capacity in staff requires more than a set of competencies, even when this includes training content. It also involves enhancing organizational capacity, especially the capacity to learn from experience. This, in turn, requires the organization to work within a clear conceptual framework. These and other considerations will need to be taken into account when searching for and developing key competencies to assist managers and their staff.

APPENDICIES

The 5 appendices of this report provide extended excerpts from key initiatives to strength practices, standards and competencies in the settlement sector in Canada. We are providing extended excerpts here for ease of reference and to minimize long quotations in the body of the text. We have made effort to preserve basic formatting of the original documents but acknowledge that some changes have been made.

APPENDIX A

Excerpts from the Canadian National Settlement Service Standards Framework.

CLIENT SERVICES

This section identifies the settlement services to which each immigrant and refugee is entitled, depending on need. The list of services is presented from the client's perspective: it is not necessary that every agency offer all services. The objective is that there be a continuum of services delivered by competent practice. Nor will each service area necessarily be addressed in a separate meeting: depending on the needs of the client, one meeting might quickly cover several areas.

It is important to underline that immigrants and refugees are provided with large amounts of information in the settlement process. Often this information is not digestible all at once. It is therefore necessary to build into the process opportunities for clients to review information they may already have received.

Each immigrant and refugee has the right to:

A.   **PRE-ARRIVAL/PORT OF ENTRY INFORMATION**
– pre-arrival and/or at port of entry, generic information about Canada as well as notice of the availability of more detailed local information, and of the availability of support services, including settlement services.

B.   **INITIAL INTAKE/WELCOME**

i)   Orientation to the service
– explanation of agency policies, procedures and services (as applicable to client)
– explanation of client's rights and responsibilities (e.g. right to see file, responsibility to be actively involved in the service).
– explanation of practitioner/agency role and limitations
– assurance of confidentiality (explaining that information is confidential except with their consent, or according to legislation)

ii)   Assessment of immediate needs
– food
– shelter
– clothing
– physical and mental health
– safety
– language (need for interpretation, translation)
– income security
– immigration status (for refugee claimant etc this may be a serious and immediate need)

C.   **ASSESSMENT/INFORMATION/REFERRAL AND FOLLOW UP**

i)   Identification of other needs

– documentation (e.g. picture ID, SIN, health care)
– employment (e.g. finding a job, upgrading, accreditation)
– language (e.g. acquisition, upgrading, specialized training)
– physical and mental health
– immigration (e.g. status, family reunification)
– education (children, youth and adults)
– family issues (e.g. child care, seniors, parenting)
– housing (place to live, adequacy, landlord-tenant issues, purchasing)
– income (e.g. income security, child tax benefit)
– transportation (e.g. access to public transport, driver's licence)
– social connectedness (e.g. community involvement, ethnocultural groups, faith communities)
– legal (e.g. child protection, criminal justice, domestic violence)
– life skills (e.g. cooking, parenting)

ii)   Prioritization of needs

iii)   Development of short-term and long-term plans and implementation strategies

iv)   Information and referral

Follow up and re-assessment of needs (e.g. that referral happened, had the results desired, if not re-assessment)

Evaluation (service impacts)

D.   ORIENTATION
(Orientation may be delivered individually or in groups)

i)   Practical
– transportation
– emergency services
– community and government services
– housing and utilities
– health (promotion, services, nutrition)
– legal issues (services, Canadian laws)
– education
– language resources
– finance (including banking, budgeting, tax returns, credit)
– employment
– consumer awareness (e.g. credit cards, contracts)
– climate

ii)   Cultural and social orientation

– civil rights and responsibilities (e.g. human rights legislation, diversity)
– community life skills
– managing change (e.g. Canadian cultural norms, culture shock, immigration experience, role reversals in the home, intergenerational conflicts)
– voluntarism
– addressing issues of racism

E.   **FACILITATING ACCESS TO APPROPRIATE SERVICES**

– includes advocacy for clients, accompaniment, interpretation/translation, form-filling, support in immigration and other processing, sensitization of mainstream services, family support services, mediation.

F.   **VOLUNTEER/PEER SUPPORT SERVICES**
– includes Host, programme de jumelage, tutoring, conversation circles, community kitchens.

G.   **SUPPORTIVE COUNSELLING**
– includes active listening, reassurance, talking through experiences.

H.   **SPECIALIZED SERVICES FOR SURVIVORS OF TORTURE AND TRAUMA**
– settlement services delivered in a manner sensitive to the special needs of survivors of torture and trauma.

I.   **LANGUAGE TRAINING**
– includes literacy, language acquisition and upgrading, employment-related language

J.   **EMPLOYMENT COUNSELLING AND TRAINING**
– includes employment counselling, labour market orientation, job search skills training, job maintenance.

K.   **COMMUNITY CAPACITY BUILDING**
– includes support for new communities developing networks and organizations, leadership skills, facilitating dialogue with government and institutions, facilitating group activities

SETTLEMENT SECTOR WORKERS

This section outlines the qualities that each immigrant and refugee is entitled to find in workers within the settlement sector. Parts A and B, *Values* and *Professional Ethics*, apply to all who

work in a settlement agency, including for example receptionists. Parts C, D and E are more specifically geared to the qualities required in a settlement worker.

In addition to the skills and knowledge set out below, workers in specialized areas, such as language training or employment counselling, will of course need additional competencies.

It must be recognized that the ability to hire and retain highly competent workers depends to a significant degree on the conditions of employment that can be offered. Many settlement agencies experience a high turnover rate, because of low salaries and benefits and limited opportunities for advancement.

A) VALUES

Workers will be committed to the core values outlined above (pages 12 - 15):

– Access
– Inclusion
– Client empowerment
– User-defined services
– Holistic approach
– Respect for the individual
– Cultural sensitivity
– Community development
– Collaboration
– Accountability
– Orientation towards positive change– Reliability

This includes an expectation that the worker demonstrate commitment to the elimination of discrimination, including racism, sexism and homophobia.

B) PROFESSIONAL ETHICS

Each worker will adhere to standards of professional ethics, including:

– Respect for client confidentiality
– Maintenance of professional relationships (healthy boundaries)
– Prevention and avoidance of conflicts of interest
– Understanding one's role and limitations

C) KNOWLEDGE

Each settlement worker will:

– Understand the essential theories, concepts, and principles relating to:

    – settlement, including current theories of the effects and adjustments after migration, processes and stages of individual adjustment to migration, theories of personal and social change, the theories that influence settlement, the impacts of major life changes, the effects of migration on family and economic life;
    – the refugee experience
    – culture and cultural change
    – Canadian social organization
    – multiculturalism, human rights and racism
    – cross-cultural competency
    – professional ethics.
    – Be familiar with the social, cultural, economic, political and spiritual background of the client.
    – Be aware of global and Canadian events that impact migration and settlement.
    – Know about relevant systems (services, programs, laws in fields of immigration, health, education, etc.)

D) SKILLS

The settlement worker will have the ability to:

    – think critically and analyze information effectively
    – communicate in a language suitable to the context, including in writing (e.g. skills in cross-cultural communication, ability to speak to client in a way/in a language that can be understood, ability to communicate with government officials appropriately) – develop and sustain professional practice
    – advocate
    – creatively problem solve
    – respond to issues and plan
    – interview and assess
    – listen actively
    – find information and keep information updated
    – work collaboratively
    – outreach in the community and network
    – make presentations
    – build and maintain effective relationships
    – recognize own bias
    – recognize how client's dimensions of personal identity may impact client development, choices, and ways of seeking assistance
    – deal with sensitive issues effectively
    – use self-disclosure appropriately
    – conduct multiple tasks simultaneously
    – maintain case files
    – manage time
    – set priorities

E) PERSONAL SUITABILITY

- **Commitment to lifelong learning**
- Flexibility
- Sensitivity (includes cross-cultural sensitivity, sensitivity to one's impact on the client, sensitivity to issues of racism/sexism/homophobia, ability to understand what the person is asking for)
- Self-awareness and self-criticism
- Client-centred approach

SETTLEMENT ORGANIZATIONS

This section identifies the qualities we believe immigrants and refugees are entitled to expect in the organizations that deliver settlement services. The effectiveness of the settlement services depends not only on the individual workers who deliver them, but also on the organization within which they are delivered. The organization is responsible for creating a welcoming environment and running programs that are responsive, effective and accountable.

The ability of settlement agencies to meet expectations in the areas outlined below is dependent on the availability of means. Many settlement agencies in fact struggle with inadequate financial support.

Organizational standards relate to the basic infrastructure and systems that organizations should adhere to in order to be able to provide and sustain core immigrant and refugee services in an accountable manner.

A. **VALUES**
   Every organization will be committed to the following values outlined above

- Access
- Inclusion
- Client empowerment
- User-defined services
- Holistic approach
- Respect for the individual
- Cultural sensitivity
- Community development
- Collaboration
- Accountability
- Orientation towards positive change
- Reliability

This includes a commitment to the following program approaches:

- Client confidentiality
- Case coordination
- Promotion of independence of clients
- Diversity in service delivery and methods

– Culturally/linguistically appropriate approaches
– Community needs assessment
– Evaluation of programs and services
– Partnerships and networking
– Creating a welcoming environment for all

B. GOVERNANCE
Every organization will have:

– Mission statement (purpose)
– A commitment to a community-based philosophy founded on participatory and democratic principles
– Community-based board of directors that reflect the community and client population– Bylaws
– Board policies (nominations, board member recruitment, elections, conflict of interests, board expenses, board development)

C. OPERATIONAL POLICIES AND PROCEDURES
Every organization will have:

– Financial policies which ensure transparency (checks and balances)
– Organizational chart
– Personnel policies (conditions of work, performance appraisal, staff development, remuneration, recruitment, job descriptions)
– Anti-racism and other equity policies
– Health and safety - workplace environment, employment standards
– Insurance (including liability)
– Clear complaints procedures

Ideally organizations will also have:

– Accessible offices (in terms of location and plant)
– Communications strategy (including ways of obtaining input from clients)
– Service procedures
– Voluntary policy
– Equipment use policies (e.g. computer use policy)
– Fundraising policy
– Organizational code of conduct
– Anti-harassment policy
– Quality assurance policy (policy review process)
– Strategic plan process

D. COMMUNITY ROLE
Every organization will:

– promote social justice and equity
– respond to social change and immediate issues
– support sectoral coalitions/umbrella groups
– build welcoming communities

APPENDIX B

Excerpts from the "National Settlement Service and Standards Framework: Discussion paper developed for National Settlement Conference II"

Settlement Practitioners Core Competencies

The settlement sector has generally agreed that it would be beneficial for all settlement practitioners to share a set of foundational core competencies. This discussion document defines settlement practitioner broadly, to include settlement counsellors, program managers, Host program coordinators, employment counsellors, and other positions listed and categorized in Appendix C. There are specific competencies related to each position. As was mentioned in Section 1, further discussion is needed to determine whether these core competencies should apply to language instructors.

Minimum Core Competencies for a Settlement Counsellor

The implications of establishing minimum core competencies for settlement counsellors need to be considered. Currently, a significant number of settlement agencies do not have annual salary increments for their staff, and it is unclear what proportion of agencies have professional development funds. If minimum standards are established, they may lead to expectations for a minimum salary levels as well. In addition, resources might have to be allocated for skills upgrading or training in specific areas over an established timeframe.

Some work has been done in defining foundational knowledge or core competencies required for settlement practitioners in general. Holmes and Kingwell (2002) have outlined the minimum skills and personal qualities that practitioners must add to their foundational knowledge:

Settlement Counsellor

1. Knowledge
   - Knowledge of Canadian social systems: immigration, health, legal, education, financial, social organization, housing, and employment; and familiarity with essential concepts of human rights and anti-racism;
   - *Specialized knowledge:* ability to apply knowledge of the refugee/immigrant experience, of the impact of migration and its socio-political reality, and of the resettlement and cultural adjustment process; ability to research relevant community resources.

2. Skills
   - *Professional:* ability to comply with work code of ethics, maintain healthy boundaries and confidentiality, manage and prioritize tasks and time, identify and solve ethical dilemmas, evaluate services to clients, inform clients of reporting obligations and report as required by law, and engage in ongoing professional development;

   - *Communication skills in cross-cultural settings:* ability to communicate in a culturally sensitive way and in client's language where necessary; use language appropriate to the

situation; understand and use appropriate body language and good listening skills; check perceptions and accuracy of information; read, write, and speak in operating languages; seek clarification where necessary; and make presentations and facilitate workshops;

- *Cross-cultural sensitivity:* ability to interpret cultural differences and use cross-cultural approach in service delivery;
- *Helping skills:* ability to establish rapport with clients and create a safe environment based on trust;
- *Counselling skills:* ability to understand client experience, assess and prioritize needs with clients, contract and offer supportive counselling;
- *Critical thinking and analysis skills:* ability to understand complex legislation and policies, select information for orientation, and assess community resources and options with clients;
- *Translation and interpretation skills;*
- *Advocacy, problem-solving and mediation skills:* ability to help clients present claims and seek fair treatment, to negotiate between clients and other parties, and to facilitate understanding and agreement;
- *Networking skills:* ability to help clients connect with faith and ethnic groups, to organize leisure and social activities for clients, to recruit host families and volunteers and match clients with hosts, to link and consult with community and other agencies, and to make appropriate referrals;
- *Office skills:* ability to apply computer skills, when necessary in information research, record services and updating case notes and files, e-mail, as well as skill in the operation of office equipment and systems; and
- *Collaborative skills:* willingness to work as a team member, consulting and sharing information with colleagues.

3. Personal Attitude and Qualities

- Awareness of own biases and limitations;
- Flexibility;
- Cultural sensitivity and respect for clients from diverse backgrounds; and acceptance of professional ethics and agency mission.

Code of Ethics

1. A settlement practitioner's primary responsibility is to the client, and the practitioner must therefore avoid or declare any conflict of interest.

2. A settlement practitioner shall respect the privacy of clients and hold in confidence all information obtained in the course of service provision, unless explicitly and appropriately authorized to do otherwise.

3. A settlement practitioner shall make every effort to foster maximum self-determination on the part of the client.

4. A settlement practitioner shall not exploit the relationship with a client for personal benefit, gain, or gratification.

5. A settlement practitioner shall carry out their professional duties and obligations with integrity and objectivity.

6. A settlement practitioner shall maintain competence and promote excellence in the provision of settlement services to a client.

7. A settlement practitioner shall advocate change in the best interest of the client and for the overall benefit of society.

8. A settlement practitioner shall model and promote an inclusive society that is free of racism and all forms of discrimination.

9. A settlement practitioner shall uphold the vision, goal and objectives of the employing organization.

Outcomes Evaluation Framework

ACTIVITIES *See activities in logic model*	IMMEDIATE OUTCOMES *First benefits or changes in knowledge or ability*	INDICATORS *Observable and measurable characteristic or change that signals that an outcome has been achieved*	DATA SOURCE	DATA COLLECTION METHOD
1	Clients are aware of barriers and options	number and percentage of clients who report that they have learned of a situation (e.g. employment/ labour market situation) that might affect their settlement and know of options that are open to them	Clients	Client survey
2	Clients know Canadian norms and culture Clients know about general services and systems	☒ number and percentage of clients who demonstrate knowledge of what is ordinary and socially acceptable in Canadian society ☒ number and percentage of clients who demonstrate knowledge of their legal rights and entitlements or responsibilities ☒ number and percentage of clients who demonstrate knowledge of major cultural events and holidays celebrated by the mainstream community ☒ number and percentage of clients who demonstrate knowledge of basic services or systems in the general community	Clients	Client survey and test
3	Clients know immigration, settlement or adjustment processes	number and percentage of clients who report that they now know the steps required to meet specific needs, such as status, family reunification, and benefits	Clients	Client survey
4	Clients know about appropriate services and resources that meet their specific needs	number and percentage of clients who report that they know how to contact a government or commun ity service relevant to their need	Clients	Client survey

5	Clients can communicate their needs to appropriate services or resources	number and percentage of clients who report that the support they receive has improved their communication with a mainstream agency	Clients	Client survey
6	The general service community is more aware of immigrants' needs	number of mainstream organizations and businesses (contacted through service bridging activity) that report a better understanding of immigrant needs	Mainstream agencies	Interview with mainstream agencies
7	The settlement agency has the necessary knowledge base and resources to deal with changing needs	number and percentage of settlement practitioners who report that they have sufficient resources, training and support to do their job	Settlement staff	Staff survey

MEDIUM -TERM OUTCOMES *Changes in attitude and behaviour that result from new knowledge or ability*	INDICATORS *Observable and measurable characteristic or changes that signal that an outcome has been achieved*	DATA SOURCE	DATA COLLECTION METHOD
Clients develop realistic goals and plans	number and percentage of clients who report that they have identified or redefined their employment plans or personal goals based on an increased awareness of barriers or options	Clients	Client survey
Clients adjust to Canadian life and culture and deal with issues that result from resettlement and adjustment	☒ number and percentage of clients who report a change in lifestyle, attitude or practice that reflect Canadian norms culture such as parenting, gender roles, social recreational activities, banking and budgeting	Clients	Client survey or focus group
	☒ number and percentage of clients who report that they have used appropriate services to deal with legal, interpersonal or family issues that result from resettlement or adjustment	Clients Settlement staff	Client survey Service record
Clients meet personal and family needs and pursue improvements	☒ number and percentage of clients who report that they have used mainstream services and systems to meet settlement needs such as shelter, status, documentation, employment and educational counselling, day care, or to obtain basic entitlements such as social benefits and health care	Clients Settlement staff	Client survey Service record
Clients interact with mainstream society	☒ number and percentage of clients who report that they have used a service or program to improve their situation or quality of life or to attain personal goals such as recognition of credentials, or enrollment in educational or training programs	Clients Settlement staff	Client survey Service record
	☒ number and percentage of clients who report that they participate or volunteer in community or school activities or networks	Clients Settlement staff	Client survey Staff observations

The general service community adapts to newcomer needs	number and percentage of mainstream organizations and businesses (contacted through service bridging activity) that adapt a product, service process or programming, policy or practice to take account of immigrant needs	Settlement agency or Mainstream age ncies	Settlement agency service record or Interview with mainstream agencies
The settlement agency improves and enhances its services to meet changing needs and environment	Agency reports that they have aligned their service activities and approach with changing needs and environment	Settlement agency	Agency report

APPENDIX C

Excerpts from "The Development of Service and Sectoral Standards for the Immigrant Services Sector – Discussion Document."

1. Initial intake/assessment

Rationale/assumptions: Ensuring that the basic needs of clients and their families are met is the first tasks of settlement work

Definition: Intake/assessment is a crucial component of holistic settlement service delivery. No matter what the client's reporting problem, this preliminary assessment should inquire needs related to shelter, food, employment and income security, physical and mental health (assessment and appropriate referral), immigration status, and children's wellbeing, and access to childcare/education.

Principle: The well being of the entire family assessed in the language of the client, by knowledgeable workers who: a) speak the language of the client; or b) are working with a trained community interpreter.

2. Orientation to Canadian society

Rationale/assumptions: An introduction to the new society will reduce the experience of dislocation experienced by newcomers.

Definition: These services are primarily educational in nature and are intended to provide newcomers with an overview of how the host society operates in a number of key areas relevant to everyday life.

Principle: These services should be provided as soon as possible after arrival, in the language of the client, by knowledgeable workers who: a) speak the language of the client; or b) are working with a trained community interpreter.

3. Employment counselling

Rationale/assumptions: Suitable employment is key to income security, feelings of self worth, and successful integration. The provision of employment services is therefore crucial.

Definition: The employment services described below are general (e.g., orientation) rather than specialized (e.g, employment training) and should be provided by knowledgeable staff to newcomers as early as possible in the process of settlement counselling

Principle: Clients should be provided with assistance in either a) securing jobs equivalent to their skills, knowledge, and experience; or b) using their skills to generate income

4. Social support services

Rationale/assumptions: Isolation and loss or lack of supportive relationships is a risk factor in the resettlement process.

Definition: These services are intended to assist newcomers to develop personal and community relationships and resources that may reduce isolation and provide needed help and social support.

Principle: Isolation of all members of the family unit should be investigated.

5. Individual and family support services

Rationale/assumptions: Immigrant clients are primarily healthy individuals who are experiencing the stresses of resettlement--namely the challenge of adjusting to a new culture and society. Enhancing newcomers' feelings of strength and competence in dealing with the transition to a new society will help to reduce the stress of relocation.

Definition: These services are educational and preventive in nature. Understanding the effects of migration on individuals and families may help alleviate the temporary stresses that arise from migration

Principle: Family members may have different needs that are age and/or gender related and require unique service responses. It is important that newcomers be made aware of Canadian legislation in the areas of family law and child welfare.

6. Advocacy

Rationale/assumptions: It has often been said that settlement is a two-way street, implying that changes and adaptation are necessary for both newcomers and the host society. Advocacy/public education is a major tool for effecting such change

Principle: The role of agency staff and Board in doing advocacy work should be clearly outlined and time allocated for such activities.

7. Agency general practice standards

Rationale/assumptions: In addition to specific service content, immigrant serving organizations should adhere to a set of general service procedures, thus ensuring consistent service for all clients.

Definition: General practice standards apply to the client's initial contact with the agency, intake and assessment, and referral

Principle: It is important that clients not fall through the cracks, therefore necessitating tracking of referrals and requests for service that cannot be met by the agency.

8. Case coordination standards

Rationale/assumptions: Case coordination is a collaborative service coordination effort undertaken for/with clients to ensure that service needs have been met.

Definition: When a client requires services that are provided by multiple service providers, service coordination and follow-up may be required to ensure that clients needs are being met.

Principle: Clients are encouraged to take on responsibility for their service direction

APPENDIX D

The 30 general competencies excerpted from "English Language Development and Settlement Service Worker Complete Competency Dictionary" produced by the British Columbia Immigration Integration and Multiculturalism Branch Ministry of Regional Economic and Skills Development.

Area: Settlement, Culture and Multiculturalism

	Competency	Description
1	**Understand and promote theories and definitions of culture, settlement, multiculturalism and immigration**	Understand the impact of values, systems, beliefs and attitudes on behavior
		Make the distinction between linguistic and cultural interpretation
		Understand the impacts of immigration on family and economic life and the stages of individual adjustment to settlement
		Understand patterns of global migration, refugee issues and immigration trends/issues
2	**Demonstrate an ability to work with individuals and communities suffering from discrimination, racism and culture shock**	Understand the concept of culture shock and support clients to change and adapt
		Understand theories and history of racism, stereotyping, bias and discrimination and identify racist and discriminatory behaviors
		Understand and practice theories of cross-cultural communication, counselling and support
		Understand and support clients through the stages of grief and loss
		Promote and support the inclusion of diverse groups
		Understand theories of cultural change and diversity
3	**Understand the Canadian legal system, laws and public policy**	Understand theories and practice of social justice and public policy
		Understand legislative structures and processes
		Understand relevant Canadian laws (local, provincial and federal) such as legislation concerning: employment, human rights, privacy, tenant regulations and rights, health and safety

4	**Understand major events in Canadian history pertaining to culture, settlement, multiculturalism and immigration**	Understand key events such as the founding of Canada (First Nations, Settlers), western expansion, immigrant labour building railways, exclusion acts and incidents (e.g. Komagata Maru, head tax on Chinese immigrants, internments, Residential School Act issues etc.), 1970's shift to open immigration, 1990's shift to family verses economic class immigration etc.

Area: Accountability and Professional Ethics

	Competency	Description
5	**Maintain personal health and wellness**	Practice health and wellness principles such as stress management and creating professional boundaries
		Understand and practice organizational policies and guidelines related to setting and maintaining professional boundaries
		Prepare for change
		Demonstrate flexibility and adaptability
6	**Act ethically**	Demonstrate an understanding of privacy protection and informed consent; demonstrate confidentiality
		Understand the impact of personal values and beliefs on practice
		Understand and recognize situations involving conflict of interest
		Act with integrity
		Recognize personal limitations
		Demonstrate a knowledge of codes of ethics
		Be accountable to immigrants, community members, colleagues, managers, funders and others
7	**Practice ongoing learning and development**	Stay up-to-date on area of expertise including trends and issues in the professions of settlement and language workers
		Identify personal learning style(s) and preferences

		Learn on an on-going basis
		Demonstrate knowledge of relevant professional and sectoral organizations
		Seek out education, training or work experiences that will enhance knowledge, understanding and ability to work effectively
8	**Practice time and resource management techniques**	Understand and demonstrate time management techniques such as priority setting and minimizing the waste of resources

Area: Groups and Relationships

	Competency	Description
9	**Demonstrate team work**	Understand theories of group dynamics and team development
		Understand socio-political influences on groups and communities
		Identify sources of information relevant to colleagues, clients or network members' needs
		Demonstrate the ability to work collaboratively with individuals and diverse groups of people
10	**Demonstrate conflict resolution techniques**	Minimize conflict and resolve conflicts respectfully
		Understand strategies for resolving conflicts
11	**Demonstrate networking and relationship building**	Understand network development techniques
		Develop and maintain effective, trusting relationships internal or external to the organization
		Research and identify possible contacts in the community or organizations and understand their role
12	**Practice personal performance management**	Give and receive feedback

Area: Communications

	Competency	Description
13	**Practice effective interpersonal and intercultural communication techniques**	Seek clarification when needed
		Identify, select and use appropriate tools and strategies for effective interpersonal and intercultural communication
		Facilitate the exchange of information, ideas and strategies
		Read, analyze and interpret complex verbal and non-verbal information
		Practice organization's standards of effective written and verbal communication
		Communicate with cultural understanding and sensitivity
14	**Practice active listening**	Practice active listening
15	**Demonstrate strong written communication skills**	Write clearly and accurately
		Write to an audience with limited or low levels of English language literacy
		Record, summarize and document communications with others
16	**Demonstrate strong verbal communication skills**	Speak clearly and in a way that maximizes listener understanding
		Speak to an audience with limited or low levels of English language proficiency
		Identify needs of audience/listener
		Convey concepts to an adult audience through presentations, discussions and other group activities
17	**Demonstrate empathy**	Be sensitive to the values of others, attempts to understand other points of view
18	**Demonstrate computer proficiency**	Send and receive emails and conduct internet research
		Input data into a database e.g. STaRS
		Write and format a letter in MS Word, create a basic spreadsheet in MS Excel

Area: Human Rights and Advocacy

	Competency	Description
19	**Advocate for the human rights of immigrants**	Understand the concept and principles of human rights
		Identify violations of human rights
		Demonstrate knowledge of the process for making a human rights complaint
		Keep up-to-date with current trends and issues related to human rights, immigration and inclusive communities
20	**Demonstrate human rights advocacy techniques and demonstrate a knowledge of precedents**	Understand the barriers that prevent inclusion and the needs of immigrants, groups or communities who require advocacy
		Represent "constituency" within a variety of forums and advocate for community and organizational change
		Select and use appropriate communication strategies to support positive change
		Identify and access appropriate media contacts, government representatives, network or community leaders
		Understand individual, organizational or community priorities and the nature of the desired change
		Demonstrate knowledge of available advocacy resources and public policies that support advocacy goals
		Demonstrate knowledge of previous advocacy efforts, experiences and precedents that can enhance current advocacy activities
21	**Demonstrate effective negotiation & persuasion techniques**	Understand the principles of negotiation
		Set goals and evaluation criteria
		Work towards streamlined processes
22	**Demonstrate leadership and support the development of leaders**	Understand the concepts of leadership and empowerment
		Develop personal leadership qualities
		Support the development of leadership qualities in others Identify and use strategies to empower others.

Area: Community

	Competency	Description
23	**Promote the development of inclusive communities and support community forums and initiatives**	Understand principles of community development and strategies to promote the concept of inclusive communities
		Utilize community forums as agents of change and opportunities to promote the development of inclusive communities
		Develop and maintain relationships within the community
		Understand the history and demographics of the community and relevant community dynamics
24	**Identify and access community services and resources**	Identify accessible community services such as housing, child care, adult day care, recreation, transportation, education, training, health and wellness options, volunteer organizations and services, banking options, interpretation and translation services and language instruction.
		Understand the basic concept of Canadian Language Benchmark (CLB) levels to help determine when to refer clients for an ELSA assessment
25	**Demonstrate an understanding of the BC labour market, provincial employment standards and job search/interviewing techniques**	Identify potential job and volunteer opportunities
		Identify suitable training and educational opportunities
		Understand the procedures for security and criminal record checks
		Identify suitable employer and professional associations
		Understand basic BC labour market trends and opportunities
26	**Demonstrate an understanding of social service programming for immigrants**	Demonstrate knowledge of principles of program development, implementation and evaluation
		Understand the concepts and theories of organizational culture development
		Describe organization's programs, services and network partners to the community

		Understand the organization's mission, values, policies and structure
		Understand the roles and responsibilities of staff within the organization
		Understand sources of funding, the role of volunteers and collaboration with network partners
		Understand and use data collection systems (e.g. STaRS)
27	**Create, maintain and access records**	Understand organizational policies around record keeping
		Understand Freedom of Information regulations and how they apply to the organization and the immigrants supported by the organization
28	**Assess client needs, suggest system and service improvements**	Understand the principles of a needs assessment process and the characteristics and needs of clients served by the organization
		Contribute to needs assessments and program evaluations
		Understand referral systems and ranges of programs and services available
		Support the organization to change and improve its ability to meet or exceed the needs and expectations of diverse groups of immigrants and funders
29	**Demonstrate knowledge of terms of employment, organizational policies and procedures**	

Area: Critical Thinking and Problem Solving

	Competency	Description
30	**Demonstrate critical thinking and problem-solving techniques**	Understand and apply the basic principles of decision-making processes/strategies and approaches to critical analysis and evaluation
		Participate in collaborative problem solving
		Identify the strengths and limitations of ideas and proposals
		Clarify and assess situations complex situations and information
		Analyze and interpret data
		Identify possible resources, additional information or data to solve problems
		Exercise professional judgement
		Systematically plan, implement, assess and improve programs, services and systems

APPENDIX E

Except from the Alberta Association of Immigrant Serving Agencies; Framework of Occupational Competencies for Settlement Practitioners 2010. The framework elaborates related theories, concepts and principles that settlement workers should know, related skills they should possess and facts, data and information of which they should be aware. It also goes into detail about the activities and indicators of good practice for each.

ROLES (represent scope of practice of all workers in the sector)	FUNCTIONS (broad areas of responsibility workers need to assume to fulfill Roles)	ACTIVITIES	INDICATORS OF GOOD PRACTICE	SPECIFICATIONS FOR KNOWLEDGE AND SKILLS (needed to perform all functions)
I. Provide support and services to immigrants	A. Support immigrants to adjust to life in Canada			
	B. Provide relevant services to immigrants			
	C. Support the physical, social and emotional well-being of immigrants from diverse cultures and backgrounds	**Activities, Indicators of Good Practice** and **Specifications for Knowledge and Skills** relate to each Function for each Role.		
	D. Facilitate immigrants' entry into the Canadian workforce			
	E. Facilitate settlement-based language services			
II. Advocate for systemic change and community collaboration to promote social and economic inclusion for immigrants	A. Contribute to the development of inclusive communities			
	B. Contribute to public education on multiculturalism, immigration, anti-racism and human rights issues			Areas of Knowledge and Skills:
	C. Contribute to stimulating and supporting action to address barriers and inequalities	Daily activities performed by workers to fulfill each Function	Indicators of good performance – either the expected outcome or the process	1. Settlement, culture and multiculturalism 2. Accountability and professional ethics 3. Groups and relationships 4. Communication 5. Human rights and advocacy 6. Communities 7. Organization and systems 8. Critical thinking and problem solving
III. Contribute to the effectiveness of the organization	A. Create and maintain a safe, welcoming and inclusive environment			
	B. Develop and maintain information, records and data to enhance services			
	C. Contribute to the enhancement of human resources within the organization			Each of these areas includes specific details about:
	D. Contribute to organizational planning, evaluation and improvement			☐ The **theories, principles and concepts** workers need to understand
IV. Maintain professional development and support the development of others	A. Plan and implement a professional development plan			☐ The **skills** they need to demonstrate ☐ The **facts, data and information** they need to know or find out about
	B. Support the development of others			

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