

RECONFIGURING
SETTLEMENT AND INTEGRATION:
A SERVICE PROVIDER STRATEGY FOR
INNOVATION AND RESULTS

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FOREWORD

This study was commissioned by CISSA-ACSEI: the Canadian Immigrant Settlement Sector Alliance - Alliance canadienne du secteur de l'établissement des immigrants. CISSA/ACSEI was formed in March 2005 to represent the immigrant settlement sector and to bring the sector's expertise to bear on public policies and programs for enhancing the settlement and integration of immigrants and refugees. CISSA-ACSEI is dedicated to creating a society in which all immigrants and refugees are able to participate fully. The study is consistent with this objective. Its purpose is to take stock of emerging trends and to map a way forward that will allow settlement service providers to acquire the tools and capacities they need to partner with governments in meeting the challenges facing both newcomers and the communities in which they settle.

The study was made possible by the generous assistance of the provincial settlement umbrella organizations that helped to organize workshops and meetings on behalf of the study's author. As well, thanks is owed to the many service provider representatives, federal and provincial officials and others who agreed to often lengthy interviews and provided important insights into service delivery and public policy issues.

CISSA-ACSEI commends the study to interested stakeholders as a first, serious step towards fundamental realignment in how the sector is organized and how it comports itself. Settlement organizations want to play a larger role in shaping and contributing to the future of Canada. They feel they have a great deal to offer. The study suggests ideas for increasing their involvement and influence.

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EXECUTIVE SUMMARY

The study – Reconfiguring Settlement and Integration: A Service Provider Strategy for Innovation and Results – was commissioned by CISSA-ACSEI (Canadian Immigrant Settlement Sector Alliance). The study is designed to help settlement service providers anticipate new developments and bolster their capacities so they are better able to partner with governments and other stakeholders to meet the challenges facing newcomers and the communities where they reside. The analysis is based on workshops, focus groups and interviews with the heads of settlement organizations and ethno-specific agencies across Canada. Interviews were also conducted with senior provincial and federal officials as well as executives from United Ways and community foundations. Where available, the study tapped academic and government research, including program evaluations and policy assessments.

The paper advances the following arguments:

- ❖ That successful settlement and integration measures require governments and settlement organizations to work collaboratively;
- ❖ That the settlement sector possesses unique skills and knowledge acquired by virtue of its work with newcomers and institutions that interact with newcomers;
- ❖ That meeting emerging challenges requires precisely those skills in which settlement organizations enjoy a comparative advantage; and
- ❖ That there exists a shared interest by governments and the settlement sector in expanding the sector’s intellectual and mediating capacities, distinct from the sector’s service delivery capacities.

The skills and knowledge possessed by settlement agencies are embodied in four strategic capacities that are unique to the sector. These are:

- ❖ 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 neighbourhoods and to promote ‘bridging’ between mainstream and newcomer communities; and
- ❖ An ability to bring together services in times of crisis.

The specialized knowledge possessed by settlement agencies and the trust they enjoy among newcomers and newcomer organizations can only be acquired tacitly by engaging in integration activities and mediating relations between mainstream and ethno-specific organizations. Settlement agencies solve problems for individual immigrants, immigrant families and communities by creatively assembling government programs and other stakeholder services. Governments cannot do this because program knowledge is generally siloed and ministries tend to be unfamiliar with program intersections and interactions.

The fact that the settlement sector's strategic capacities must be acquired 'on-the-job' means that the sector's strengths cannot be replicated by other agencies, thus constituting a durable, strategic advantage.

Anticipated challenges and required capacities

A range of important challenges face settlement practitioners and policymakers. Addressing these challenges will require capacities that favour the settlement sector

- ❖ Policy reviews point to growing concern with long-term integration and with social and cultural goals such as fostering belonging and promoting engagement. Implementing these directions will require assembling a more complex array of services for a longer duration. It will also require more attention to local receptivity.
- ❖ Concern with budgetary deficits will cap or reduce settlement spending, forcing settlement agencies to compete for support within a shrinking social policy envelope. Innovation and an ability to leverage support from new sources represent critical responses to anticipated fiscal pressures.
- ❖ Social inclusion will become an increasingly important priority. Immigrant poverty, particularly among visible minority populations in and around major cities, constitutes an existential threat to the immigration program. Combating social exclusion will require more complex interventions and social bridging.
- ❖ Provincial and municipal interest in immigration is growing, including demands for integration services in cities with limited integration service capacity. Municipal institutions and mainstream organizations will need help from service providers in order to attract, retain and integrate newcomers.
- ❖ Increases are expected in the flow of highly-skilled, fully-fluent immigrants who can be served by mainstream organizations as well as the flow of lower and mid-skilled entrants who require the sustained assistance offered by service provider agencies.
- ❖ Increased settlement funding and government willingness to experiment with service delivery has brought new competitors into the settlement arena. Measures such as service vouchers expand this 'threat'.

Recommendations

The report offers fifteen recommendations aimed at clarifying the sector's strategic directions and strengthening its strategic capacities. These recommendations are grouped below into seven clusters.

1. The report places enormous emphasis on expanding the intellectual and analytic capacities of the settlement sector. This is seen as crucial to promoting social innovation. More specifically, the proposed investments in intellectual capacity are essential for capitalizing on the sector's entrepreneurial abilities, for mobilizing tacit knowledge and disseminating best practices, and for supporting a true partnership with government based on mutual respect and expertise. The report argues for the creation of two key institutions: a sector-led, pan-Canadian body comprised of

- settlement agencies and university-based researchers that would analyze and disseminate best practice information; and an arms-length, tri-partite institution (settlement sector / governments / researchers) that would enjoy a degree of autonomy and would undertake studies based on independent decisions or in response to references by the participating bodies.
2. To finance the settlement sector's intellectual development, the report proposes three broad changes in existing financial and accountability regimes (recognizing that provincial differences negate some proposals). Chief among these is the immediate implementation of the Blue Ribbon Panel's recommendations on accountability and financial management. The report also calls for government financing of corporate activities including research, analysis (of best practices), and strategic and human resource planning. Lastly, the report recommends that immigrant settlement agencies extend the use of cost recovery for the advice they provide to public, quasi-public and commercial organizations. Cost recovery could take the form of direct charges to the organizations receiving the advice or costs could be recovered from interested third parties.
 3. With a view to reinforcing its strategic advantage (a function of its holistic approach to assessing individual and family needs and assembling services accordingly), the settlement sector should undertake a pan-Canadian study of the feasibility and desirability of implementing shared, cross-agency, needs assessment facilities. The study should advise on the scope of needs assessments; it should propose standard templates to capture information; and it should recommend a data system that would be useful to clients, agencies and government. In addition, the study should examine the advantages and disadvantages of shared assessment facilities in regard to service specialization and local strategic planning endeavours.
 4. In order to create a stronger strategic focus, the settlement sector should conduct an internal study to map the areas in which it enjoys a comparative advantage over mainstream and commercial service providers. This mapping should delineate the newcomer populations, geographic locations, immigrant services and policy areas in which the sector should specialize. Specific topics to be investigated by the study include the sector's role in providing language and employment services; interactions with immigrant services located in quasi-public institutions such as schools and libraries; and the cost and service implications of rising proportions of multi-barriered and low skilled clients in settlement agency caseloads. This shift is driven by policy changes and by program measures that divert easily integrated clients to mainstream agencies, community colleges and commercial operations while allocating difficult-to-settle residual cases to the settlement sector.
 5. With a view to strengthening the contribution that settlement agencies make to improving the receptivity of mainstream organizations to newcomers and to mediating their relations with ethno-specific associations (including faith-based

associations), the settlement sector should strike a task group with government. The task group would document the extensive organizational memberships, advisory roles and public awareness activities of senior agency executives, assessing their contribution to the formation of welcoming communities and developing recommendations for how to promote and better support such activities. A parallel task group comprised of settlement agencies and ethno-specific organizations should be formed to determine how best to strengthen connections between the two sets of organizations and to enhance the collective capacity of ethno-specific associations.

6. The settlement sector should undertake a careful, pan-Canadian reassessment of the services it supplies to temporary workers (and their families) and to long-time residents and citizens. The temporary worker review would assess the impact of temporary workers on the communities in which they reside; it would clarify the sector's role in working with employers and municipalities to enhance receptivity and equitable treatment; and it would recommend a set of graduated services for workers and their families (depending on the likelihood they will remain). The long-time residents and citizen's review would similarly identify areas of vulnerability and recommend changes to existing practices, accompanied by ideas for financing the additional services.
7. The settlement sector should undertake a pan-Canadian review of best practices in two areas: The first area involves service delivery to remote or under-served locations. The review would examine the opportunities for service providers to employ new technologies, to promote self instruction, and to contract for outreach services by agencies based in larger cities. Special attention would need to be paid to Francophone minority communities and to the possibility of creating regional consortia to deliver services. The second area would focus on pilot projects that involve integrated, community-led planning aimed at developing more welcoming communities. The review would recommend financial, logistical and research supports that would allow settlement agencies to play a lead role in local planning consortiums.

CHAPTER 1: INTRODUCTION

The goal of this paper is to ensure that settlement agencies have the capacity to fully partner with governments in designing policies and programs to meet the emerging challenges facing newcomers and the communities in which they settle. This is not, presently, the case. While settlement organizations possess major assets - hands-on experience, knowledge, commitment and an ability to leverage engagement – they lack the means to fully capitalize on those assets. This incapacity affects not only the agencies but also the sector as a whole. What is needed is a new strategy to equip settlement agencies to build on their comparative strengths and to enhance their analytic and strategic capabilities. This will require changes in sector organization, financing, accountability and relations with government. Most fundamentally it will require changes in how the sector views itself and how it comports its affairs with governments and other stakeholders.

To be clear, this paper is not about settlement service needs or policy gaps. It is about sector organization and institutional capacity. There are several reasons for this, the most important being that this is the topic that settlement organizations felt needed to be addressed and where their principal challenges occur: in applying and obtaining stable funding from government; in fiscal management and accounting for expenditure; in financial and human resource planning; in strategy development; in sharing best practice knowledge; in local engagement; and in managing government relations.

Additional reasons for not focusing on services and gaps had to do with the lack of solid, recent information on client outcomes and needs. Much of the evaluation information in the public domain is outdated and, in many cases, of dubious quality. At the same time, research studies have tended to look at fairly small samples while information collected by settlement agencies is not comparable and cannot be aggregated. In short, while gaps and problems undoubtedly exist, evidence and data on which to base a solid analysis do not. As a result, any attempt to move in this direction is unlikely to be persuasive and would not be taken seriously by the major stakeholders.

The organization of the paper reflects its purpose: to build an unassailable case for equipping settlement agencies to engage governments as a full partner. The arguments in this and subsequent chapters are designed to advance this objective and to launch a corrective process. The structure of the arguments (though not of the paper) is as follows:

- ❖ That for settlement and integration to succeed, governments and settlement organizations must collaborate;

- ❖ That the settlement sector possesses a unique set of skills and knowledge - not available to other stakeholders - that it acquires by virtue of its orientation and interactions with newcomers and their associations;
- ❖ That meeting future challenges will require precisely those skills for which settlement organizations have a comparative advantage;
- ❖ That there exists a shared interest on the part of both governments and the settlement sector in investing in the sector's intellectual capacities. This is distinct from the sector's service delivery capacities.

The latter three arguments will be developed in subsequent chapters; however, because the case for collaboration is fundamental to all that follows, it is presented at the outset. The argument for collaboration in the area of settlement and integration is especially compelling because of the manner in which services to newcomers and to receiving communities are delivered and financed. From a structural perspective, government agencies have the primary responsibility for policy design and program financing while settlement service providers have the primary responsibility for service delivery. Other organizations are also involved, but governments and service providers are, by far, the most important actors.

At first glance it might seem that the dependency vector operates in only one direction and that arrangements between governments and service provider organizations (SPOs) are cut and dry, a straightforward matter of purchase and delivery. In practice, however, what governments ask for and what agencies deliver is somewhat elastic. As well, governments depend on service providers for more than immigrant services.

One of the more important explanations for the elasticity in service delivery has to do with the fact that settlement agencies obtain funding from many sources – federal, provincial, municipal, as well as United Ways and community foundations. This allows agencies a degree of independence in terms of who they serve and what they deliver. The SPOs interviewed for the study reported a bewildering array of financial arrangements. A further source of flexibility originates in the volunteers that SPOs employ and for whom they are not accountable to anyone.

On the government side, there is a similar blurring of functions coupled with the fact that governments are not wholly captive to SPOs. Governments have not entirely abandoned service delivery, especially in the areas of information provision and outreach. As well, in recent years, governments have started to experiment by involving quasi-public and private organizations in some aspects of service delivery.

But to focus exclusively on services is to misunderstand the nature of settlement and the full influence of settlement agencies. In fact, the name – service provider organizations – is misleading and makes the mistake of assuming that what governments pay for is what agencies are. The truth is rather different. In addition to providing the services that governments finance, settlement agencies – typically, the executive director and senior agency staff – also participate in an extensive network of advisory councils, corporate and

agency boards, and diversity committees. Their 'job' is to supply expertise, community connections and influence. (This point will be developed in Chapter 4.) Settlement agencies also serve as key intermediaries, mediating and interpreting government actions on behalf of cultural communities and, frequently, the media. This is not a wholly passive function. How communities 'understand' government and how government actions are described by the media to the public is an important component of integration and a critical driver of key outcomes such as belonging, cohesion and engagement. Finally, governments depend on settlement agencies for information on policy fit, program effectiveness and client receptivity. This is a critical component of program and policy design and speaks to the role of settlement agencies as social innovators and aggregators of best practice information.

The combination of mutual interdependence coupled with elasticity in the ties binding governments and service providers offers a great deal of scope for misalignment in government-agency directions. Such differences are costly. They create friction, produce mistrust and, ultimately, undermine the capacity of the sector as a whole to address new challenges and meet the needs of both immigrants and communities.

A fundamental premise of this paper is that there exists a shared interest on the part of governments and settlement agencies in working together to avoid problems of misalignment. As well, there is a shared interest in contributing and enhancing each other's capacity to address emerging needs. The basis for this shared interest lies in the common goal of benefiting immigrants and communities. Of course, disagreements are still possible because of different priorities and different assumptions about methods and efficacy; however, on fundamental questions such as capacity building there will almost certainly be agreement. With sophistication and trust, this can be carried over to a better understanding of the constraints under which each party labours – for example, the need for evidence and accountability by government and the need for legitimacy and advocacy by communities. More on this later.

While the preceding discussion focused on the impetus for collaboration, the discourse below focuses on the impetus for change. Change and the need to get ready for change are frequently invoked by social marketers and vendors of ointments. Occasionally, the warnings and invocations turn out to be correct. That appears to be the case with settlement. A compelling argument can be advanced that the current delivery system is about to change. The reasons for this are discussed in greater detail in Chapter 3, however, there has been ample evidence that the federal government is not happy with the way the immigration system has performed. The fiscal crisis is merely serving as a catalyst, accelerating the pace of reform. Three main triggers can be identified: dismay over immigrant economic outcomes, including low incomes and poverty; poor evaluation results for the major settlement programs (these have not yet been released); and concern that long term integration is foundering, with negative consequences for social cohesion and citizenship. It is this cocktail of poor outcomes, weak inputs, new problems and financial pressure that portends reform. The choice facing settlement agencies is not whether to

change but how. The core idea advanced in this paper is that the sector look to its strategic strengths to make a compelling case for why it must play a key role in addressing the challenges that are on the horizon. This report suggests how this case can be constructed.

CHAPTER 2: METHODOLOGY

Multiple sources of information were accessed in the course of developing this paper. The primary source was a series of workshops and focus groups with representatives of service provider organizations and ethno-specific agencies. Typically, the attendees were the executive directors or senior officials of the organizations at the table. Focus groups and meetings took place in Vancouver, Calgary, Winnipeg, Toronto and Halifax. In the case of Montreal, only the provincial umbrella organization was interviewed. Where possible, an effort was made to include representatives from smaller centres.

Attendees were asked about the challenges facing the settlement sector as a whole, as well as the specific challenges facing service providers and other non-profit agencies. They were also asked about their capacities in relation to the anticipated challenges. Other topics that were explored in detail included the sector's relations and interactions with the federal and provincial governments, as well as the intricate web connecting service providers with ethno-specific agencies, municipalities and various mainstream institutions. An important focus of the workshops was on how to improve program and policy links with government agencies and how to reduce tensions around financial and program management, around monitoring and around other essential transactions.

The workshops were supplemented by face-to-face interviews with the heads of settlement agencies in order to pursue issues that surfaced during the workshops, to get a better understanding of financial arrangements and to test ideas about the sector and its needs. The in-person interviews were supplemented by teleconferences in order to obtain the views of agency heads from second and third tier cities.

In addition to the interviews with settlement agencies, interviews were also conducted with senior provincial and federal (regional and national headquarters) officials. Typically, these meetings included the most senior official in the region or division, accompanied by colleagues who specialized in various programs. The questions were similar to those used with service providers along with specific queries regarding program effectiveness, future directions and perceptions of the strengths and weaknesses of settlement agencies. The meetings also explored connections between the different levels of government and where these were expected to evolve.

Finally, in some of the larger centres, interviews were conducted with executives from United Ways and community foundations.

In all cases, interviewees and workshop attendees were assured of confidentiality.

In addition to the interviews, the study tapped into academic and government research, including program evaluations and policy assessments. These included policy and planning studies conducted by the author on behalf of a number of federal, provincial and international bodies.

Lastly, the analysis has benefited from the comments and suggestions of two project advisory bodies: the Settlement Sector National Reference Group and the Academic Advisory Committee. (See Annex A.) The National Reference Group was composed of Canadian Immigrant Settlement Sector Alliance (CISSA) / Alliance Canadienne du Secteur d'Établissement des Immigrants (ACSEI) executive committee members and invited colleagues from Ontario and Quebec; the Academic Advisory Committee consisted of university-based researchers with an interest and expertise in the area of immigration, diversity and integration.

Note: The study did not expressly analyze the role of provincial and regional umbrella associations and national bodies such as the Canadian Council for Refugees. For this reason, Chapter 5 is silent on the relationship between currently existing umbrella associations and the new institutions proposed in Recommendations 1 and 2. The larger umbrella organizations, OCASI (Ontario Council of Agencies Serving Immigrants) in particular, play an active role in supporting member agencies, conducting studies, undertaking policy consultations and engaging in advocacy. How these capacities and those of other agencies might contribute to the work of a pan-Canadian body that focuses on best practices and policy analysis is something the settlement sector will need to resolve. In approaching this task, four points should be kept in mind: first, that service provider organizations strongly supported the idea of enhancing the intellectual and analytic capacities of individual agencies and of the sector as a whole, *notwithstanding* the existing work of the umbrella organizations; second, that analytic capacities are unevenly distributed across the country; third, that the creation of a *pan-Canadian* body, by significantly expanding the portfolio of agency practices available for analysis, would enrich the sector as a whole; and, fourth, that recommendations by a *pan-Canadian* body would carry far more weight than those proposed by regional or provincial organizations.

CHAPTER 3: A CHALLENGING FUTURE

Economic, demographic and social changes are challenging established models of organization and service delivery. Adjusting to these changes will take time and planning. The way forward is complicated by the fact that important government decisions are pending and, equally, by the fact that the settlement sector, notwithstanding increases in government expenditure, is stretched in multiple ways and lacks the capacity to conduct its own strategic assessment. To navigate the transition settlement organizations will need to know where to focus their efforts, what capacities to expand, what partnerships to develop and how to create more effective relations with government. The aim of this chapter is to help the sector manage these critical decisions.

The analysis of anticipated changes in the settlement arena provides the basis for a series of claims about the sector's essential role in integration. It follows that a strong consensus around the projections should translate into equally strong support for recommendations aimed at improving the muscularity and focus of settlement organizations. For this reason, it is worth underlining that there is little dispute about the anticipated challenges. Though minor differences exist in regard to their gravity or risk, it would be surprising if the major stakeholders did not all agree on the practical importance of addressing the concerns raised in this chapter.

Six broad, interrelated factors are highlighted below. They are expected to exert pressure, both direct and indirect, on integration processes, government policies and service provider capacity. A particularly important distinction for both service providers and policymakers is that between global forces that cannot be altered by domestic actions and factors that are malleable and responsive to national, regional or local interventions. In the former case, the only possible course of action is adaptive (which does not mean that only one course of action is available); in the latter, the options are much broader. An analysis of the factors follows.

The public sector in flux: rethinking settlement

The fact that settlement organizations depend so heavily on governments for support and programming means that they are correspondingly impacted by changes in government capacity and orientation. Any assessment of settlement 'futures' must take into account public policy directions and how these will affect settlement agencies. Because of this, the first factor to be considered focuses on government and where it is heading.

Governments at all levels are rethinking their role and objectives in relation to newcomer integration. The reasons have to do with fiscal pressures, worries about poor integration outcomes, worries about the efficacy of current programs, growing interest in diversity by second and third tier cities and concerns about the long-term effects of immigration on Canadian society. The result is a plethora of reviews and reassessments indicating, if nothing else, that business as usual is no longer an option. Something fundamental has shifted and settlement agencies need to recognize this and make some important adjustments. The shape of these adjustments can be inferred from the issues that are occupying governments.

Three major reassessments are underway at the federal level: A government-wide Strategic Review that implicates all federal ministries and is linked to the budgetary process; a settlement review that is looking at the spectrum of federal settlement programming, including services, delivery systems and relations with provinces; and a modernization initiative that is already being rolled out but is still somewhat plastic.

Supplementing and injecting a note of urgency into these exercises are major evaluations of Citizenship and Immigration Canada's main settlement programs - LINC, ISAP and Host¹ - as well as evaluations of the refugee Resettlement Assistance Program (RAP) and of Canada's Action Plan Against Racism (CAPAR). Adding to this list is a planned review of COIA, the Canada-Ontario Immigration Agreement, which is up for renewal later in the year. The COIA review has raised basic questions about the federal role in newcomer integration. Lastly, Citizenship and Immigration Canada must offer a response, no later than July, to the recommendations contained in the recent Standing Committee report on Best Practices in Settlement Services. Many of the Committee's recommendations are in line with those proffered in Chapter 5.

Other actions with important implications for settlement agencies are the labour market agreements being negotiated between the federal and provincial governments; province-specific measures, such as the renewal of British Columbia's tendering process; and expanded municipal involvement in diversity planning. Still, the most important activities for the settlement sector are the federal reviews because they will have a direct impact on settlement agencies as well as a downstream impact on provincial capacities and programs. A brief discussion of these reviews follows.

At its heart, the strategic review - like an earlier review in the nineties that produced a substantial devolution of federal immigration responsibilities to the provinces - is a wide-ranging, cost-driven exercise that starts by examining the need for continued federal involvement and, if the answer is positive, follows by assessing the need for continued

¹ LINC refers to the Language Instruction for Newcomers to Canada Program; ISAP refers to the Immigrant Settlement and Adaptation Program; and HOST refers to a matching program in which Canadian volunteers help refugees and newly arrived immigrants adjust to life in Canada.

expenditure.² Within Citizenship and Immigration, the major impact of this review will almost certainly fall on settlement which accounts for the bulk of departmental expenditure. Other measures, such as changes to the selection system, may also be on the table, in part because selection choices drive downstream settlement costs.

The most likely near-term effect of strategic review will be a modest budgetary cut in settlement expenditure – reductions in the range of ten percent would not be surprising – accompanied by directions for further savings to be achieved through restructuring of settlement and selection programs in line with the government’s overall deficit reduction timetable.³ The inability of CIC to demonstrate either significant service enhancements or improved integration outcomes following the enormous funding increases that took place in 2006 has made the sector as a whole vulnerable to cuts and restructuring. The salient point is that the discontent extends beyond CIC to the centre of government and that CIC and settlement organizations will need to work closely together to understand what took place and to develop a sound case for maintaining high levels of expenditure on settlement programming and other sector activities.

While Strategic Review has provided little room for settlement agencies to get involved, the Modernization Initiative and Settlement Review will offer multiple opportunities for engagement. Both exercises have the potential to transform service delivery, so it is imperative that settlement organizations pay close attention and react in a thoughtful manner. Change, especially transformational change, carries risk; however, as this report underlines, the status quo is no longer viable. Modernization and Settlement Review offer settlement agencies important opportunities to re-invent themselves on a more dynamic and powerful platform. So, too, does the recent Standing Committee report. The sector needs to seize these opportunities.

Settlement Review has yet to make its appearance, however, it and Modernization should be seen as conjoined twins. Taken together, Modernization and Settlement Review constitute an attempt to redirect the settlement program away from its narrow preoccupation with early adjustment and economic self-sufficiency to a broader, longer-term focus on societal integration.⁴ This shift will direct more attention to social, economic and cultural interactions between newcomers and their native-born hosts. It will also direct attention to how families integrate and how communities can be made more welcoming so as to foster belonging and active citizenship. The importance of these realignments was signalled in the government’s recent Speech from the Throne.

² Interestingly, the principle of subsidiarity – taking decisions as close as possible to citizens – is present in the strategic review. How important it is relative to fiscal considerations remains to be seen.

³ Starting in 2010, budgets have been frozen for three years; as well, CIC is no longer able to shift funds between envelopes which is how the department financed important discretionary activities.

⁴ The ideas being described have not yet been approved by government. They represent a ‘reading’ of current political directions and departmental thinking.

To effect the new directions, bridging strategies will be needed to increase the involvement of mainstream institutions and municipalities in immigrant integration. Various 'models' to foster such connections are already operative across Canada. As well, federal-provincial agreements (both new and renegotiated accords) will likely seek to broaden and deepen provincial involvement, expanding the range of ministries that actively participate in newcomer integration. There are signs that the federal government is dissatisfied with current provincial arrangements and is concerned that increased federal integration expenditures have simply offset provincial investments. Future arrangements are likely to evolve in the direction of federal-provincial co-management and more explicit financial and program undertakings. This is true of the recently renegotiated British Columbia agreement which has tightened up outcomes.

To date, the changes implemented under Modernization have concentrated on increasing programming flexibility and eliminating program silos. Views within the settlement sector about the importance of these changes are mixed but this is largely a result of how the program has been rolled out and the stifling effect of the current accountability process. This will change once CIC 'modernizes' its accountability regime, as other departments have already done, in line with the recommendations of the Blue Ribbon Panel, an outgrowth of the Voluntary Sector Initiative; equally significant changes will result if CIC's current efforts to shift program accountability metrics from outputs to outcomes show promise and gain traction.⁵

The potential implications for settlement agencies of the reviews that are underway are enormous. Much will depend on how the federal government chooses to advance its integration agenda and whether the settlement sector is willing, and able, to make the required changes. Chapter 4 argues that settlement agencies are the natural 'go-to' organizations for the federal integration agenda because they enjoy a comparative advantage vis-à-vis all other organizations in regards to integration – an advantage rooted in expertise and the trust they enjoy among immigrant communities. Achieving the necessary transformation will, however, require important changes in agency funding, in sector capacity and in relations with government. These points are developed in Chapters 5 and 6.

Federal and provincial budgetary deficits: managing in lean times

The methods and scale of federal and provincial efforts to tackle the deficits incurred while fighting the recession are becoming clear. At the federal level and in Ontario and (maybe) Quebec, a decade-long struggle appears likely. In Alberta, British Columbia and Manitoba, the provincial house will be brought back into order more quickly but federal difficulties will still have significant follow-on impacts on provincial programs.

⁵ This topic is of critical importance and is taken up in the recommendations.

What this means for the settlement and integration sector is that the expansion that fuelled the sector for the last five or so years has come to an abrupt halt. The most likely scenario for CIC, as noted above, is for a modest immediate rollback in federal settlement expenditure (which may not have much bite, as previous years' allocations were not fully spent) followed by steady pressure to rationalize the sector, to find efficiencies and to defend expenditures on the basis of proven settlement and integration outcomes.

Less predictable is what happens on other related fronts. Presumably, other federal ministries will find themselves under similar pressure to reduce spending. To what extent this will affect their willingness to participate in immigrant integration is not clear and may not be clear at this time even to the departments that are implicated in integration.

Of course, as noted above, it is not only the federal government but also provincial governments that find themselves in difficult financial straits. Ontario, in particular, is in trouble - which is especially worrisome given the size of Ontario's immigration intake. Not only will the Ontario government be facing large deficits and expenditure cuts, but the province's absorptive capacity has been seriously impacted by the loss of manufacturing jobs to globalization and economic restructuring. This suggests that expenditures will shrink at precisely the time that settlement needs rise. Other provinces are similarly affected but to a lesser degree.

Where does this leave settlement? The most likely answer is that the sector will find itself in a shrinking social policy envelope having to compete against other organizations, including not-for-profit agencies, for a share of a reduced funding pot. Having allies will help. In particular, federal-provincial agreements - notwithstanding the fact that parties can withdraw with notice - may offer stability inasmuch as they are based on reciprocal undertakings and expectations that are harder to undo than standalone arrangements.

Beyond advocacy, two main avenues of adjustment are available to the sector. The first, which is already pursued by every agency interviewed for the study, is to place even more emphasis on funding diversification. Depending on province, a significant amount of settlement agency funding comes from sources other than CIC. These include provincial and federal ministries, foundations, the United Way and the private sector. (Increased diversification also comes at a cost, increasing pressure on the capacity of settlement agencies to develop applications, demonstrate expertise and manage a more complex array of programs.) The extent to which CIC cutbacks can be offset is impossible to estimate but excessive optimism would be misplaced given the pervasiveness of deficits and the overall importance of CIC financing.

The second course available to settlement organizations is innovation and service rationalization aimed at enhancing effectiveness and efficiency and limiting duplication. This course cannot be projected as it would require a series of deliberate decisions by settlement agencies and their government funders. The nature of this compact is addressed in Chapter 5.

Nexus between economic performance and newcomer composition

Since the mid-eighties, the economic performance of immigrants has been markedly below that of comparably educated and skilled native-born Canadians. This represents a significant departure from earlier patterns in which immigrant earnings quickly eclipsed, and then surpassed, the earnings of the native-born. Recent immigrant cohorts have experienced higher, persistent unemployment and have seen their entry wages fall substantially to the point where they are unlikely to ever catch up to their native-born peers.

For a while, it was thought that the low-income phenomenon was transitory – a carryover of earlier recessions. Unfortunately, newcomer earnings have not recovered during subsequent periods of prosperity making it clear that the downturn in immigrant fortunes is not cyclical but relates to longer-term, structural changes in the labour market. Especially worrying, has been the growth in immigrant poverty. The proportion of immigrants, especially recent immigrants, whose incomes fall below the poverty line, exceeds that of native-born Canadians by several orders of magnitude. Moreover, there are signs that poverty is establishing itself and is being transmitted across generations, crimping the prospects of immigrant children whose parents have been especially hard-hit.

The reasons for the observed decline in immigrant economic fortunes are not fully understood. Economic research suggests multiple causes rather than a single, outstanding factor. The major culprits include: structural adjustments associated with globalization, including a decline in manufacturing capacity (a traditional entry point for immigrants), that have penalized all new labour market entrants, including women, recent graduates and immigrants; the growing importance of knowledge work and the associated premium on sophisticated language skills (beyond current language training provisions); growing newcomer economic and cultural ‘distance’⁶ that has led Canadian employers to sharply discount immigrant education, skill and experience credentials; and, crucially, discrimination of both the subtle and overt variety. Regardless of the explanation, the fact remains that immigrants are struggling and that plausible explanations for their plight do not admit to easy solutions.⁷

Of course, economic losses have not been confined to the immigrants alone. The fact that immigrants have not been doing well signals that Canada as a whole, while incurring the

⁶ Some part of the ‘penalty’ that immigrants suffer may be due to the inability of Canadian employers to judge the ‘qualities’ of immigrant applicants. This information shortfall may be responsible for risk-averse employer behaviour. Another part of the ‘penalty’ may be attributable to the fact that Canada’s modern economy produces different work ‘experiences’ and, hence, different skills than those produced by the economies of the countries from which Canada draws most of its immigrants.

⁷ The actual picture is somewhat nuanced with some newcomers doing relatively well while others are experiencing real difficulty.

costs of settlement, has not been reaping the benefits of enhanced economic productivity. At a minimum, this represents a significant loss of economic potential. But this is by no means all that is at stake. To a significant degree, immigration – especially skilled immigration - has been seen as a long-term, domestic economic project. The weakening of this objective undercuts the rationale for all immigration and throws into relief emerging concerns about the future structure and absorptive capacity of Canadian society. This challenge, in turn, has been amplified by the compositional shift towards visible minorities that occurred at the same time as immigrants' economic prospects plunged.⁸

Beginning in the early to mid-eighties, the proportion of European immigrants fell sharply at the same time as arrivals from Asia, Africa and the Middle East, the Caribbean and Latin America accelerated.⁹ Also associated with these changes was a pronounced shift in the religious landscape of Canada and a marked preference by both groups for settling in the largest metropolitan centres. Estimates by Statistic Canada¹⁰ indicate the scale of the transformation. By 2031, nearly one-third of all Canadians will self-identify as belonging to a visible minority group. Similarly, non-Christians will increase from eight to fourteen percent while the de-Europeanization of many Christian denominations will continue apace. Ninety-six percent of these minorities will be living in a metropolitan area. Looked at from a labour market perspective (using somewhat older projections), by 2017, 142 new visible minority entrants will be available to replace every 100 job leavers; for the rest of the population, only 75 entrants will be available to replace every 100 exits.

The coming together of these various trends is problematic. Put bluntly, the nexus of declining immigrant economic prospects, increasing visible minority composition and the concentration of minority populations in urban areas has meant that low income and poverty are developing an ethnic, racial and (non-European, non-Christian) religious face. And the fact that Ontario, Canada's largest immigrant destination, has been especially hard hit by the recession and by a loss of manufacturing capacity will likely exacerbate the situation. Immigrants arriving during recessionary and low growth periods have had a difficult time finding work, particularly in their field. The result has been 'scarring': a permanent depression in job prospects and incomes.

Neighbourhoods composed of racial and religious minorities living in poverty would be a disaster, not only for those affected but for Canada's immigration program as a whole. But this spectre cannot be wholly discounted given current economic trends and potential

⁸ Insofar as discrimination is concerned, the decline in earnings and growing proportion of visible minorities in the immigrant population are not merely contemporaneous but are causally related.

⁹ Approximately, three-quarters of new arrivals fall into the visible minority designation.

¹⁰ Statistics Canada, *Population Projections of Visible Minority Groups, Canada, Provinces and Regions 2001-2017*; A. Bélanger and É. Malenfant; 2005. See also, *Projections of the Diversity of the Canadian Population 2006 to 2031*; É. Malenfant, A. Lebel and L. Martel; 2010.

labour market stagnation.¹¹ The implications for settlement service provider organizations would be profound. Ominously, a number of SPOs reported difficulty in turning over their caseloads leading new arrivals to join existing queues. At a minimum, this confirms the need for sustained settlement investment; but it also signals a need to revisit funding regimes that prevent citizens and long-time residents from accessing settlement services at the same time as they are excluded from support under other regimes, such as employment training, because they have not spent enough time in the labour market.

While current rules leave some people in limbo – ineligible for settlement services but unprepared for mainstream offerings – they also threaten the connections between SPOs and the communities they serve. Service providers are finding it difficult to foster trust and maintain legitimacy while withholding services in ways that appears capricious to local communities and to the agencies’ own boards of directors. The upshot is that agencies are being forced to choose between losing community support and assuming unfunded liabilities (incurred as a result of ignoring government funding ‘boundaries’). Unless eligibility rules are made more flexible – a point noted in the Standing Committee Report on settlement - this tension, which also surfaces for temporary workers, will weaken agencies in precisely those areas where governments are heading and where SPOs’ strategic advantage resides.

Framing the problems that have been described in terms of social exclusion rather than loss of income makes the policy choices even starker. There is considerable evidence that social exclusion, once it has taken root, cannot be eradicated through standard, one-time interventions. Coordinated and sustained investments that target families and communities, will be needed. To the extent that exclusion manifests itself as a major problem (it certainly exists), the task of assembling (from multiple sources), coordinating and delivering complex interventions will fall, largely, to service provider organizations that enjoy the trust of the afflicted communities. These interventions will need to go beyond simply working with the ‘victims’; a sustained effort will also be needed to address institutional impediments and public receptivity.

The final point to be discussed in relation to degraded economic performance and rising poverty centres on public support and voluntarism, an essential feature of welcoming communities and a pre-cursor of inclusion and belonging. To date, the Canadian public has been remarkably supportive of investments in settlement. Research attributes this to the mostly positive encounters between native-born Canadians and immigrants. The flip side, however, is that negative experiences produce contrary effects. This raises the spectre that public support for settlement programming will decline as Canada’s (and especially Ontario’s) economic woes persist, accompanied by a withdrawal of neighbourly support. The result would be a vicious downward spiral of falling settlement expenditure, shrinking

¹¹ Academic research on this topic rejects the existence of ghettos but concedes concentrations of immigrants living in deep poverty.

volunteer support and impaired interactions between mainstream and immigrant communities, setting the stage for even greater economic problems and further blows to engagement and social cohesion.

Both for reasons of equity and risk, policymakers will need to respond forcefully to growing poverty: a loss of public support for integration would constitute an existential threat to Canada's immigration system. Settlement agencies will find themselves on the front line of this battle. The question is 'Are they ready?' To a degree they are. Settlement agencies are not unfamiliar with poverty. Nevertheless, there is a strong case to be made (as noted above in connection with the federal reviews) that the sector as a whole needs to improve its intellectual, coordinating and networking capacities, forming closer links with cities, employers and mainstream organizations. These capacities and connections are not strong as they might be, the result of chronic under-funding and insufficiently focused strategizing. Further investments are needed in several core areas. These will be elaborated below.

The rise of regionalization: growing municipal and provincial involvement

Regionalization in the form of trying to achieve a more balanced geographic distribution of the immigrant population will become an increasingly important policy issue for all three levels of government, as well as local stakeholders. What is driving this concern are worries about the economic and social sustainability of cities and towns that have not benefited from immigration, as well as, paradoxically, the difficulties encountered by regions that have started to see an upsurge in immigration but lack an adequate capacity to respond. Demographic issues linked to immigration have long been of concern to Quebec. Increasingly, however, they have started to figure prominently in the policy agendas of Manitoba, Saskatchewan, Alberta and the Atlantic Provinces. Municipal interest is of more recent vintage as the prospect of an ageing population and shrinking labour supply has sharply raised the profile of immigration at the local level. Cities are also motivated by economic ambitions that rely on diversity to attract investment, by fiscal concerns linked to population and by service challenges associated with an underdeveloped settlement sector.

Less important perhaps, but equally fundamental, are concerns – chiefly at the federal level - around the growing divide between cosmopolitan, multicultural cities and centres whose ethnic, cultural and religious profiles have not changed for a generation; as well, there are troublesome questions around social cohesion and belonging and what meaning these objectives have in situations (such as in Toronto and Vancouver) where new arrivals are being integrated by hosts, who are themselves immigrants, into communities consisting for the most part of recent arrivals.

A few data points are sufficient to bring out the degree of imbalance between the major metropolitan centres of Toronto, Montreal and Vancouver and smaller urban regions. The data hint at the challenges that await:¹²

- By 2017, for the non-immigrant population, there will be only 75 potential labour market entries for every 100 potential exits; for the visible minority population, there will be 142 potential entrants for every 100 potential exits.
- Between 75 and 80 percent of all newcomers fall into the visible minority category. Only 4 percent of visible minorities are choosing to settle in non-metropolitan regions (urban agglomerations smaller than 100,000 people).
- Some seventy percent of new entrants will be living in Toronto, Montreal or Vancouver by 2031.

Being able to attract and retain newcomers is, arguably, one of the keys to survival for smaller metropolitan and sub-metropolitan centres across Canada. This will not be an easy task judging by past experience. Cities that are new to immigration lack many, if not most, of the services that immigrants depend on. More fundamentally, they lack the extensive institutional infrastructure – notably immigrant service providing agencies – that disburses services in the large immigrant receiving centres.

The lack of local integration capacity is a major hurdle not only for cities and towns but also for federal and provincial governments. Existing settlement and integration policies and programs are ill-adapted to serve small, ethnically diverse and physically dispersed populations. Newcomer volumes are, in many cases, too small for efficient operations and delivery specialization. Instead, there will need to be some combination of greater training of mainstream institutions to address newcomer needs coupled with itinerant and alternative, perhaps electronic, forms of service delivery. These will require sustained investments both in local capacity and in the capacities of settlement organizations in larger centres to export their services. A number of pilots are underway – such as delivering LINC by telephone or over the internet – but they have not yet been assessed. Along with improved local services, there will also need to be a stronger focus on engagement aimed at leveraging support and removing barriers to social and economic participation.

Settlement agencies will almost certainly find themselves in the lead on developing the receptive and integrative capacities that are presently lacking in second and third tier cities. This said, an optimal ‘technology’ for accomplishing the essentials of service delivery and local engagement remains to be invented: the Local Immigration Partnerships program in Ontario can be seen as one of several experiments to design such a technology. The reasons for assigning settlement agencies a central role in smaller cities will be explored below along with suggestions for creating a durable innovation capacity within the settlement sector, operating at a national level.

¹² See footnote 10.

Divergent flows and divergent treatments

Skilled worker migration which has long been a distinguishing feature of Canada's immigration program is undergoing a transformation. So, too, is the conception of what needs to be achieved through settlement programming. The reasons for the first shift have to do with immigrant economic performance, labour market needs and migration processing logistics; the reasons for the second have to do with the realization that the social and economic integration rates of newcomers do not follow identical trajectories. Where the transformations converge is in decisions about services and service eligibility.

The story of labour market immigration is increasingly not one story, but two. The selection system of the future will, at one end, privilege highly skilled, fully fluent, job-ready candidates; at the other end, it will admit low to mid-skilled workers into designated jobs. The middle, where the bulk of current selection fits, will shrink.

There is a growing consensus that Canadian labour markets are unlikely to shift profoundly in their evaluation of immigrants' credentials. In essence, there is little or no return to foreign work experience and employers have shown little inclination, across several decades, to change their valuation of academic degrees and diplomas acquired abroad.¹³ Shifting these preferences is possible – TRIEC is a first rate example of what can be done – but it is expensive on a per case basis. The most likely scenario for changing high end immigration will involve a change in the selection system to reduce or eliminate points for experience while placing considerably more weight on language skills. Mandatory language testing will almost certainly be introduced to ensure that applicants have the requisite language skills for their intended occupation. There is ample econometric evidence to back up these positions.

Another response, one favoured by Australia, will be to rely more heavily on skilled temporary workers and international students, especially business and science students whose educational credentials are not heavily discounted. This scenario is, in fact, already well entrenched and there has been a steady easing in recent years of administrative barriers allowing high-end temporary entrants to convert their status into permanent residency. The number of such conversions has shot up in recent years and will almost certainly grow. A good part of this growth – though this point is contentious – will, however, be fuelled by not by highly skilled entrants but by low and mid-skilled workers. Three factors will account for this phenomenon: the mechanics of CIC's processing system; unmet demand by Canadian firms for low skilled workers; and supply-push as migrants successfully identify new pathways to entry and residence.

¹³ The dire effects of educational discounting have become more pronounced as a result of more immigrants coming to Canada with degrees that are not valued rather than recent changes in how employers value overseas degrees.

The following is a *stylized* explanation of the difficulties experienced by CIC's processing system: The current system contains somewhere between half a million and three-quarters of a million cases in process (cases initiated but not concluded). Considering that the annual intake of (principal applicant) skilled workers into Canada is in the range of 60,000 persons, simple arithmetic indicates that a multi-year backlog has formed. The difficulty created by this backlog is that, notwithstanding the immigration minister's ability to set priorities so that processing responds to current labour market demands, CIC must also process cases that entered the system years earlier, subject to criteria that reflected economic conditions at that time. (The analogy here might be to starlight: what we see when we look at the night sky is light that began its journey eons ago.) The result is a flow of economic migrants only partly reflective of current needs and, thanks to the courts which have prevented CIC from dismissing no-longer relevant applications, a mismatching problem that cannot be resolved.

In the meantime, of course, Canadian labour markets continue to generate jobs that cannot be filled from domestic sources. This is where provincial nominee, student and temporary foreign worker programs come in – to compensate for and to bypass the clogged permanent resident stream in order to meet employer needs.¹⁴ The Canada Experience Class is then used to convert the status of temporary entrants, completing the 'detour' and allowing them to remain in the country.

Processing problems explain only part of the increase in temporary entrants. A more fundamental explanation is provided by the economy itself which is producing large numbers of low to mid-skilled jobs that employers are having difficulty filling because of their location, working conditions or seasonal nature. The result has been an upsurge in demand for temporary foreign worker entrants. This is unlikely to abate any time soon. The mix of work includes jobs in the tourism and service sector, construction, food processing, production jobs related to energy development and seasonal agricultural work.

The fact that migrants are entering as temporary workers – a bureaucratic and legal designation – should not be confused with their real intentions. A significant portion of the temporary foreign workers entering Canada hope to establish themselves permanently. Those hopes are being realized according to CIC data that shows a sharp increase in the number of persons transitioning from temporary to permanent status. The story is also supported, anecdotally, by the settlement agencies interviewed for this study. A further surge in numbers will occur as the recent explosion in temporary worker intake is 'converted' into downstream landings.

¹⁴ This is not to say that student and temporary worker programs exist solely to compensate for problems in the permanent resident stream. The point is that these programs have been adjusted to perform a compensatory function. In regard to provincial nominees, it bears pointing out that the increase in nominees has constrained CIC's ability to clear the backlog. Nominees 'compete' with both ministerial priorities and backlogged flows for scarce processing capacity.

The projected bifurcation of immigrant workers into high and low skilled groups, coupled with the increased use of temporary entry pathways will have a pronounced impact on settlement programs. The shift up-market to more skilled, fully fluent candidates will almost certainly reduce demands by principal applicants for settlement, language and employment services. The needs of their families may also decline though the reductions would not be as pronounced. A completely different picture is likely to emerge for low and mid-skilled workers, though projections in this area are complicated by CIC's current policy of excluding the majority of temporary workers from most forms of settlement support. The rationale is based on the temporary nature of the flows and the presumption that temporary residents do not need *settlement* services. This position is only partially defensible and will almost certainly be amended in light of present realities. These include the growth in temporary numbers; genuine needs related to equity and protection; high conversion rates that legitimize temporary-permanent pathways; community impacts that occur regardless of migrant status; and research evidence that settlement delayed is settlement impaired.

Notwithstanding CIC's policy of denying assistance to temporary entrants (except in very limited circumstances), settlement agencies across the country have been helping workers and their families¹⁵ as well as communities with growing temporary worker populations. The services being offered are supported by federal ministries other than CIC, by provincial and municipal agencies and by the service providers themselves. This said, it seems unlikely that present arrangements will hold up as the number of low and mid-skilled workers continues to grow.

How the growth in low and mid-skilled workers will affect the settlement sector depends on federal and provincial policy reactions. These are hard to predict though it seems clear that the present situation is unstable and some accommodation is needed in the form of additional family-related services as well as an earlier service start date for migrants who are likely to be landed. There is a concern – backed by research – that delayed landings will have an adverse impact on the long-term settlement prospects of temporary entrants resulting in even greater draws on the social support system in the future.

Regardless of where the service clock is set to start, low skilled migrants are likely to experience language and cultural challenges as well as difficulty in navigating the labour market and transitioning out of their initial jobs. Service challenges will also be encountered because a significant proportion of temporary workers reside in areas that lack an extensive immigrant-serving infrastructure or a supportive co-ethnic population. In these circumstances, service providers will be called upon to help receiving communities with little prior experience in welcoming newcomers, especially visible minorities. This will

¹⁵The services include family-related support, legal and rights counselling, and translation assistance. Other agencies, including religious organizations have also been active in providing support.

require extensive contact between immigrant service provider and mainstream organizations.

The final point in this section returns to the projected shift towards highly skilled job-ready immigrants. As noted earlier, such immigrants will not require economic or language services and, to the extent they do, will likely obtain them privately. Despite this, integration concerns remain. The issue is not with economic integration but rather with integration in the social domain. Contrary to earlier assumptions, it has become clear that economic and socio-cultural integration follow different trajectories and that both are needed for full integration and citizenship. How policy will respond to this concern is not yet clear, however, it seems likely that more emphasis will be put on adaptive institutional responses at the community level. In particular, more attention will be paid to welcoming communities and to sites where newcomer and established populations interact. More effort will also be expended on bringing newcomers into mainstream political, cultural and recreational spheres at the same time as cultural barriers to full participation are attacked.

Until the new policy directions are clarified and given more shape, it is not possible to predict their impact on service provider organizations beyond stating that they will be affected. Some inferences regarding the role they might play can be drawn from the experimental bridging initiatives currently underway in Ontario (the Local Immigrant Partnerships Program) or those in Atlantic Canada. This said, the field is still open and creativity will be rewarded suggesting that the settlement sector should figure out what it might contribute in this area and how best to organize itself to promote social innovation. These possibilities should become more evident in subsequent chapters.

New competitors and new capacities

Three factors – sustained high levels of immigration, substantial and rapid increases in settlement funding and government efforts to enhance efficiency and effectiveness and to reach populations that were being missed – have led new players to enter the settlement services industry. A brief discussion of how this may impact settlement agencies follows.

As a result of sustained high levels of immigration in the large metropolitan centres that are the main immigrant destinations – especially Toronto and Vancouver where half the population is foreign born - all organizations end up serving newcomers as a matter of common, everyday practice. To a lesser extent, this also holds for cities that house significant, albeit smaller, populations. It is not unreasonable, in such circumstances, to assume that all institutions will, sooner or later, become sensitized to the needs of a culturally diverse population by virtue of their regular interactions with that population.

Of course, a somewhat more specialized skill set is required to address the needs of recently arrived immigrants but, even here, the sustained nature of recent flows has increased interactions with mainstream agencies and taught them to work more effectively with newcomers on a (limited) range of transactions. The differences between mainstream

service providers and specialized settlement agencies will be discussed in Chapter 4, however, for present purposes, the main point to note is that settlement agencies no longer have a monopoly on expertise in working with newcomers.

The second element of the story concerns the exceptionally sharp increase in settlement expenditures by the federal (CIC) and provincial (using federal funds) governments. The three-fold increase was so rapid that settlement agencies could not expand at the rate needed to absorb the new funds. As well, salaries within the sector rose rapidly which reduced the price advantage and competitiveness of settlement service providers. These factors, coupled with the expertise that mainstream agencies had acquired, provided the openings that allowed new players, including Y's, schools and other institutions, to enter the market.

The third element of the story concerns the intensification of government efforts to improve settlement outcomes by contracting for services with public, quasi-public and commercial organizations that either specialize in particular services or have a unique convening capacity by virtue of where they are situated.¹⁶ This included schools, colleges, libraries and, in some cases, for-profit companies. The recently introduced voucher experiment provides another example of government's dissatisfaction with current service methods and willingness to shake up the status quo.

The reaction by immigrant service providers to new entrants was mixed.¹⁷ Some SPOs and umbrella associations, understandably, viewed the new entrants as threats. They questioned the government's motives for spreading out settlement funding and expressed concern that the trend, if continued, would eventually deprive them of adequate funding. There was resentment that public institutions had been awarded contracts without having to enter into competitive bidding. Questions also arose as to whether the competitors had the expertise to carry out the tasks for which they were funded or whether they were intermediaries, obtaining and acting were on (free) advice from settlement agencies and handing back complicated cases.

Balancing these perceptions were views suggesting that, in some circumstances, the new organizational entrants offered services that newcomers found appealing, convenient and superior to what was being offered by established settlement service providers. An example concerned employment training by community colleges which was preferred by many immigrants. Positive assessments were also offered of the settlement workers in schools initiative and the library program. This said, in nearly all instances, settlement agencies underlined the fact that their own services were more holistic than those offered

¹⁶ Schools and libraries are organizations that 'convene' newcomers and, hence, can be transformed into sites for service delivery. It is worth noting that current arrangements, to an extent, have historical precedents. The policy pendulum has swung back and forth several times.

¹⁷ The issue of competition came up repeatedly during interviews with service providers.

by their ‘competitors’ and better suited to dealing with complex cases and family needs. This point is developed in Chapter 4.

In addition to forcing settlement service providers to compete more vigorously for government funds, the entry of new agencies also heated up the competition for settlement workers. Initially, this was an unequal battle. Wages and working conditions among settlement agencies were poor and the short-term nature of government funding creates constant uncertainty. The entry of competitors from unionized sectors (like schools) produced an immediate outflow of settlement workers to jobs that offered better security, training, benefits and salaries as much as fifty percent higher. The outflow of workers has, since, somewhat stabilized as a result of improved wages and benefits attributable to the increase in settlement funding.

The implications of increased competition, new entrants and new modes of expenditure will likely have a significant effect on the settlement sector. How significant remains to be seen. It will depend on what current ‘experiments’ with vouchers, SWIS and libraries reveal and how the settlement sector reacts. It will also depend on whether anticipated policy directions materialize, especially the shift to high-end, job-ready workers. In the event such shifts take place and the current voucher experiments prove successful, a significant portion of funding for language and employment services could be diverted away from SPOs directly into the hands of skilled principle applicant newcomers in the form of vouchers. Contribution agreements would still be used for language and employment services but would now be focused primarily on meeting the needs of families and clients with ‘special’ requirements. The impact on the settlement sector would depend on how vouchers are used by recipients – in other words, whether they are used to ‘purchase’ services from service provider organizations or from competitor institutions.

There are too many unknowns to predict the result of this hypothetical competition with any degree of confidence. Outcomes would depend on how programs are structured; how agencies react; how services are priced; whether services are bundled; and how immigrants perceive the offerings by the various parties.¹⁸ In a truly open environment, agencies could compete on the basis of both quality and price. This could include offers of extended training; bundling in additional services not covered by the voucher (for example, services for family members) or charging a premium over and above the voucher (Harvard, for example, can charge more for its services); finally, there is the question of whether clients and employers would perceive the different service offerings as equivalent. There seems to be some evidence to suggest that clients would be willing to pay for differentiated services.

While the changes themselves are difficult to predict, what is clear is that the genie has been released from the bottle and settlement agencies must take it seriously. Some adjustments

¹⁸ There would also be regional implications because of different regional propensities to rely on non-service provider organizations.

already underway, such as greater investment in professionalizing the sector through staff training, testing and quality standards, are steps in the right direction and should be continued. But, if this is all that is done, settlement agencies will not be in a position to fend off more fundamental challenges. Change, as noted earlier, creates both opportunities and threats. To advance, the sector, like other 'industries' in similar straits, will need to become more competitive and respond by becoming more specialized, by improving inter-agency cooperation and by rationalizing services, encouraging the merger or withdrawal of weaker, smaller agencies. The sector will also need to innovate. This capacity, in particular, should take advantage of the sector's national reach. Currently, best practice analyses occur primarily within, and not across, provincial or regional jurisdictions.

As settlement agencies strive to become more competitive and to clarify their role, they will need to differentiate themselves from their competitors by focusing on core strengths and trying to understand how these strengths might be deployed to address the critical emerging social, economic and cultural challenges that the study has identified. The next chapter treats these challenges as design parameters and asks what organizational capacities are needed to address them.

CHAPTER 4: MATCHING REQUIRED CAPACITIES TO SECTOR STRENGTHS

Chapter 4 develops three critical ideas. First, it looks at the challenges identified in the previous chapter and extracts the capacities that will be needed to deal with those challenges; second, it offers a reinterpretation of what settlement agencies do to promote integration; and third, it argues that the sector's comparative advantage lies in four essential integrative capacities that *cannot* be replicated by other agencies. These capacities centre on:

- i. Dealing with needs holistically, as opposed to in silos (that is, from a case management, as opposed to service, perspective);
- ii. Focusing on families rather than individuals as the 'unit of analysis';
- iii. Providing a 'place-based' machinery that organizes and directs services to neighbourhoods and promotes 'bridging'; and
- iv. Bringing together services to deal with crises.

The Chapter contends that settlement agencies are *uniquely* positioned, by virtue of their special capacities, to address the challenges that have been forecast for the medium term. This underpins the contention, at the heart of this report, that governments and service provider organizations have a shared interest in strengthening these core capacities. How to effect this transformation is developed in the final chapter on recommendations.

Challenges and essential capacities

While the previous chapter projected the directions in which immigration is heading – or is being pushed - and the implications this will have for settlement and integration, it made only passing reference to the capacities that will be needed to implement new policies and to address difficult emerging problems. This task will now be taken up in earnest. Not surprisingly given the inter-related nature of the changes that are forecast, the required capacities are also closely linked to one another.

Perhaps the most basic requirement to emerge from the forecasts is the capacity to assemble and coordinate a complex array of services, programs and interactions funded by the different levels of government and multiple departments. This can be inferred from the projected federal emphasis on co-management with the provinces; the complexity and intransigence of problems such as social exclusion; and the tools needed to effect a strategic reorientation from short-term settlement to long-term integration.

The capacity to assemble and coordinate public offerings is not simply a matter of gathering programs and arraying them on the shelves of giant, settlement supermarkets for ‘clients’ to browse. The majority of ‘clients’, notwithstanding projected changes to the selection system and the use of tools such as information portals, would find it extraordinarily difficult to make informed decisions about the basket of services they need, the order in which to consume those services and the complex (and different) rules governing eligibility. Nor would they be able to turn to governments for advice. Government ministries know a great deal about their own offerings and the effectiveness of those offerings – they acquire this by monitoring outputs and conducting evaluations – but their knowledge is highly compartmentalized. Ministries know little about services offered by other departments and even less about how those services affect or complement their own programs – say, how public health programs interact with employment measures. This veil becomes increasingly opaque across federal-provincial, federal-municipal and provincial-municipal boundaries.

Governments have long recognized the difficulties they face in regards to policy and program silos. Following the 1995 Program Review (a similar exercise to the recent Strategic Review), a series of Deputy Minister task forces struggled with improving horizontal policy management and devising ‘whole of government’ approaches to regional and local coordination. The concerns then, as now, were with program overlap, conflicting interventions and a search for synergies associated with joint problem solving and collaboration. In response, various solutions were proposed and implemented, among them, ‘one-stop’ or ‘single window’ access (such as Service Canada), integrated management structures, standing committees, and departmental reorganizations. Without question, these are important responses to the asymmetry between problems that do not respect jurisdictional restrictions and services that are bounded by both jurisdiction and expertise; they are not, however, without limitations. It is these limitations that are at the heart of this report and the claim that settlement agencies enjoy a strategic advantage in delivering the services required to address upcoming challenges.

The fundamental constraint on the strategies described above is their top down orientation which is better suited to coordinating policies and plans than to delivering services. This limitation is a function of how governments acquire program knowledge; it also results from accountability regimes that hold officials responsible *only* for the programs they control but not for their coordination with services offered by other departments and other levels of government. The result is that officials generally know little about how their own programs fit with others and even less about how their services might be adapted to messy, real-life circumstances. This knowledge, along with the flexibility and agility to devise ‘solutions’ for clients, resides *exclusively* with settlement agencies; furthermore, it is acquired *tacitly* as a result of the bottom-up, client-focused, problem-solving approach that agencies follow.

Settlement agencies acquire information about policies and programs by working hands-on with clients: Much of the knowledge that is brought to bear in the initial counselling and

mapping discussions (where decisions are made about client needs and service plans) is derived from agency/counsellor experimentation and experience with the flexibility, effectiveness and combinatorial possibilities afforded by different programs. These are precisely the skills that will be needed to address the challenges identified in Chapter 3. New policy directions, harder problems and more partners (a consequence of co-management) will require more complex arrays of services to be assembled for longer durations in circumstances tailored to the needs of clients facing greater obstacles in communities with fewer assets for managing diversity. All parties will be tested. The real challenge, however, will come not at the level of top-down policy integration but, rather, where rubber and road meet, in efforts to achieve practical, on-the-ground service and program integration. It follows that preparations for addressing the medium-term future *must* include measures to strengthen the integrative capacity of the settlement sector. These concerns are elaborated below along with recommendations for federal action to better support the sector's integrative capacity.¹⁹

While the preceding paragraph argues generally that SPOs play an essential role in integrating programs so as to address problems that straddle jurisdictions, an additional argument can be put forward in regard to *federal-municipal* interactions. This argument has two elements: the first concerns the growing importance of municipalities in relation to diversity policy; the second concerns the difficulty that the federal government faces in constructing a dialogue with cities around this theme.

Regionalization and efforts to promote diversity and accommodation in second and third tier cities (including efforts to support francophone communities outside Quebec) now feature in the policy agendas of every province. Furthermore, a great many cities have developed or are in the process of developing diversity plans and special structures – committees or departments – to coordinate newcomer programming and to liaise with ethnic communities. These changes reflect both the nature of the problems confronting public policy as well as the growing consensus that interventions need to be spatially focused. In the area of immigration and diversity, for example, cities are seen as having a particularly important role to play in promoting economic *and* social inclusion, combating social exclusion and fostering civic engagement and belonging. Critical service areas controlled by cities include municipal housing, public health, local schooling, library and recreational facilities, policing and justice services, and public transport.

While there are ample reasons for the federal government to want to work with cities to improve the spatial focus of federal programming, the opportunities for doing so are circumscribed. Cities and towns fall under provincial, not federal, jurisdiction and provinces

¹⁹ Interestingly, the Deputy-Minister task forces also recommended an integrated approach to managing external partnerships and a pooling of resources to support community and regional planning. The recommendations acknowledge the difficulty of responding to external initiatives, but do not clearly articulate the federal interest in supporting these measures.

have been loath to let the federal government deal directly with cities.²⁰ Settlement agencies offer a potential way out of this impasse. They provide a venue – a policy and program table - where all levels of government, including municipalities, can work together to address issues without having to address jurisdiction. This point, it is worth noting, finds support in the federal strategic review in the guise of the subsidiarity principle referred to on page twelve of this report. If the federal government is serious about bringing decisions closer to its citizens, it (along with the other levels of government) should also have an interest in strengthening the integrative capacity of SPOs.

Another essential capacity invoked by the projected challenges in Chapter 3 concerns the ability to devise and manage integrated, multi-dimensional service plans that respond to individual and family needs. This capacity, which focuses on ‘users’ rather than service providers, complements the aforementioned capacity to coordinate services and programs. The claim, expanded below, is that while other organizations (for the most part) offer discrete services, only settlement agencies undertake full assessments and devise complete, extended plans that provide the basis and logic for assembling settlement services to address individual and family needs.

Several interconnected features of the Chapter 3 projections suggest that the individual and family planning capacities vested in settlement agencies will become increasingly salient over the coming decade. First and foremost is the (projected) further bifurcation of labour market entrants leading to an increase in the number of low and mid-skilled workers who, along with their families, will need additional help (including language training); second, is the policy shift to longer-term social integration which, by definition, entails broadening and lengthening support; and, third, is the growing policy interest in promoting diversity in smaller cities and towns. This policy interest will require a stronger emphasis on families since newcomer recruitment and retention depend on the success of the entire family, not just that of the principal applicant.

As was the case previously when it came to combining government services, the *only* institution with the ability to plan and manage multiple, complex interventions on behalf of individual and family clients is the settlement sector. Other organizations do not, and cannot, undertake similar case planning because they lack the requisite knowledge about newcomer needs; because they do not have the community connections that forge trust and elicit client confidence; and, importantly, because their organizational mandates do not extend to service integration and there is little incentive for them to acquire extensive information about services that originate with other agencies. This is true of both public and quasi-public institutions (such as community colleges) and it will certainly be true of any commercial operations that might spring up in response to service vouchers. As noted earlier, such strategies may prove effective in dealing with job-ready, fully fluent applicants,

²⁰ Toronto is an exception though, even there, federal-municipal contact is highly circumscribed.

especially in major population centres; they are unlikely to succeed, however, with the less skilled, less fluent component of the bifurcated labour flows.

Along with a capacity to coordinate multiple interventions and to create complex, extended assistance plans for newcomers and their families, the challenges projected in Chapter 3 suggest the need for a third, equally important capacity: an ability to form bridging connections between newcomers and members of the host society. Settlement agencies play a seminal role in building these connections through their activities on two fronts: their involvement in mediating relations between newcomer communities and mainstream institutions; and their role in funnelling services to communities based on perceived *community* needs.

Ultimately, bridging connections are a matter of individual choice and volition, however, in their formative stage, the appetite for such links must be induced and pathways must be created by establishing formal connections between newcomers, newcomer associations and mainstream institutions. In other words, the formation of bridging social capital requires an institutional strategy for introducing immigrants to public and private *mainstream* organizations. The reverse also applies with mainstream institutions needing to be introduced to diversity.

Typically, new arrivals tend to form strong bonds with members of their own community and with ethno-cultural associations. This reflects both affinity and a lack of access to the broader community and its institutions. Research has shown that such within-group relations – sometimes referred to as bonding social capital – are initially helpful but, if they persist, can result in diminished opportunity and, in extreme cases, isolation. Avoiding persistent ethnic, racial and religious segregation – whether externally imposed or self-inflicted – is among the most important policy concerns forecast for the coming decade.

This concern has several dimensions. At a macro level, as noted in the projections, the ethnic, religious, racial and cultural divide between large metropolitan areas and smaller second and third tier centres is worrisome. So, too, is the possible isolation of immigrant communities within large cities. Research on this point is mixed and suggests that no communities in Canada are ‘institutionally complete’ in the sense that members of those communities do not interact (or do not need to interact) with members of other communities; nevertheless, the degree of separation that has emerged is creating discomfort and evoking a policy response.

Canada’s diversity policy is premised on exchange, not on reproducing the world’s borders within a municipal context. This notion will become even more important as policy shifts from settlement to longer-term integration. Social, economic and, to a degree, cultural integration will require more emphasis on promoting social exchange and inclusion and preventing its opposite, social exclusion. As noted in Chapter 3, social exclusion is the Achilles’ heel of Canada’s immigration program. Failure on this front – meaning the threat of urban ghettos – would fundamentally undermine the immigration program as well as public support for integration measures that are needed to ensure its success.

Because 'it takes two to tango', implementation of a bridging strategy between newcomers and host communities will require the involvement of both mainstream organizations and newcomer communities. The question is 'who will serve as bandleader'? The answer lies in the capacities that are needed to bring the two 'sides' together. Mainstream organizations require information and instruction about the benefits of diversity and how to adapt corporate, organizational and departmental practices to benefit from newcomer talent (or to serve newcomers better); newcomers and newcomer associations, on the other hand, also need information and instruction but, importantly, their assessment of the gains to be obtained from integration – and, consequently, their behaviour - will be heavily influenced by the channels through which the information is received. Newcomers and newcomer associations must be 'persuaded' that interacting with and participating in mainstream institutions (other than purely economic institutions) is essential. This study makes the case that settlement agencies are uniquely equipped – by virtue of their expertise, their links to newcomers and newcomer organizations and, crucially, the trust relations they establish as a result of these connections - to fulfill this bridging role and to convey the integration message. Because of the importance of this point, it has been developed separately in the section immediately below under 'Reinterpreting the work of settlement agencies'.

The role that settlement agencies play in relation to newcomer organizations and mainstream institutions adds a strong spatial dimension to integration.²¹ There is an extensive academic and policy literature that has developed in recent years about the importance of 'place-based' policies. By mediating relations between ethno-specific and religious organizations, on the one hand, and mainstream organizations, on the other, settlement agencies acquire a first-hand appreciation for the challenges and needs that face communities at a systemic, as opposed to individual, level. Together with ethno-specific associations, settlement agencies are able to address these needs through a series of responses that intensify assistance and direct additional resources to the affected communities and neighbourhoods. Settlement agencies also improve the receptivity and performance of mainstream institutions that come into frequent contact with ethno-specific communities; and they participate in, and add weight to, capacity building exercises involving ethno-specific associations. This dual orientation – working with affected communities, on the one hand, and with mainstream institutions and governments, on the other - is unique to the settlement sector.²² Chapter 5 references the need for settlement

²¹ The spatial dimension that settlement agencies bring to integration is related to their physical location. Agencies, typically, have a wide geographic 'reach' that extends beyond their ward or district. Successful agencies are able to channel significant resources into the cities or towns where they are located.

²² It bears pointing out that settlement agencies, typically, recruit and deploy newcomers in positions or tasks that require them to interact with mainstream organizations; conversely, settlement agencies recruit board members, volunteers and front-line staff from the mainstream community. These are direct forms of bridging.

agencies to strengthen their connections to both mainstream and ethno-specific institutions and offers recommendations for supporting these directions.

An important capacity that settlement agencies acquire by virtue of their connections with both community and mainstream organizations, as well as their direct access to volunteers, is their ability to react quickly to crises, organizing reception arrangements and emergency services on extremely short notice. This capacity – often conducted in partnership with governments – is not singled out in the projections; nevertheless, it constitutes an essential and enduring feature of Canada’s overall immigration program, most recently coming into play in relation to the Haitian earthquake victims.

The final argument in this section concerning the importance of investing in the special capacities of settlement agencies does not arise from the projections per se but, rather, from overarching concerns about expertise and leadership in respect of integration. Given the technical and jurisdictional complexity of managing integration, it is essential to have a common strategic platform that can inform the directions and actions of the many stakeholders. Settlement agencies have an important role to play in contributing to the construction of this platform by virtue of their unique vantage point. Ideas for strengthening the contribution of settlement agencies and improving access to their knowledge are presented in the following chapter.

Reinterpreting the work of settlement agencies

Money and metrics have produced a stunted, partial understanding within government of what the settlement sector does and is. Agencies are seen by government as contractors and their value is equated with the services they deliver. All other activities are treated as overhead. In this construction, successful settlement outcomes are routinely attributed to the quality of government services and the volume of government spending.

These are dangerous ideas if not carefully circumscribed. In particular, they risk creating the perception that finding lower cost alternatives to contracting with settlement agencies – by channelling delivery through commercial enterprises or public institutions – is *always* in the public interest. Why this is not so is the focus of this section. Great care must be taken to avoid damaging the settlement sector while pursuing otherwise laudable public policy objectives. Rather than viewing settlement agencies as vessels for carrying government services, they need to be seen as the rising tide that lifts all ships.

This section identifies four distinct contributions, beyond service delivery, that settlement agencies make to newcomer integration and welcoming communities. The contributions result from: (i) gains in efficiency and effectiveness due to service integration; (ii) additions to social capital and an enhanced civic capacity to mediate relations between mainstream institutions and immigrant communities; (iii) an enhanced capacity by mainstream institutions to accommodate cultural diversity; and (iv) an enhanced capacity by agencies to

provide advice and feedback, at a macro level, to governments on matters of policy and program design.

The first part of this chapter elaborated on the ability of settlement agencies to devise integrated individual, family and community plans based on need and, in response to these assessments, to combine federal, provincial and municipal services. What was not made clear, however, is how extensive these services are.

Few agencies, and certainly none of the large service providers, rely exclusively on one, or even two, government patrons. In the course of the interviews and workshops, it became apparent that a majority of SPOs, even in small centres, draw their support from, and deliver services on behalf of, a half a dozen federal departments, numerous provincial agencies, municipalities and organizations like United Ways and Community Foundations. The main federal clients included Citizenship and Immigration Canada (CIC), Human Resources and Skills Development, the Department of Canadian Heritage, Canada Mortgage and Housing, Agriculture and Agri-Food Canada, as well as regional development agencies. Provincially, the list included the lead immigration ministry as well as ministries of advanced education, labour and economic development, social services, and health. Municipally contracted services were generally fairly modest but increasing in frequency. In exceptional instances, major service providers reported that CIC accounted for as little as a third of their total revenue stream, though generally the proportion was far higher and well above fifty percent.²³

A number of inferences can be drawn from the array of services managed by settlement service providers. The first and most obvious is that settlement agencies play a major role in ensuring efficient and effective program delivery. Without the interventions by SPOs, service delivery would be erratic and the ability of public institutions to deliver their mandates would be compromised. This speaks to the necessity of service integration. The second point is that the 'job' of accessing and integrating services is far too complex to be left exclusively to newcomers who are not fluent in English or French, are unaware of available services and are overwhelmed by the immediate and pressing demands of settlement. The job also falls outside the competency of government. With the exception of Quebec (and even in Quebec settlement agencies play an important coordinating role), governments do not play a major role in coordinating services for clients. The only available institutional choice with the capacity to integrate services is the settlement sector.

Reinforcing this position are two additional points: first (at the risk of repetition) that the essential expertise must be acquired tacitly through hands-on counselling and enrolling immigrants in services, meaning it cannot be easily transferred; second, that shifting large blocks of service delivery to commercial ventures or to non-immigrant agencies risks extinguishing this tacit expertise and, thus, losing the gains in efficiency and effectiveness

²³ The figure applies to regions where the federal government is primarily responsible for settlement services or where co-management arrangements are in place.

produced by coordination. It also risks interfering with the ability of settlement agencies to generate social capital in the form of trust, an important asset for managing intercultural and institutional relations. Unlike other assets, trust cannot be readily transferred between individuals and agencies; nor can it be increased suddenly through last minute efforts and exhortations (though it can be lost in a flash). Instead, trust has to be nurtured through regular contact and demonstrations of community service.

In practice, trust is acquired in several ways: through the provision of settlement and other services to members of newcomer communities; through working with and helping ethno-specific community *organizations* (as distinct from individuals); and through efforts to mediate between mainstream institutions and ethnic, racial and religious communities. Of these modes, only the first (the provision of services) is directly financed by government. The latter two are not supported and do not figure in the usual government calculus of settlement agency contributions and assets. This is an important oversight. Whether viewed as an externality or as a form of leverage, government metrics need to be adjusted to recognize the value of such associations. Astronomers seeking an explanation for the force that holds the universe together postulate the existence of dark matter, unseen but essential; in the case of settlement, the dark, unseen matter gluing communities together is the network of interconnections involving settlement agencies, notably the extensive, voluntary participation of senior agency staff and board members in mainstream advisory structures - committees, councils, boards and task forces. Staff and board members are also active in providing assistance to ethno-cultural groups and other newcomer organisms.

The number of connective nodes reported by workshop and interview participants was impressive. A sample of settlement agency heads, from across the country, reported an average monthly investment of close to 35 hours, mostly after work and in evenings. The reported connections were to mainstream agencies operating in the areas of education and schooling, physical and mental health, housing and homelessness, justice and policing, and employment. Connections were also reported to equity and rights organizations, anti-racism groups, ethno-cultural associations, and to groups advocating on behalf of multiculturalism, aboriginal concerns and refugee issues. At the community and municipal level, SPOs were active in efforts to promote local development, in diversity planning and in capacity building. Agency heads also reported extensive involvement in provincial and municipal diversity advisory bodies, including membership on mayors' committees and taskforces. Lastly, agency heads reported frequent public speaking engagements and the production of articles, columns and broadcasts for publication in both mainstream and ethnic media.

The connections reported by agency heads contribute directly and in vital ways to both newcomer integration and community receptiveness. The mechanism by which this occurs is trust, a by-product of agency involvement and contact. There is a considerable body of research that correlates trust with both civic engagement and a sense of belonging, important policy goals in their own right. But trust also has functional value in helping to mediate intercultural relations. Among the examples provided by settlement agencies is

their role in policing. Policing is a frequent source of tension between newcomer youth and police services. To manage these tensions, police forces have created advisory bodies and local service providing agencies report playing key roles in these structures. When provocative incidents occur - an arrest or injury – the advisory bodies are called upon to establish and mediate the discussion between the police and the affected community, often represented by ethno-cultural associations with whom the service providers (but not the police) have established relations. Trust is the critical lubricant for reducing temperatures and converting tensions into opportunities for mutual learning.

The expertise that settlement agencies acquire through mediating community-institutional relations and delivering immigrant services also equips them to provide advice and training on diversity management to mainstream commercial and not for profit organizations faced with the need to sell product, extend services, hire newcomers and create a more harmonious and productive workplace. Among the services offered by settlement agencies are inter-cultural sensitivity training, talent recognition programs and advice on adapting programs and practices to a diverse customer, employee and client base.

Notwithstanding the importance of community-institutional investments, financial support for these interventions has been inconsistent. Mostly, advice and training have been provided without charge, however, agencies are becoming more adept at marketing their expertise, generally to government ministries to support the training of third parties. To cite one example, in New Brunswick, Status of Women Canada has funded a settlement organization to help several women's projects adapt their programs to immigrant women. Similar examples can be cited by most major agencies.

The final example of how settlement agencies contribute to integration outside their contracted service delivery function is to be found in their advisory role to government. This extends the previous example from an operational context to a macro level. As noted in the discussion of organizational membership, many agency heads cited involvement in federal, provincial and municipal advisory bodies. The counsel they provide finds its way into policy development, program design and operational planning. Proof of its value can be found in the fact that *all* provinces *and* the federal government (as well as many cities) operate consultative structures on which settlement agencies are represented. Federal and provincial officials interviewed for this project reported that settlement agencies offered an important and valuable perspective.

Strategic advantage of settlement agencies

This section repeats and formalizes arguments that have been made above. Its purpose is to facilitate the transition to the next chapter which examines the constraints under which settlement agencies labour and from which they need relief. It also provides the scaffolding on which the recommendations in the final chapter are hung.

Settlement agencies, by virtue of their expertise and lower costs, have long held an across-the-board advantage over other organizations in delivering services to immigrants. This advantage now appears to be eroding as a result of sector growth (which has created more opportunities for entry), rising salaries, anticipated policy changes to attract more sophisticated and self-sufficient entrants, and the gradual acquisition of expertise by mainstream institutions that, as a matter of necessity or business planning, have begun to enter the settlement field. The projected expansion in the use of vouchers will accelerate these trends, especially in areas such as the provision of language training and employment services.

The pattern of initial founder's advantage gradually disappearing as new competitors enter the arena has been repeated in virtually all sectors and all industries. Advantages based solely on early positioning are difficult to sustain. Over the long-term, advantages are durable only if based on strategic factors; that is, on attributes that competitors find difficult to emulate or acquire and on innovations that reinforce the strategic advantages. It would appear that the settlement sector is now at the stage where it needs to clarify what its strategic strengths are, to reorient itself accordingly and to shore up its fundamental advantages through innovation. These decisions and the strategic choices they entail will require discipline and, inevitably, a certain amount of pain. Nevertheless, there are strong grounds for optimism. Settlement agencies have shown themselves to be entrepreneurial, resourceful and resilient. They are also the sole proprietors of the skill set that will be needed to address tomorrow's challenges.

The central contention of this study – discussed above and formalized in this section - is that the settlement sector enjoys an unassailable strategic advantage over other sectors and other agencies in responding to the policy and practical challenges that are projected ahead for immigration and integration. This strategic advantage arises for two reasons: First, because of the overwhelming match-up between the expertise that agencies possess and projected challenges, coupled with the fact that the acquisition of the requisite expertise is integral to, and cannot be separated from, settlement agency operations; second, because settlement agencies serve a dual function, not only delivering services aimed at promoting integration but also implicating themselves in their receptivity, mediating the inter-group and community-institutional relations that the services are intended to promote. These points are briefly elaborated below:

Sector organization

Settlement agencies employ a bottom-up, client-focused approach to service delivery and service integration. Agency interventions are focused on not only the individual but also on the family unit and the neighbourhood. This orientation endows settlement agencies with distinct capacities not present in other organizations:

- ❖ A capacity to adapt and to integrate the numerous, complex services proffered by atomistic service providers based on holistic assessments of what clients require over the settlement-integration continuum.

- ❖ A capacity to organize services and interventions on the basis of assessed, overall *family* needs as opposed to dealing with family members in disconnected silos.
- ❖ A capacity to provide a 'place-based' machinery that focuses services and institutional interventions on neighbourhoods and cultural communities;
- ❖ A capacity to rapidly bring together volunteers and services to respond to unanticipated, short-term crises – such as the arrival of refugees following a natural (or man-made) disaster.²⁴

Mediating inter-group and community-institutional relations

In addition to delivering discrete services, settlement agencies - through the actions of their executives, senior managers and board members - are involved in mediating relations between newcomer communities and established, mainstream institutions. They do this by participating in councils, committees, taskforces and other structural machinery for providing advice and achieving institutional change. The reasons for their involvement have to do with the fundamental orientations of settlement agencies as well as the personal orientations of the workers and volunteers who populate the sector, many of them born abroad, empathetic to the plight of newcomers and committed to the ideal of a multicultural or pluralistic Canada. Beyond the personal, the family and neighbourhood orientation of settlement agencies naturally induces interventions on behalf of communities. The salient point is that without settlement agencies, many of the institutional and community interventions that account for Canada's success in the area of integration would either vanish or be highly compromised.

Trust and expertise are essential components of the settlement agency toolkit. This trust is a by-product of the continual efforts by settlement agencies to bridge the gap between newcomer communities and mainstream institutions. These efforts create a virtuous (self-reinforcing) cycle of institutional and community transformation. Trust is an essential capacity for managing inter-group conflict, for producing mutual adaptation and for creating a sense of belonging. Other agencies are unable to elicit the same degree of trust among newcomer communities because they are not active at the interface between immigrants and mainstream institutions. An additional factor (though not necessarily a strategic one because it can be replicated) is that SPOs disproportionately employ immigrants thus reinforcing their bond to newcomer communities.

The critical factor guarding the specialized ability of settlement agencies to mobilize services and institutions in support of integration is *knowledge* – the kind of knowledge that can only be acquired tacitly through actions and experimentation. The reasons for this have to do with complexity, ambiguity, trust and judgement: combining complex services to

²⁴ Many of the organizations involved in refugee assistance are, or were, religiously-rooted.

address complex issues is inherently difficult; program rules are ambiguous and open to interpretation; trust is essential for persuading program managers to provide assistance and to be flexible; and judgement is essential for maintaining vital relations and not exceeding critical audit and program integrity boundaries.

The study proposes that settlement agencies focus on their core strengths, concentrating their interventions on issues and populations that are most closely aligned with and most dependent on the capacities that distinguish them from other agencies. A corollary is that services not aligned with these capacities will be increasingly shared with other organizations. This may be regrettable from the standpoint of individual agencies but, for the sector as a whole, there is no discernible advantage – and, indeed, there may be a cost - to defending positions that are not central to its future.

In order to support this transformation, the study argues that settlement agencies will need to buttress certain capacities that are presently underdeveloped. Especially important in this regard is the introspective capacity of agencies to acquire knowledge as well as the sector's capacity to mobilize that knowledge in pursuit of innovation. Governments have a shared interest, alongside settlement agencies, in strengthening these core capacities facilitating the sector's ability to think and innovate. No other institution in Canada is as well equipped to support government policy directions and to address the challenges that lie ahead. Chapter 5 examines the factors that are preventing the settlement sector from doing what it does best: helping to integrate and welcome newcomers. The Chapter recommends changes that will strengthen the sector and nourish social innovation, an area that many observers feel is lagging in Canada.

CHAPTER 5: SECTOR TRANSFORMATION: STRATEGIES FOR CHANGE AND INNOVATION

The final chapter of this report identifies five broad areas in which changes are needed to bolster the strategic advantages of the settlement sector. All of these changes require a degree of federal or provincial compliance as well as collaboration between governments and settlement agencies. This should not prove an impermeable barrier providing all parties focus on the ultimate goal of improving integration outcomes for newcomers and obtaining a better 'return' on Canada's prodigious investment in settlement.

The ideas offered in this study for optimizing the activities of the settlement sector are designed to support the following straightforward argument: There are things that settlement agencies do better than any other institution in regards to integration. They do this by virtue of who they are and how they operate. This constitutes their strategic advantage. Getting settlement and integration right entails aligning agency activities with this strategic advantage and ensuring that ancillary systems, be they government or agency 'owned', are configured to support this orientation.

The recommendations set out below are designed to function as a package and to support each other. They cannot be easily dissembled without undermining the thrust of the paper. For this reason, the list of recommendations is deliberately short: transformative change does not require a laundry list. It requires focus. Furthermore, because the changes require agreement among multiple parties, it does not make sense to be overly prescriptive. The most effective and durable changes are those that evolve collaboratively. This is especially so because the concept of strategic advantage, as used in this report, is based not on competition but on all parties recognizing and respecting each other's strengths. What better place to start than by working together to reshape the future. The spirit in which the recommendations are offered is that settlement agencies and governments are partners, not only in delivery, but in seeking the best possible outcomes for newcomers and for Canada as a whole.

1. INNOVATION: MOBILIZING KNOWLEDGE FOR 'BEST PRACTICES' AND 'BEST POLICIES'

Innovation constitutes an essential response to the profound challenges facing the settlement sector. Meeting these challenges will require both governments and community organizations to introduce new approaches and to forge new partnerships. One of the more

important questions this raises is: ‘What process will be followed in establishing new directions and new practices?’ Equally important for service provider organizations is whether they have the capacity, individually and as a sector, to participate in making these critical decisions. Without this capacity – an ability to analyze issues, to evaluate interventions and to synthesize evaluations into best practice recommendations that inform agency behaviour and sector-wide strategic directions – settlement agencies will, inevitably, be relegated to the role of passive observers and stoop labour, acting exclusively at government’s behest.

Governments at all levels have recognized the need for greater innovation in immigration policy and programs; hence measures such as the Modernization Initiative. To support innovation, a great deal of energy has been invested in extensive reviews, analyses and evaluations. Settlement agencies will need to follow suit if their views are to carry serious weight as the anticipated reforms unfold. This will require the agencies, both individually and collectively, to equip themselves with capacities that are currently in short supply. It will also require the sector as a whole to create new institutions for mobilizing and sharing front-line knowledge.

Settlement agencies are weak in two crucial, knowledge-related capacities: The first involves the ability of individual agencies to reflect on their actions, analyzing internal practices and forming opinions as to their strengths and weaknesses; the second involves an aggregating capacity - the ability of agencies, *as a national collective*, to analyze experiences and to extract and share lessons amongst themselves in regard to best practices and policies.

The reasons for these weaknesses have to do with the manner in which governments, across the country, finance settlement.²⁵ For the most part, agencies are funded on a fee for service basis, negotiating their allocations according to the type and volume of the services they deliver. These fee structures make some allowance for administrative overhead, but they provide little room for higher- order corporate functions such as human resource planning, business forecasting, partnership development, strategic planning and research. Such an arrangement was barely tenable even before the vast expansion of the settlement sector. It makes even less sense now that settlement revenues have tripled. The 2006 expansion was

Qualifications are in order: In Quebec, the province itself delivers the bulk of services; hence, the ministry conducts research to inform its actions. In British Columbia, the provincial system of tenders and competitive bids has, so far, left room for analytic undertakings by agencies. As well, the link between services and fees is looser in some ministries than others, allowing agencies who secure support from these ministries room to manoeuvre analytically.

²⁵ This point will be dealt with more extensively in the recommendations dealing with metrics and accountability.

akin to placing an athlete on steroids: The body grew enormously but the ‘brain’ stayed relatively small – not an optimal arrangement for innovation.

To carry out knowledge-related activities, settlement agencies, typically, rely on special, one-off grants cobbled together from sources such as United Ways, Social Planning Councils and community foundations. Failing this, analytic activities are undertaken as time and financing permit, generally by agency executive heads and senior staff. Either way, the situation is problematic. Agency heads consistently identified sporadic and under-funded support for knowledge development as one of their biggest corporate problems. Executive directors interviewed for this study indicated that corporate functions should be supported at roughly ten percent of overall program budgets. This number would appear to be high (it likely includes administrative functions which are already supported); nevertheless, the salient point is that settlement organizations universally judged corporate analytic activities to be important and significantly under-resourced, particularly in smaller organizations.

What is true at the agency level is also true at the sector level. While a certain amount of analysis is undertaken by provincial umbrella organizations, by some of the larger settlement agencies and by organizations such as the Canadian Council for Refugees, much of this work is focused on advocacy rather than delivery and does not, generally, step outside regional or provincial boundaries. Furthermore, the analysis is not undertaken systematically with a view to pressing home the strategic advantage enjoyed by settlement agencies.

Similar shortcomings apply to academically-led projects such as Metropolis. While there has been a great deal of excellent research examining integration, the focus has tended to be on policy rather than practice. Analysis of the delivery system and of the work undertaken by settlement agencies has focused on local systems and has not, for the most part, provided a national, comparative perspective on best practices at the level of detail and expertise required by service providers. In part, this reflects the manner in which settlement agencies are integrated into the academic centres at a governance level and as investigators or research partners. Alternative configurations might address some of these issues but Metropolis has been sunset and will not likely be renewed when its current phase expires²⁶.

As explained earlier, the principal strategic advantage of the settlement sector lies in the tacit, hands-on experience that agencies derive by solving integration problems for their clients. However, unless the sector finds a way to capture and analyze this experience, the creativity, entrepreneurship and innovation that settlement agencies exhibit individually – and which came across strongly in the interviews and workshops – cannot be invested in

²⁶ A relatively new research project in Ontario, the Welcoming Communities Initiative, is experimenting with a governance and organizational structure that enlists local academic resources to serve as the research arm of local planning committees headed by cities and settlement agencies.

advancing the collective.²⁷ This retards learning and undermines the ability of settlement agencies, as a group, to compete with other institutions that are entering the settlement 'marketplace'. This bodes ill for the future. If immigrant service providers are to maintain their independence and control their future, they will need to sharply improve the sector's capacity to mobilize and share information nationally, to think strategically, and to act coherently. This importance of this capacity was highlighted in the recent Standing Committee report on settlement.

It is not only settlement agencies that are hampered by their inability to exploit their position as knowledge producers. Governments, too, are hurt by this impoverishment. Individual ministries, as noted earlier, lack information about how their services combine with those of other ministries and governments, thus limiting their ability to develop a comprehensive, effective and efficient integration strategy. Ministries are also impeded in their policy assessment efforts by the fact that they do not enjoy strong trust relations with newcomers. Here, too, settlement agencies possess a strategic edge by virtue of their community bridging activities. The upshot is that the capacity of governments to innovate is inextricably tied to the innovation capacity of settlement agencies. A weak settlement sector equals a dull public sector.

The point to which these arguments drive is that governments have a strong incentive to invest both in the knowledge capacity of individual settlement agencies (the knowledge producers) as well as the capacity of a sector-level institution endowed with an ability to analyze, evaluate and disseminate this information. Furthermore, governments would have a strong incentive to participate in systematic knowledge exchanges at the sector level. Such an arrangement would provide governments with new insights into policies and programs. It would also facilitate the development of a common strategic platform that would inform policy development and partnering decisions by all integration stakeholders. The present forum for such exchanges – the Settlement and Integration Joint Policy and Program Council (SIJPPC) – is dominated by Citizenship and Immigration Canada and lacks independence. This undermines its effectiveness and leads settlement agencies to adopt a reactive posture. Governments and the settlement sector have a shared interest in developing an arm's length body that is able to synthesize knowledge from different sources and offer dispassionate advice. Specific recommendations follow:

²⁷ This point is also tied to funding. The current system introduces competition, leading agencies to 'hoard' ideas rather than share them.

A recurrent theme in the interviews with agency heads was a desire to elevate government-agency interactions from conversations about contribution mechanics to discussions about ‘things that matter’ – perceived impacts, challenges and ideas for resolving problems. Agencies would like access to the policy community but are, for the most part, restricted to conversations about finance and procedures.

Recommendation 1

The settlement sector should strike a task force to develop proposals for a sector-led, pan-Canadian institution comprised of settlement agencies and university-based researchers that would analyze and disseminate best practice information. The formation of such a body is seen as crucial for promoting social innovation, capitalizing on the sector’s entrepreneurial abilities, mobilizing tacit knowledge and supporting a partnership with government that is based on mutual respect and expertise. It would also strengthen the identity of the sector and provide a strong signal that its contributions are valued. The task force would be responsible for costing its proposals.

The new, pan-Canadian body – part clearing house and part think tank – should be ‘wholly owned’ by the settlement sector and endowed with a capacity to capture, document and evaluate promising agency practices; the body should also have the capacity to analyze the impact of government policy and program decisions on the ability of settlement agencies to serve individual, family and community clients.

The task force should be asked to propose an initial set of high profile, best practice studies in order to demonstrate ‘proof of concept’ and value-for-money. Candidates might include a detailed examination of how settlement agencies combine programs that are known to interact (for example, health and employment); or a comparison of initial needs assessment protocols used by different agencies across the country.

The task force should be asked to examine how the proposed institution might build on the capacities of provincial and regional associations with a view to lowering costs, ensuring broad representation and helping to achieve critical analytic mass. The agency should have both an ‘initiating’ and a ‘responsive’ orientation: The ‘initiating’ orientation would come into play when tasking agencies to collect information; the ‘responsive’ orientation would come into play when responding to sector requests, for example, developing advice on CIC’s planned use of outcome measures or proposing metrics for welcoming communities programs. The task force should also assess the utility of other potential functions: the new institution could serve as clearing house for individual agency studies; it could develop a roster of academic settlement experts; and it could build additional analytic capacity by creating intellectual relationships and exchanges with institutions outside the sector. The overarching goal would be to expand the analytic capacities of the settlement sector so it could come to the table with governments as an equal and not as a passive supplicant.

Recommendation 2

The settlement sector should approach both federal and provincial governments with a proposal to jointly develop a new, collaborative, arm’s length knowledge institution. The proposed body would combine the analytic strengths of governments, academic researchers and the community sector. (This recommendation is contingent on the implementation of the sector-led, analytic body described in Recommendation 1.)

The proposed arm's length knowledge institution would be 'virtual' in that its analytic capacity would be physically distributed with research teams coming together at fixed intervals. The institution would be managed by a secretariat made up of representatives from the various parties. By operating at arm's length, the institution's policy and practice analysis would not be tainted by 'ownership' and would enjoy a higher degree of credibility with stakeholders, with the media and with the public at large.

The institution would accept references from governments and from the settlement sector and would undertake studies by creating teams of experts drawn from the various sectors and managed under a matrix arrangement designed to elicit both academic and tacit knowledge. Various models aimed at creating academic, community and government partnerships have been devised in recent years and several interesting approaches are available for consideration. The new institution could operate alongside CIC's SIJPPC or it could replace it entirely.²⁸

In addition to accepting references from participants, the new arm's length institution could undertake special studies such as those conducted under the European Union's 'open co-ordination' system to assess social inclusion and anti-poverty programs. The essence of these studies involves using teams of experts to assess and report on specific approaches by member countries. What makes this form of organization interesting for pan-Canadian work is that it was developed specifically to coordinate policy development and service delivery under asymmetric social, economic and institutional conditions across different jurisdictions. Moreover, the approach was aimed squarely at sharing best practices and using best practice knowledge to drive collaboration. The system has been credited with promoting closer, more professional relations between government agencies and the community sector, especially at the local level.

It is important to underline that there exists a shared interest by *all* parties in ensuring *both* objectivity and the perception of objectivity - hence, the importance of institutional independence. Without this, advice and analysis tend to be discounted in the manner of drug studies funded by pharmaceutical companies.

²⁸ As noted earlier, Metropolis will most likely not be renewed once its current phase expires. Other comparative analytic vehicles such as settlement.org and the Welcoming Communities Initiative are based in Ontario and cannot, as structured, provide a national comparative perspective. Similar critiques apply to the Knowledge and Development Exchange initiative under B.C.'s Welcoming Communities program and organizations such as Newfoundland's Coordinating Committee on Newcomer Integration.

2. SYSTEM INTEGRITY: CONFIGURING METRICS AND FINANCIAL ACCOUNTABILITY FOR BETTER OUTCOMES

The question of how to ensure financial accountability and related questions regarding program metrics are among the most important and contentious issues facing the settlement sector, particularly in provinces where the federal government retains control over settlement. Financial exchanges dominate the relationship between the federal government and service provider organizations, a function of the highly interventionist system operated by Citizenship and Immigration Canada and the fact that CIC's policy capacity is located in Ottawa, inaccessible to most settlement agencies.

Both federal and provincial governments find it challenging to manage their relations with the settlement sector in a way that ensures accountability for public funds without overburdening agencies with reporting requirements to the point where the protections afforded by fiduciary control are outweighed by the cost of data collection and the stifling effects of excessive oversight on innovation. Considerable sensitivity on this point was revealed during the interviews and workshops. Agencies generally felt overregulated, however, executives across the country were unanimous in singling out the contribution agreements and controls used by Citizenship and Immigration Canada as a particular problem. Their criticisms focused on the enormous amount of time absorbed by data collection and reporting; on frequent demands to resubmit information; on requests to justify trivial expenditures; on the lack of spending flexibility; and on difficulty of using CIC's iCAMS data system and the fact that it does not address the analytic and management needs of the agencies that feed it.

In addition to the idiosyncrasies associated with particular funders, agency heads noted the difficulties of having to report on multiple programs, each requiring marginally different information in proprietary formats. Estimates of the time spent by front line officers in gathering data and producing fiduciary and program reports were about ten percent while program managers invested approximately twenty percent of their time in reporting.²⁹

Apart from the time consumed by reporting, agencies also complained about the restrictive nature of various funding regimes. Again, CIC's fee-for-service contributions system came in for the heaviest criticism. While CIC makes some allowance for administrative overhead, corporate activities, including strategic and human resource planning and research, are not supported. This forces agencies to fund essential corporate functions by siphoning off small

²⁹ Weekly, monthly, quarterly and annual roll-up reports are required in connection with agency plans, activities, expenditures, variances, funding applications, renewals and so forth. Expenditures must be supported by detailed receipts and there is little flexibility. As well, individual client data must be recorded electronically. This data is not available to agencies for program management purposes.

amounts from multiple projects. Somewhat greater flexibility is provided by regimes such as those used in British Columbia where the tendering process has engendered large consortiums that collaborate and ensure that their bids make room for analytic activities. The downside of such regimes is their episodic nature and their epic proportions. RFPs take on an existential tone and it is almost impossible for new agencies to gain a foothold without the 'blessing' of the established service providers. At some point, such a regime becomes indistinguishable from core funding.

The system of financing agencies on a fee-for-service basis related to the number of clients served introduces several distortions. Among these is the incentive for agencies to hoard information and clients. The metrics of a fee-for-service system are not conducive to promoting referrals and work against overall system optimization. An analogy might be if teams in the National Hockey League were to reward players solely on the basis of goals, ignoring assists. The result would be a disinclination to pass. Some individuals would improve their output of goals, however, team and league performance would suffer.

A more important distortion arises from the fact that only direct services are measured and funded while indirect services, notably the work associated with social bridging, are generally not measured and receive no financial backing. This includes the vital role that agency directors and senior executives play in building relations between mainstream and ethno-specific communities. The fact that these activities are not funded leads to under-investment: agencies are reluctant to invest in actions where they cannot themselves capture the benefits that ensue. As well, governments have little influence over such activities.

Recently, governments have begun to seriously consider the use of outcome measures to supplement or replace the current array of output indicators. This shift, from outputs to outcomes, is integral to CIC's Modernization Initiative; as well, both Quebec and British Columbia have introduced outcome measures into their community programs. Agencies support these efforts as consistent with their own (qualitative) approaches to assessing service impacts.

Notwithstanding the general sentiment in favour of focusing on outcomes, measurement and conceptual problems remain: what to measure, what indicators to use and how to attribute outcomes to specific interventions all pose formidable challenges. This suggests that outcome measures will not immediately replace output metrics, thus posing the risk of an additional data collection burden. Models do exist, both in Canada and abroad, for alternative methods to assess complex programs deployed in variable circumstances. The recommendations below offer suggestions for how the settlement sector might participate in the development new metrics and new methods of assessment.

Recommendation 3

The settlement sector should urge Citizenship and Immigration Canada to immediately implement the recommendations of the Blue Ribbon Panel on accountability and financial management. These were released in 2007 and many departments have already moved ahead on this important initiative. The sector should also insist that it be consulted on the proposed amendments and that the consultation be organized and managed by the sector itself. As part of the Blue Ribbon review, CIC should reassess iCAMS in order to reduce the data collection burden. In addition, CIC should, in consultation with the settlement sector, examine ways in which iCAMS could support not only policy and administrative decisions by government, but also management and analysis by settlement agencies and the settlement sector. This is an essential step towards ensuring data quality.

Recommendation 4

In collaboration with Citizenship and Immigration Canada, the settlement sector should undertake a study of how best to finance core intellectual activities including analysis, best practice research, human resource and strategic planning, and partnering decisions.

Recommendation 5

A joint settlement sector-government task group should be formed to examine how best to support activities aimed at building relations between newcomer and mainstream communities. The current system results in underinvestment and suboptimal performance. With this in mind, the task force should examine the advantages and downsides (as well as the potential) of charging public and private entities for advisory services that are currently offered free of charge. As noted in the report, there are precedents for such arrangements. This move would support the sector's transition to a knowledge-based industry.

To support this transition, the task group should also be asked to recommend community-level outcome measures. Ideally, the research to support these recommendations would be undertaken by the knowledge institutions described in Recommendations 1 and 2. In the event that such institutions are delayed or rejected, the task group would undertake a standalone study for which consulting resources would be required.

3. STRENGTHENING THE FRONT- END: A STRATEGIC INVESTMENT IN BETTER SERVICES AND A MORE EFFICIENT SECTOR

The special strength of the settlement sector lies in its ability to conduct holistic assessments of individual and family needs and to assemble services from multiple sources. Strengthening the sector's front-end assessment capacity will reinforce the strategic advantage enjoyed by settlement agencies in regard to identifying and addressing problems.

There is widespread agreement – both within government and among settlement service providers – that the quality of the initial needs assessment plays an important role in the successful settlement of newcomers. Equally important, especially for clients who experience multiple challenges, is a focus on the family as 'the unit of analysis'. Despite

this consensus, there does not appear to have been a systematic attempt either by the settlement sector or by governments to examine and evaluate existing assessment practices.

Beyond its instrumental use for planning services, the initial needs assessment process has important distributive consequences for both governments and service providers. As noted in recommendations on financial accountability, agencies have an interest in 'hoarding' clients in order to protect fiscal allocations. This tendency suppresses inter-agency referrals and interferes with two important economic processes: specialization by agencies in particular services and sector-level rationalization whereby smaller and weaker agencies merge, are absorbed, or cede functions to larger, more efficient organizations.

Recommendation 6

The settlement sector should undertake a national, comparative study of how different agencies conduct their initial, front-end assessment of individual and family needs. Special attention should be paid to 'one-stop' service centres such as those in the Atlantic Provinces. International examples drawn from countries such as Portugal should also be assessed. The study would:

- Analyze and evaluate the methods used by different organizations to assess newcomer needs with a view to developing best practice recommendations.
- Provide advice on the appropriate scope of the initial needs assessment, recognizing the extensive range of services to which agencies have gained access on behalf of their clients.
- Recommend standard templates for recording information during the initial interview and subsequent follow-ups (to permit aggregation).
- Recommend a standard, minimum set of data to be entered into a common database (managed with government) used for analyzing best practice program interventions (alone or in combination with other services) and evaluating client outcomes.

Recommendation 7

The settlement sector should undertake an internal study of the benefits to be derived from creating a shared 'machinery' for conducting initial needs assessments and allocating clients among service providers. The terms of reference for the study would require the task group to provide advice on the following concerns:

- Specialization, while generally a virtue, has its limits. The strategic advantage of the settlement sector rests on its ability to bring services together and not on its ability to deliver single services at the lowest possible cost. To achieve the former, agencies require direct experience with services which, in turn, places limits on the possibility, and desirability, of excessive specialization. The task group should examine the degree to which specialization and its close relative, rationalization, can be promoted without undercutting crucial links to cultural communities or

impeding the ability to agencies to acquire the special knowledge that allows them to creatively combine services.

More specifically, examinations of universal front-end assessments, such as those in Manitoba, or one-stop points of service such as in the Atlantic, have focused on their client impacts; less attention has been devoted to their impact on settlement agencies. The task group should examine whether centralized assessments and single-window service centres induce greater specialization among service providers and affect their ability to creatively combine services (essentially, leading agencies to compete on the basis of cost rather than program design and client service).

- The task group should examine the manner in which front-end, needs assessments could be systematically integrated with local, strategic planning endeavours (such as the Local Immigration Partnerships program in Ontario) as well as feeding analytic processes linked to policy and program design and strategic assessments related to partnership development.

4. STRENGTHENING CONNECTIONS WITH ETHNO-SPECIFIC AND MAINSTREAM ORGANIZATIONS: A STRATEGIC INVESTMENT IN BRIDGING SOCIAL CAPITAL AND LEVERAGE

As discussed earlier, settlement agencies contribute to newcomer integration by forming connections with ethno-cultural and religiously-based associations and with mainstream organizations, building *bridging social capital* and mediating relations between the two sets of institutions. The report argues that settlement organizations are uniquely positioned to build these links by virtue of their expertise and extensive involvement with newcomers. Investments in further strengthening the ability of the settlement sector to forge newcomer and mainstream connections would reinforce the sector's strategic advantage vis-à-vis newcomer integration.

In practice, the relationship among settlement service providers, ethno-cultural organizations and mainstream institutions is both complementary and competitive. On the one hand, settlement agencies help mainstream institutions with advice and training; on the other, they compete with these same organizations for funds and service contracts. An even more complicated relationship exists vis-à-vis ethno-cultural groups. At one end, the relationship is competitive: settlement agencies compete with mid to large ethno-specific organizations for funding. This is a source of tension between the groups. At the other end, the relationship is reciprocal and symbiotic: settlement agencies sub-contract services to ethno-cultural associations, partner with them on specific initiatives and provide core support. Ethno-cultural groups, for their part, help settlement agencies with translation, referrals, community access and establishing trust relations. Ethno-cultural and religiously-based organizations are often the first point of contact for newcomers, supplying

information, encouraging family participation and offering guidance regarding government and settlement services. They also play an important role in developing community leaders.

The changing policy landscape will almost certainly raise tensions among the three groups on some fronts while increasing their incentive to cooperate on others. This will place a high premium on finding the right balance between cooperation and competition and steering a strategic course between them. As noted earlier, government policies will likely increase the number of high skilled, fully fluent immigrants, many of them trained in Canadian universities and colleges. Mainstream agencies will become increasingly competitive, in terms of price and quality, in serving this segment of the market. The projected use of vouchers will further enhance their position. At the same time, the number of low to mid-skilled workers – many entering via temporary streams – will also increase, as will refugees from abroad. These latter groups present more complex cases, especially the refugees who often come from difficult circumstances and require multiple, integrated services and extended assistance. Mainstream agencies do not have the capacity to serve these populations. Here settlement agencies and ethno-cultural associations will continue to dominate service delivery.

In between the highly skilled and mid to low skilled groups lies a population (possibly shrinking) that can be served by either mainstream organizations or settlement service providers, with neither set of institutions enjoying a clear strategic advantage, especially in regard to language and employment services (the most likely competition sites). The 'selling point' for the settlement sector will be its ability to address overall family needs and to devise integrated adjustment programs. Four recommendations are offered to reinforce the settlement sector's strategic advantage and to strengthen relations with both ethno-specific and mainstream organizations.

Recommendation 8

In order to create a stronger strategic focus, the settlement sector should undertake a study to map the precise areas in which it enjoys a comparative advantage over mainstream and commercial service providers. This mapping should delineate the newcomer populations, geographic locations, immigrant services and policy areas in which the sector should specialize. Two particular areas to be investigated are the sector's role in continuing to provide language training and employment assistance, areas that mainstream service providers have successfully penetrated. The study should examine client preferences, employer and public perceptions of relative course quality and cost.

In addition to language and employment programs, the study should examine the increased reliance by governments on institutions such as schools and libraries to deliver services. These arrangements have produced collaboration in some instances, but have resulted in the displacement of settlement agencies in others. The study should examine contrasting outcomes with a view to identifying practices and partnering strategies that could be used by the settlement sector to ensure its place at the table.

Recommendation 9

The increased reliance by governments on mainstream organizations to deliver high-end training constitutes a form of ‘creaming’ and raises the *average* complexity of cases handled by settlement agencies. As a result, multi-barriered clients occupy a larger proportion of the overall caseload. A study should be undertaken by the settlement sector, in collaboration with federal and provincial governments, to determine the effect that greater participation by mainstream organizations is having on average case processing times and costs in the settlement sector.

Recommendation 10

The settlement sector should undertake a two-part internal study. The first part would map the exchanges that result when mainstream organizations assume responsibility for (some) immigrant services. These include training mainstream agency staff and advising or taking responsibility for difficult cases. The mapping would support Recommendation 5 which deals with cost recovery by settlement organizations, either directly from mainstream institutions or indirectly from government agencies. Precedents exist for both approaches.

The second component of the study would document the memberships, advisory roles and public awareness activities undertaken by senior agency staff and executive heads. The connections would include links to government agencies, to mainstream organizations and to ethno-cultural associations. Based on this mapping, the settlement sector, together with university researchers and federal and provincial governments (ideally through the institution described in Recommendation 2), should conduct a study of how such activities affect local integration outcomes. The study would offer ideas for how governments might invest in, or otherwise support, the capacity of settlement agencies to undertake bridging activities that enhance the receptivity of mainstream institutions to diversity. Governments have a shared interest, along with settlement agencies, in promoting such actions.³⁰ (See the discussion on metrics and financial accountability.) Again, precedents exist, such as the Calgary United Way program which allows settlement agencies to hire ‘shadow executives’ thus freeing up agency heads to get more involved in community relations.

Recommendation 11

The settlement sector should undertake a collaborative study with ethno-cultural agencies to determine how best to strengthen the sector’s connections with ethno-cultural groups. Strengthening these connections would reinforce the sector’s strategic advantage vis-à-vis mainstream agencies. The study should begin by documenting the reciprocal support that ethno-specific and settlement agencies provide each other.

Following the initial documentation, a further analysis should be undertaken of what settlement agencies might do, on their own or in collaboration with governments, to build

³⁰ A ‘public goods’ case can be made for governments to subsidize settlement agency involvement in community activities that enhance receptivity and integration.

up the capacity of ethno-specific organizations in critical domains identified by the mapping exercise. The analysis should focus on three potential areas: (i) Partnering: This would entail best practice recommendations for contracting with ethno-specific organizations to provide services to settlement agencies; (ii) Corporate support: This would entail recommendations for support and training by service provider organizations in areas such as fiscal planning. Numerous examples of support already exist and should be examined; and (iii) Sectoral support: Ethno-cultural organizations are often small and poorly funded. As a result, they cannot respond, as a sector, to reports such as this one. The study should examine how such a collective capacity might be organized, using the Ethno-cultural Council of Calgary as a possible model.

5. REDEFINING AND EXTENDING THE BOUNDARIES OF SETTLEMENT AND INTEGRATION SERVICES TO ACCORD WITH A CHANGING LANDSCAPE

As discussed earlier, changes in labour market migration combined with new population dynamics, economic restructuring and administrative issues have increased the pressure on settlement agencies to serve populations who are, largely, ineligible for assistance but nonetheless encumber services or generate requirements in areas where services are scarce. Both governments and settlement agencies are finding it difficult to navigate this landscape. The challenges can be grouped into three, partly overlapping categories:

- The number of temporary foreign workers, including seasonal workers, residing in Canada has exploded. This growth has been accompanied by an equally sharp increase in the demand for services. Whether or not these demands are met depends very much on where the claims are made. Citizenship and Immigration Canada, except in constrained circumstances, does not assist temporary foreign workers; at the same time, the provincial situation resembles a patchwork with Alberta offering a range of services while Ontario and British Columbia (among others) offer little support. Despite this, settlement agencies, right across the country, reported extensive involvement in service provision, including rights and abuse counselling, translation and orientation services, and family services. In some locales, agencies reported that up to thirty percent of their caseload was made up of temporary foreign workers (it was generally in the range of ten percent). This represents a substantial draw on agency resources and it is unlikely that this degree of financial exposure can be sustained. At the same time, settlement agencies are under considerable pressure from local communities, co-ethnic groups and their own Boards to provide assistance. There is also the fact that delays in the provision of settlement services contribute to poor integration outcomes. One agency expressed the view that groups were being ghettoized and that local communities were becoming extremely concerned.
- A second area where there is uncertainty and uneven treatment regarding eligibility concerns persons who have acquired citizenship or have been in Canada for more

than five years. The number of years before services are cut off varies across the country and the cut-off is applied with different degrees of vigour in different locations. The affected population includes spouses who have been home looking after children, elders (especially from non-Western backgrounds) and people who have obtained citizenship but whose skills do not equip them to cope with altered circumstances. One example involved people who were unprepared to deal with lay-offs during the recession.

- The third area of challenge has to do with increasing migration to suburban and metro adjacent regions as well as growing immigration to second and third tier cities (including Francophone immigration to Francophone minority communities outside Quebec). In addressing these shifting patterns and needs, settlement agencies and the populations they are trying to serve are confronted by locational challenges (they are not situated where new arrivals are settling) and by an underdeveloped infrastructure for addressing newcomer needs. This includes a paucity of agencies, a lack of trained staff to deal with newcomers, a failure by mainstream organizations to appreciate the adaptations that are needed, and underdeveloped networks connecting settlement agencies with mainstream community and municipal organizations.

Recommendation 12

The settlement sector, in collaboration with interested provinces and the federal government, should comprehensively document the services that are accessible to temporary workers in different parts of the country and how those services are being financed.. The study should also examine the inter-organizational partnerships that have evolved to offer these services, including employer-supported programs.

Following the initial documentation study, the settlement sector should undertake a further review – collaboratively, if possible – aimed at producing three deliverables:

- Comprehensive recommendations for a graduated set of services that would be made available to temporary workers and their families, subject to defined eligibility criteria. It is expected that the basic package would focus on legal rights, translation, health, family services and rudimentary language instruction (such as volunteer-based conversation circles). The recommendations should be costed.
- A guide of employer best practices accompanied by a settlement sector help line to assist with implementation. The service would be provided on a cost recovery basis.
- An analysis of community impacts and pressures experienced by settlement agencies as a result of large temporary worker intakes, such as the arrival of seasonal workers or the opening of large food processing plants. The analysis should include an assessment of local practices that have contributed to local receptivity. Particular emphasis should be placed on the role of service provider

organizations in mediating relations between temporary workers and mainstream institutions.

Recommendation 13

The Settlement sector should undertake a pan-Canadian review documenting the varied practices that are in place for offering settlement and integration services to long-time residents and citizens. The study should note the circumstances that prevented individuals from accessing the services (typically, but not exclusively, language training) upon arrival as well as their reasons for seeking help after an extended period in Canada. The study would recommend changes in existing practices along with ideas for financing services, including user fees, local sponsorship and volunteering. This direction supports the recent Standing Committee Report on Best Practices in Settlement Services.

Recommendation 14

The settlement sector should undertake a pan-Canadian review of agency best practices in delivering support to remote, underserved locations. The study should explicitly target the use of itinerant services, new communication technologies, self-instruction and third-party, contracted delivery. Special attention should be paid to support for Francophone immigrants in communities outside Quebec.

The study should explore the possibility of constructing regional consortia, led by settlement agencies, to deliver services to underserved regions. The services would be financed by governments and by mainstream local institutions (municipal agencies, private sector entities or community-based organizations).

Recommendation 15

The settlement sector should conduct a review of pilot projects underway in several provinces, including Ontario, Manitoba and British Columbia, aimed at promoting integrated, community-led planning to create more welcoming communities. The review would focus on the effects of different leadership structures, the challenges associated with building effective local networks and the potential for partnerships with academic institutions to support local planning through analysis and research. Recommendations would be made to governments regarding the financial and logistical support that settlement agencies would need in order to play a lead role in local planning structures. The recommendations would address the proposals contained in the Standing Committee Report regarding the Local Immigration Partnerships program in Ontario.

ANNEX A: ADVISORY BODIES

Two pan-Canadian advisory bodies were created to guide and reflect on the project: a Settlement Sector National Reference Group composed of Canadian Immigrant Settlement Sector Alliance (CISSA) / Alliance Canadienne du Secteur d'Établissement des Immigrants (ACSEI) executive committee members and invited colleagues from Ontario and Quebec; and an Academic Advisory Committee composed of university-based researchers with an interest and expertise in the area of immigration, diversity and integration.

The National Settlement Sector Reference Group was formed to help guide and focus the study. The Reference Group provided a test-bed for ideas and helped facilitate logistical arrangements, including regional workshops with settlement agencies and meetings with ethno-cultural organizations. The Reference Group reviewed the draft final report and provided feedback on the study's conclusions and recommendations.

The Reference Group was convened four times over the life of the project: two sessions were held in Ottawa in conjunction with meetings of the Settlement and Integration Joint Policy and Program Council (SIJPPC); and two additional sessions were conducted by teleconference. The meetings focused on study directions and preliminary conclusions.

The Academic Advisory Group was formed to provide the study author with feedback on ideas and methodology and to ensure that the study would be seen as independent and consistent with high intellectual standards. The Advisory Group was convened only once, at the end of the study, to review the draft report and to offer suggestions regarding the analysis and conclusions drawing on the relevant research literature and a close reading of the text.

National Reference Group List

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ANNEX B: INTERVIEW LIST

BRITISH-COLUMBIA

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Vancouver Foundation

ALBERTA

WORKSHOP WITH SERVICE PROVIDER ORGANIZATIONS

Sarah Amies
Program Director
Lethbridge Family Services

Lena Bengtsson
Secretary
Immigrant Settlement Services, Grand Prairie

Lynn Merithew
Corporate Relations Liaison CCIS

Josephine Pallard
Director at large
Changing Together: A Centre for Immigrant Women, Edmonton

Georges Bahaya
Director
Centre d'accueil et d'établissement d'Edmonton

Christina Nsaliwa
Director
Edmonton Immigrant Services Association

Judy Sillito
Edmonton Mennonite Centre for Newcomers

Bev Sheckter
Director
Jewish Family Services Calgary

Veena Chandra
Director
C.A.R.E. Red Deer

Dale Taylor
Executive Director
Centre for Newcomers

Beba Svirig
Director
Calgary Immigrant Women's Association

Leanne Hullick-Reyes
Provincial Coordinator
Alberta Association of Immigrant Serving Agencies (AAISA)

Amanda Card
Project Coordinator
Communications, Research, Governance
Alberta Association of Immigrant Serving Agencies (AAISA)

Patrick Hanlon
Alberta Association of Immigrant Serving Agencies

MEETING WITH ETHNO-SPECIFIC ASSOCIATIONS

Marichu Antonio
Executive Director
Ethno-Cultural Council of Calgary

Eunice Mahama
Coalition for Equal Access to Education

Desh Subba
Advisor, Nepalese Community Society of Calgary (NCSC)

Bharat Regmi
Secretary, Nepalese Community Society of Calgary (NCSC)

Issa Mosa
Chairman, Kurdistan Alberta Cultural Immigrant Society (KACIS)

Nassir Faqiryman
President, Afghan Canadian Association of Calgary

Dago Correa
Chilean Canadian Community Association

Maribel Javier
President, Council of Filipina

Dorothy Zharko
Recorder ISCC

Bukurie Mino
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INDIVIDUAL INTERVIEWS WITH SERVICE PROVIDERS

Dale Taylor
Executive Director
Centre for Newcomers

Din Ladak
Chief Executive Officer
Immigrant Services Calgary

Fariborz Birjandian
Executive Director
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Linda Gale
Director
SAAMIS Immigration Services Association, Medicine Hat

Lena Bengtsson
Secretary
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Sarah Amies
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FEDERAL AND PROVINCIAL INTERVIEWS

Jill Francis
Settlement Officer
Citizenship and Immigration Canada

Daisy Pond
Settlement Officer
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Immigration Policy and Programs
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Margaret Overland
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Shauna Summers
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Alberta Employment and Immigration

Caroline Fairbrother
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Yared Belayneh
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Jaime Enachescu
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MANITOBA

WORKSHOP WITH SERVICE PROVIDER ORGANIZATIONS

Marty Dolin
Executive Director
Manitoba Interfaith Immigration Council (MIIC)

Linda Lalande
Executive Director
Immigrant Centre

Noelle DePape, BA, MA (Adv)
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Immigrant and Refugee Community Organization of Manitoba Inc.

Heather Robertson
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MEETING WITH ETHNO-SPECIFIC ASSOCIATIONS

Daniel Asrat
Ethiopian Orthodox Church and Ethiopian Society of Winnipeg

Amanuel Hadgu

Eritrean Society in Manitoba

Ghirmay S Yeibio
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Ahamed and Yousif Jama
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Sloane Phan
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Daniel Bitajabuka
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INDIVIDUAL INTERVIEWS WITH SERVICE PROVIDERS

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Citizenship and Immigration Canada

Robert Vineberg
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OTHER INTERVIEWS

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ONTARIO

WORKSHOP WITH SERVICE PROVIDER ORGANIZATIONS

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Community MicroSkills Development Centre
United Way Member Agency

Stephen Lam
Director
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OTHER INTERVIEWS

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Coordonnatrice – volet jeunes
Table de concertation des organismes au service des personnes réfugiées et immigrantes

Marie-Josée Duplessis
Coordonnatrice du volet intégration
Table de concertation des organismes au service des personnes réfugiées et immigrantes

ATLANTIC CANADA

WORKSHOP WITH SERVICE PROVIDER ORGANIZATIONS

Bridget Foster (Newfoundland)
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Gerry Mills (Nova Scotia)
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Immigrant Settlement and Integration Services (ISIS)

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Robyn Webb
Director, SmartBusiness
Greater Halifax Partnership

Robert P. Moody
Chief Executive Officer
Canada's Immigration Museum, Pier 21

Ramya Rangalle
Project Coordinator , Welcome Home to Canada
Canada's Immigration Museum, Pier 21

Peter Mortimer
Senior Director
United Way of Halifax Region

CITIZENSHIP AND IMMIGRATION CANADA – NATIONAL HEADQUARTERS

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Director, Information, Language and Community Program Policy
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