Understanding Settlement Work

Workshop findings and design implications for supporting the complex decision making landscape of immigrant settlement workers

March 13, 2013

Prepared for Courthouse Libraries BC
in collaboration with

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Executive Summary

Executive Summary

- OpenRoad facilitated a one-day discovery workshop at Courthouse Libraries office in Vancouver, Feb 21, 2013, using participatory methods

- Settlement workers collectively analyzed a variety of decisions they are required to make and determined what artifacts*, skills, habits, experience, and natural talents (ASHEN) are required to support those decisions

- Amongst the key decision clusters or decision themes that emerged from the workshop include the importance of initial assessments, resources and referrals, safety, and eligibility. Participants described the interrelatedness of these decision clusters, demonstrating a high degree of dependency and connection amongst all decisions.

- ASHEN analysis suggests design opportunities to support the various decision clusters for the PLEI sector, Courthouse Libraries BC, and the settlement workers' agencies. New resources, training, checklists, further research are all possible outcomes of this work.

* Artifacts – includes processes, documents, database tools, etc.

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Workshop Methodology

How the workshop unfolded and what exercises were undertaken by the group

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Workshop Methodology

- Pre-workshop activity:

  - **Decision Questionnaire** - immigrant legal scenarios sent to settlement workers to analyze what actions they undertake to resolve their client's issues

  - **Action/Decision Analysis** - analysis of questionnaire response, extraction of key, high importance decisions faced by settlement workers, creating raw material for the workshop

- All-day workshop process:

  - **Decision Clustering** - group sorting, organizing of individual decisions from questionnaire results into bigger clusters / themes

  - **Input/Output** - reviewed inputs and outputs of decisions

  - **ASHEN** - asked what artifacts, skills, habits, experience , natural talent required to make decisions. Group discussion to end the session.

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Pre-Workshop Methodology

Decision Questionnaire/Analysis

- Four different scenarios provided to immigrant settlement workers, each describing a different legal subject area.

- For each scenario, settlement workers were asked:

  - How would you help this client? Please describe how you would approach this and describe the steps you would take to assist this client.

  - Please identify the key decisions you would have to make to assist your client.

- 12/14 workshop attendees answered the questionnaire.

- 75 decisions were extracted from the questionnaire answers and transcribed onto post-it notes, to be used as the raw material for a grouping exercise by workshop participants.

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Workshop Methodology

Decision Clustering/Analysis

- 75 individual decisions were clustered into similar groups, by the settlement workers in a group exercise.

- 12 major decision clusters emerged

- Analysis Round 1: participants were asked to describe inputs and outputs to decisions and what resources are used

- Analysis Round 2: participants were asked to describe the interrelatedness of the decision clusters as a network diagram

- Analysis Round 3: participants were asked, for each decision cluster, what artifacts, skills, habits, experience, and natural talent is required when the type of decision is made

- Open discussion / wrap-up

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Workshop Insights

Observations and conclusions from the workshop

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Decision Clusters

12 major decision clusters emerged from the group's analysis

- safety
- initial assessment
- quick service
- trust
- language
- eligibility

- financial
- org/program mandate
- self assessment
- referral and resources
- support
- urgency

Decision Cluster Connectivity

All displayed varying degrees of connection, demonstrating the importance of certain decisions, like **initial assessment** and **referral & resources**, in relation to others.

	connections
initial assessment	10
referral and resources	9
safety	7
language	6
eligibility	6
support	6
financial	5
trust	4
urgency	4
org/program mandate	4
self assessment	4
quick service	3
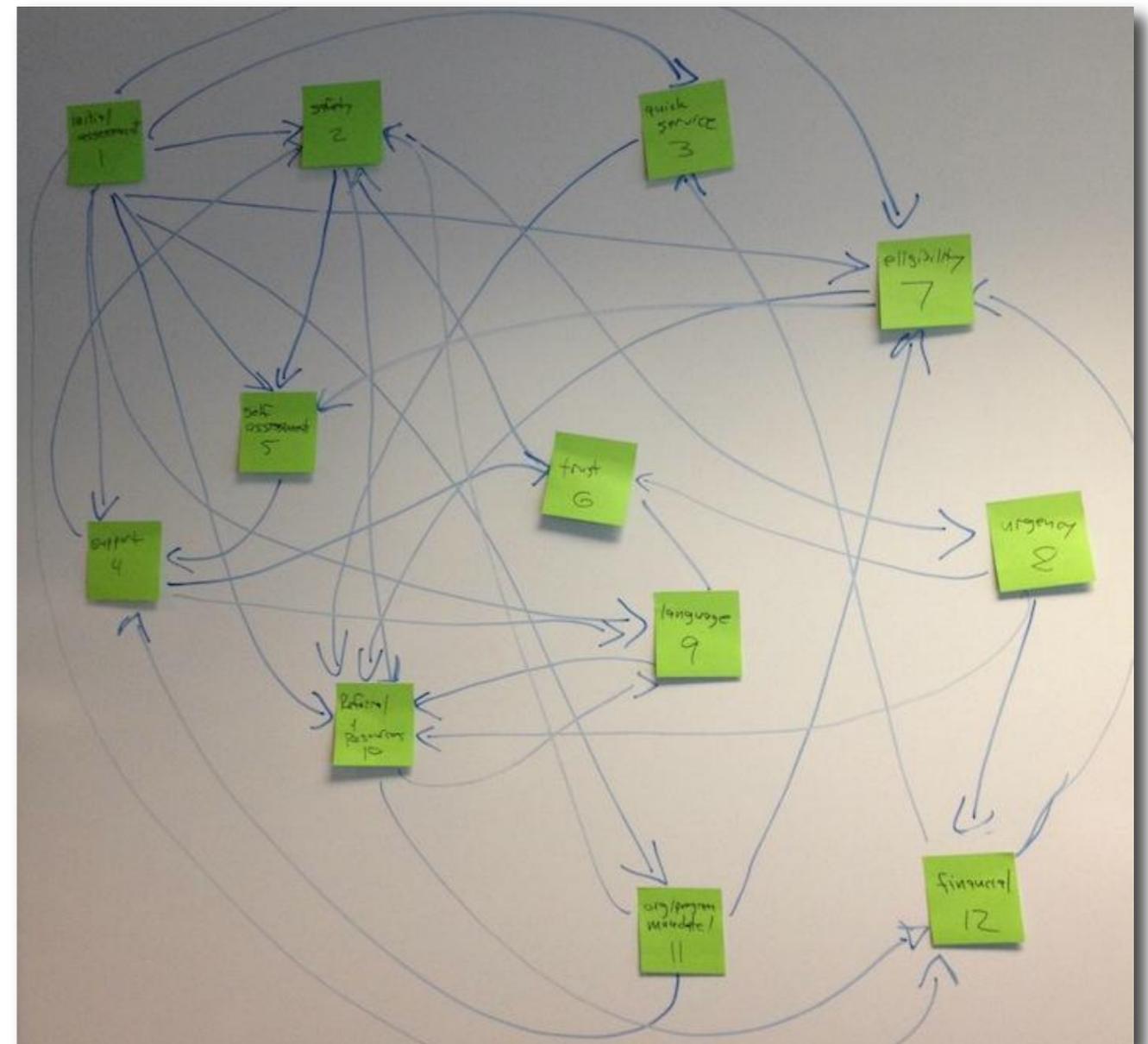
ASHEN Output (1/4)

Workshop participants identified what artifacts, skills, habits, experience, and natural talents (ASHEN) were used to support decision clusters. These lists are transcribed from the workshop post-it notes.

Initial Assessment
have gone through the same experience
social work background
be interested
understanding/welcoming/happy personality
open-minded
easy to talk to
empathy
thorough details
following up
organization of documents
asking questions
listening
cultural sensitivity
language
communication
experience
settlement eligibility assessment criteria
form
generic form (global assessment form for basics)
drop-in
referral
telephone
assessment form
database software & computer

Trust
positive attitude
good listener
empathy
training:- cross cultural
second language
current knowledgeable
helpful attitude
empathy
listening skills
communication skill
asking questions
cross cultural training
non-judgment
sensitivity training
communication skills
listening skills
empathy training
monitoring form
evaluation form
feedback form
comment form
posted in various languages: compliant
procedure
confidentiality form in various languages
signage in office

Quick Service
generalist disposition
good memory
good listener
quick learner
broad experience
good listener
community services
training
language ability
listening skills
client centered
quick decision
computer skills
knowledge on language specific
knowledge of resources in communities
knowledge of CIC
count no. referral
collect -> services provided ->
count # of service areas
data collection form

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ASHEN Output (2/4)

Workshop participants identified what artifacts, skills, habits, experience, and natural talents (ASHEN) were used to support decision clusters.

Financial
interaction skills
people skills
counseling
listening
assessment skills
keep copy of clients' ID (legal paper)
observation
initial assessment
knowledge of possible financial benefits
computer skills
tax knowledge
accounting skills
language
personal owning
tax workshops
welfare initial aids/pension incomes
income tax (noa)
banking (account balancing)
CCTB
volunteer for help

Self Assessment
work with commitment
everyday practicing
learn from my mistakes
self preparation w/ information and
resources
self evaluation
to have debriefing
our own experience
open mind
tolerant
be sympathetic
be generous
be good listening
be resilient
learn to say no
empathy
ability to know what you don't know
job eval w/ supervisor
we would like to have more training re: /
stress management
take care of myself (health) x emotional
read about multiculturalism
be aware of my bias
client eval of how worker is doing
"code of ethics" (doesn't exist)
diversity training

Support
encourage our clients
teaching the client in becoming self-sufficient
case management
tend to help client beyond program's
mandate
attentive listener
education training experience
empathy
good listening
community connections
keep the good relationship w/ other services
and organizations (resources)
referrals
gaining client's trust
counseling
resources in client's first language

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ASHEN Output (3/4)

Workshop participants identified what artifacts, skills, habits, experience, and natural talents (ASHEN) were used to support decision clusters

Org/Program Mandate
Good memory
accepting of new rules/studying skills
direct services
events organizing
case management
attending regular internal meetings
initial assessment form (glance)
update yourself (information)
attending regular training
initial assessment
counseling skills
computer (database)
knowledge of each policy
memorized skill
organizing skill
filing skill
attending workshops and seminars
policy changes/update broadcasts/emails
supervisor who can answer
feedback from clients
perf reviews
program policy
ORG policy
Immigration documents
Intake form

Safety
Mental checklist of questions
extracting information
experience going through similar situations
dealing with safety issues
safety and well being regulations
active listening
first aid course
asking questions
local safety resources
safety plan
training
worker safety training
client safety assessment checklist
first aid kit
fire extinguisher
safety protocols
physical layout of your office

("safety" refers to both worker safety and client safety)

Eligibility
Direct communication
Being a good listener
Education
Previous experience
continuous learning through: - gov't services,
- trainings,
- colleagues
through client situation/cases
Present-SIP/ assumptions -eligibility, -fix the problem
Future-SIP/ more pointed questions before services provided
Self Assessment
Settlement Orientation Training
Networking/Bldg. community contacts
Knowledge about the program
deep knowledge of eligibility criteria
ability to exercise discretion - RT status (new)?
verbal communication / interaction
client intake form
Immigration Documents - PR card, landing dox, confirmation of PR (A)

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ASHEN Output (4/4)

•Workshop participants identified what artifacts, skills, habits, experience, and natural talents (ASHEN) were used to support decision clusters

Referral & Resources
Immigration Law (training & updates)
Language training (3rd language)
Employment Standards Act (Training & Update)
Tenancy Rights (Training & updates)
Family Law (Training)
Paraphrasing
Active listening
Taking notes
Stay calm w/ diff clients or stressful situation
Talking w/ supervisor when diff situations or client
Self evaluation - questioning myself.
Training for new family law (update)
Training every time a new resource is available
Legal resource training (dif processes for)
dif. Issues e.g. housing, employment, education
computer proficiency training
basic counseling training
establish referral protocol
generic forms
tools fact sheet
specific issues information, publication & brochures in 1st language
tools comp/laptops, ipads, smart phones
database of comm. Services inc. website, dif.
Language they serve client/worker
Patient
Quick learner
Good listener
Resourceful
Ability to calm people who are stressful
Out Spoken
good resources

Language
Patience
Non-Judgmental Attitude
Body language
life experience/maturity
active listening
cultural competence b/c settlement worker is from the same cultural background
cultural competence b/c settlement worker is very familiar with that clients culture/language
orientation toward encouraging to learn english
create a cultural comfort zone
settlement workers fluent in diff lang
training in diff languages
english classes (at the right time)
CLB, ELSA, language tests
life skills workshop
forms in different languages: spanish, farsi, chinese, punjabi, taglog
interpretation services $
documentation of education level
translation services

Urgency
Transition houses
counselors for women + children fleeing violence
scarcity of resources/wait lists late?
google search
phone
red book
safety checklists
support for the worker
waitlist knowledge (websites/phone service)
professional network
protocol for common emergencies
supervision
teamwork
cpi / (non violent crisis information)
active listening
crisis management training
1st aid
training in need assessment
knowing the local laws/subject matter
knowing resources
ask ?'s
checklist
book the amount of time to do it
crisis time experience
quick decision maker
manage yourself
calm
professionalism

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Workshop Analysis

Observations and conclusions from the workshop

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Post-Workshop Analysis

- For each of the major themes, Courthouse Libraries and OpenRoad reviewed the ASHEN output and set about to answer the questions:

  - Why does the decision cluster / decision theme matter?

  - What can the PLEI sector do to support and improve decision making in this decision cluster related to legal matters?

  - More specifically, what can Courthouse Libraries of BC do (via Clicklaw, other CLBC initiatives, and building off existing work being done by others) to support and improve decision making in this decision cluster related to legal matters?

  - Are any of the decision clusters / decision themes more or less relevant for asking the question, how can PLEI help? Who can help for those less relevant clusters/themes?

    This last question attempts to acknowledge that useful insights were derived for the entire immigrant settlement worker community, but may be out of the scope of this investigation and subsequent PLEI-related initiatives.

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Initial Assessment

Why it matters?	What can PLEI do?	What can CLBC do?

• Initial assessment can be very influential in shaping the future possibilities of how an issue is resolved
• Small decisions up front can have significant impact later
• Focusing on presenting problems may mean you miss the bigger, larger problem which is the "real issue"
• You have to assess - it can't be avoided
• A breadth of legal knowledge is required to be effective - workers need to know a little about a lot and be generalists, recognizing when they are beyond their own depth, and need to hand-off
	• Continue to make sure resources are available to settlement workers so they can gain sufficient legal knowledge (training, courses, print materials, online, etc.)
	• Make legal information useful, usable, and findable by including settlement workers and/or new immigrants in the design process
	• Make the format appropriate for settlement workers and/or new immigrants by including settlement workers and/or new immigrants in design process
	• Help keep settlement workers informed about changes, important developments in the law (keep them up to date on relevant legal matters) / (email newsletters / listserv communities of practice / intervening in existing communities of practice)
		• Keep settlement workers informed about changes, important developments in the law
		   • Blog about new resources that come available, curated specifically for areas of interest for settlement workers
		   • Create a curated subset of content that Clicklaw currently offers for settlement workers, co-developed with volunteers from the settlement worker community
		   • Target existing online communities / listservs with updates about Clicklaw (increase reach & awareness to settlement workers - keep top of mind).
		• Make legal information useful, useable and findable by including settlement workers and/or new immigrants in the Clicklaw design process

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Referral and Resources

Why it matters?	What can PLEI do?	What can CLBC do?
• This is where the action is; it's where resolution is happening (or at least one step closer) • Where there's a hand over / transition to another service provider, there's a risk that it's not successful, gap there • Settlement workers have to be able to find resources and referrals - that suggests an information findability problem • Resources matter, because the opportunity for clients to solve problems themselves may exist • Solving it yourself matters, because the people services are limited - there's scarcity of that service (whereas some resources, digital ones, scarcity problems don't exist in the same way) • Settlement workers need to know the boundaries of what they can provide and once reached, refer • Recognizing that boundary & the potential harm caused if overstepped • Resources have a lifespan - persist through time; which in turn help educate & strengthen the knowledge of a broader community (resource as social object)	• Make legal information useful, usable, and findable by including settlement workers and/or new immigrants in the design process. • Create different types of resources: legal information services (via people, tools, training); legal info & referral services that PLEI provides (there are limits on what they do); • Explore new ways of engaging with the intended audience; PLEI resources: how do you get people to use them, trust them - build in that human element • Investigate different formats (e.g. theatre to demonstrate legal problem solving) • Support settlement workers to develop better information and referral skills; (model: how librarians always reference the source of legal information). Result: not only improves the credibility of referral / resource (teaches client, teaches the settlement worker, may lead to other discoveries) • Evaluate what's currently available to see what's working	• Continue to catalogue the legal information resources & legal services for new immigrants on Clicklaw • Make it easier for repeat Clicklaw users to find their favourite resources/services • Build alerts to new resources and services on Clicklaw • Allow for Clicklaw user review of resources (i.e. allow settlement workers to rate and rank resources) • Evaluate other ways of expanding, other ways of relevancy / popular ranking (exploring options to guide people to right resources via network analysis of resources) • Share expertise with settlement workers in how to provide information and referral services

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Quick Service (a type of Resource & Referral)

Why it matters?	What can PLEI do?	What can CLBC do?
• Ultimately, as described by the workers, it's a type of referral: here's the source; I know the answer • But the risk is that they might be blind another answer if they rely on memory • A resource (or referral) in workers' head could be out of date, new resource should be in their head instead (back to the same problems currency of information, keeping up to date, adding a bit of rigor around developing the skills) • Its quickness can be deceiving ; the perception of quickness might not be quick	• Inventory or look into what the body of basics about "quick service" actually is • Might suggest creation of new resources and of new processes around updates to those resources	• Support the ongoing discovery and cataloguing (and finding) of resources

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Safety & Urgency

Why it matters?	What can PLEI do?	What can CLBC do?

• Safety (of the client as well as the settlement worker) is clearly important
• Human lives hang in the balance with the possibility and threat of violence
• Safety is directly related to urgency, which helps workers prioritize where to start (initial assessment), impacts referrals and resources
• Other urgent matters: job at risk, kids at risk, impacts quality of life, here, now, today of the client
• Urgency & safety combined is about the most important thing settlement workers attend to
	• Continue to provide resources on violence in relationships (expands on traditional version of abuse)
	• Victim services programs exist, clearly point to referral opportunities in other material
	• Ongoing training around screening for violence
	• Direct to available assessment tools to screen for violence
	• Being clear and helping expand the boundaries / definitions around safety (safety of seniors, elders)
	• Decisions are being made in real-time, the referral info must be up to date and accessible: accuracy of data (e.g. up to date phone numbers), findability of data
	• Findability of content, understandability of content / plain language / quality of the content
	• Suggests understanding what's on the other side of urgent (what information corresponds with urgent) / design implication is to contemplate where to create resources that don't currently exist
		• Explore building better connections between resources and services on Clicklaw.
		  • Via Clicklaw, design so that certain keywords trigger a reminder to call particular services (searching for words that would be directly related to the possibility of violence)
		  • Via Clicklaw, link common questions to include help map services; helping the urgency aspect of the user find things quickly in their community (both settlement worker and possibly other proxy users or immigrants themselves)
		• Clicklaw resources and services are as up to date and accessible as possible.
		  • Explore ways to better share service information between service providers and Clicklaw

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Language

Why it matters?	What can PLEI do?	What can CLBC do?
• Immigrants speak different languages other than English • Inability to speak and/or read English represents a significant barrier to being successful in resolving an immigrant's issue, legal or otherwise.	• Commitment to basic legal information in a multitude of different languages • Translate and adapt materials; different immigrant groups have different contexts and it's not just a one-for-one translation • Reality: the services have to be navigated in English, making some language strategies not practical; set too high an expectation (and a false sense of service) compared to reality • IPC project: targeting ethnic media; changes in the law; e.g.: running a story in Chinese newspapers; continue to tap into where the community is getting their information (have others do work for you) • IPC: mapped out media that each community would go to; produce info in that language, available in that community	• Clicklaw: review resources in different languages (current site = 2011 language decision) - in 2013 look at different groups, add to Clicklaw • Conduct more regular review for legal info and services available in other languages • Localization: keep navigation in English, important to be realistic and manage the user expectations (don't have capacity to provide navigation/service in other languages.) • Make it easier to respond to changes in landscape – if new language group emerges, be able to respond and add it to Clicklaw quickly

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Financial & Eligibility

Why it matters?	What can PLEI do?	What can CLBC do?
• Might discuss financial eligibility about service at our settlement org • Might also mean financial eligibility about other services / orgs • How do we get you help financially out there? • Taxes: understanding the tax system as an area of law (part of becoming Canadian); difficulty: super broad • Are you eligible for welfare, housing benefit, child tax benefit, how do you qualify for CPP, OAS, etc. • Other possibilities: i've got a job, how do I file my taxes, I have a business, how do I file my taxes • Your own financial eligibility; ability to get legal aid (part of referral process) • Financial theme as a presenting problems: it could be the source of lots of issues • Settlement worker decision around possibility or perception of eligibility, could limit client access (same as initial assessment: small decision up front means big downstream impact) • No point sending them to something they are not eligible for (client who is making 6 figures, owns 3 properties, won't send to legal aid)	• PLEI provides description of some legally related benefits, resources (categorized as things financial that you can do yourself) • Provide clear communication around what eligibility criteria are • Possible project: common eligibility standards? Definitions of assets, etc.	• Explore ways of improving content and visibility of information on HelpMap services, i.e. making "restrictions" information tab more visible.

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# Support, Trust, Org Mandate & Self Assessment

- Categories less applicable to PLEI and Courthouse Libraries but still very important:

  - Support - discussed the immigrant / settlement worker relationship and trying to help immigrants become self sufficient (tension between not helping enough and helping too much)

  - Trust - was focused on the relationship between the immigrant / settlement worker; how to be credible, reliable, personable?

  - Org Mandate - decisions focused on settlement workers evaluating whether their org was responsible in a particular situation (related to Referral if answer is no)

  - Self Assessment - settlement worker individual care, professional development, avoiding burnout

Next Steps

Our recommendations for moving forward with the settlement workers and supporting their decisions

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you are here
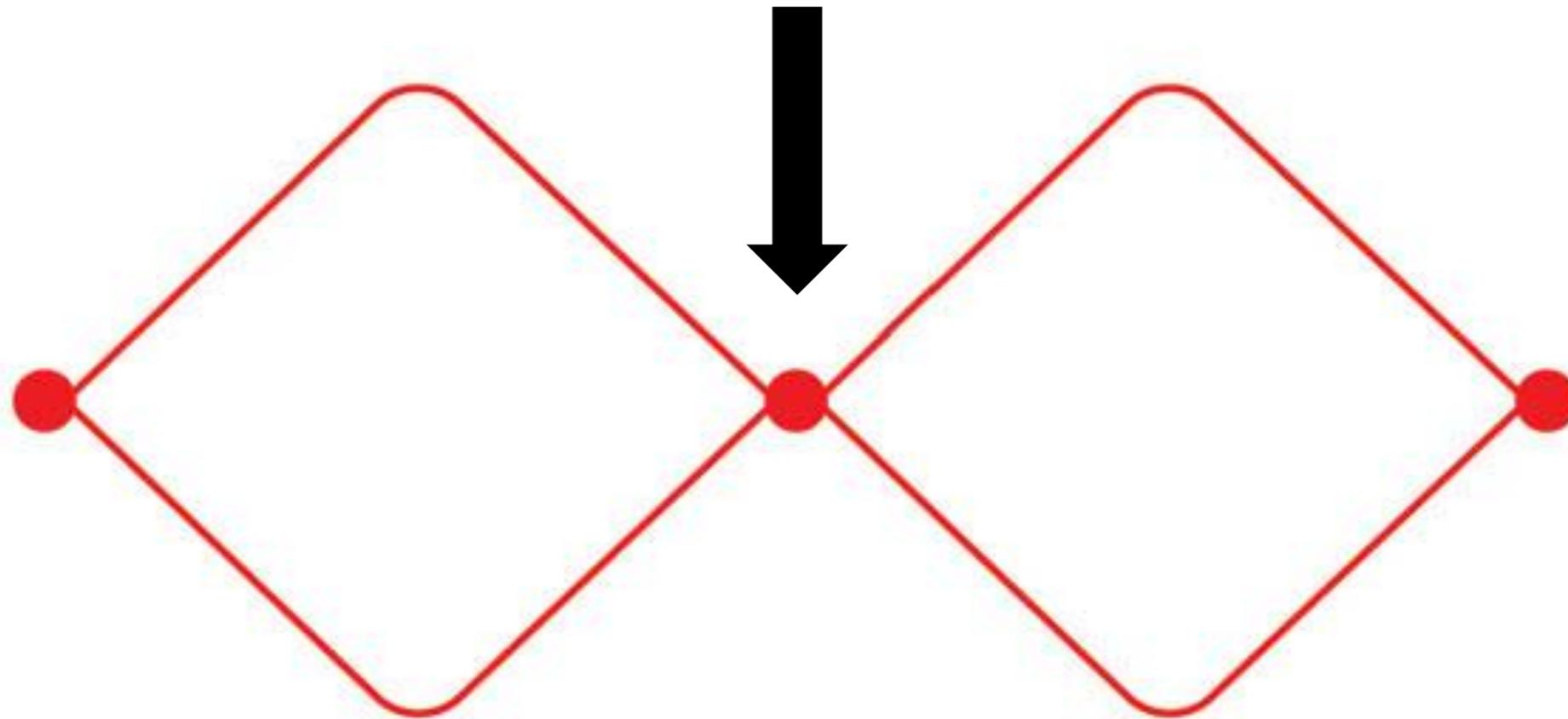
problem space   solution space

Next Steps

- Report out findings to the Immigrant PLEI Consortium project members (IPC), settlement workers involved in the project, and Public Legal Education and Information Working Group (PLEIWG)

- Review Courthouse Libraries BC design implications against current service plan for 2013/2014

- Review design implications with IPC, Clicklaw steering committee for feedback

- Submit proposal to Ministry of Justice to respond to report findings as they relate to CLBC work.

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Summary of Possibilities: What CLBC can do… (1/5)

- **Alerts**: Keep settlement workers informed about changes, important developments in the law

    - Build alerts to new resources and services on Clicklaw

    - Review existing knowledge about communication methods that work best with settlement workers; consultation with settlement workers

    - Blog about new resources that come available, curated specifically for areas of interest for settlement workers

    - Target existing online communities / listservs with updates about Clicklaw (increase reach & awareness to settlement workers - keep top of mind).

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Summary of Possibilities: What CLBC can do… (2/5)

- **Content**: Ongoing discovery and cataloguing of legal information resources & legal services for new immigrants on Clicklaw

  - Consult with settlement workers re: content

- **Content**: Clicklaw resources and services are as up to date and accessible as possible.

  - Explore ways to better share service information between service providers and Clicklaw

Summary of Possibilities: What CLBC can do… (3/5)

- **Content**: Clicklaw: review languages (current site = 2011 language decision) - in 2013 look at different groups, add to Clicklaw

- **Navigation**: Localization: keep Clicklaw in English, keeping expectations realistic (resources required to provide language specific navigation would be out of scope of project funding and require substantial ongoing funding)

- **Findability**: Make it easier for repeat Clicklaw users to find their favourite resources/services

Summary of Possibilities: What CLBC can do… (4/5)

- **Findability**: Make legal information findable by including settlement workers and/or new immigrants in the Clicklaw design process

- **Findability**: Explore building better connections between resources and services on Clicklaw.

  - Via Clicklaw, design so that certain keywords trigger a reminder to call particular services (searching for words that would be directly related to the possibility of violence)

  - Via Clicklaw, link common questions to include help map services; helping the urgency aspect of the user find things quickly in their community (both settlement worker and possibly other proxy users or immigrants themselves)

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Summary of Possibilities: What CLBC can do… (5/5)

- **Feedback**: Allow for Clicklaw user review of resources (i.e. allow settlement workers to rate and rank resources)

- **Feedback**: Evaluate other ways of expanding, other ways of relevancy / popular ranking (exploring options to guide people to right resources via network analysis of resources)

- **I&R Training**: Share CLBC expertise with settlement workers on information and referral services (best practices)

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Appendix

- Pre-workshop Questionnaire questions (Word doc)

- Decision Workshop Transcription (Excel file)

- Attendee list (Word doc)

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Thank You

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