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

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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.
Workshop Methodology
How the workshop unfolded and what exercises were undertaken by the group
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.
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.
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
Workshop Insights
Observations and conclusions from the workshop
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.

<table>
<thead>
<tr>
<th>Decision Cluster</th>
<th>Connections</th>
</tr>
</thead>
<tbody>
<tr>
<td>initial assessment</td>
<td>10</td>
</tr>
<tr>
<td>referral and resources</td>
<td>9</td>
</tr>
<tr>
<td>safety</td>
<td>7</td>
</tr>
<tr>
<td>language</td>
<td>6</td>
</tr>
<tr>
<td>eligibility</td>
<td>6</td>
</tr>
<tr>
<td>support</td>
<td>6</td>
</tr>
<tr>
<td>financial</td>
<td>5</td>
</tr>
<tr>
<td>trust</td>
<td>4</td>
</tr>
<tr>
<td>urgency</td>
<td>4</td>
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<tr>
<td>org/program mandate</td>
<td>4</td>
</tr>
<tr>
<td>self assessment</td>
<td>4</td>
</tr>
<tr>
<td>quick service</td>
<td>3</td>
</tr>
</tbody>
</table>
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
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
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)
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

OpenRoad
Workshop Analysis
Observations and conclusions from the workshop
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.
### Initial Assessment

<table>
<thead>
<tr>
<th>Why it matters?</th>
<th>What can PLEI do?</th>
<th>What can CLBC do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initial assessment can be very influential in shaping the future possibilities of how an issue is resolved</td>
<td>• Continue to make sure resources are available to settlement workers so they can gain sufficient legal knowledge (training, courses, print materials, online, etc.)</td>
<td>• Keep settlement workers informed about changes, important developments in the law</td>
</tr>
<tr>
<td>• Small decisions up front can have significant impact later</td>
<td>• Make legal information useful, usable, and findable by including settlement workers and/or new immigrants in the design process</td>
<td>• Blog about new resources that come available, curated specifically for areas of interest for settlement workers</td>
</tr>
<tr>
<td>• Focusing on presenting problems may mean you miss the bigger, larger problem which is the “real issue”</td>
<td>• Make the format appropriate for settlement workers and/or new immigrants in design process</td>
<td>• Create a curated subset of content that Clicklaw currently offers for settlement workers, co-developed with volunteers from the settlement worker community</td>
</tr>
<tr>
<td>• You have to assess - it can’t be avoided</td>
<td>• 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)</td>
<td>• Target existing online communities / listservs with updates about Clicklaw (increase reach &amp; awareness to settlement workers - keep top of mind).</td>
</tr>
<tr>
<td>• 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</td>
<td></td>
<td>• Make legal information useful, useable and findable by including settlement workers and/or new immigrants in the Clicklaw design process</td>
</tr>
</tbody>
</table>
# Referral and Resources

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>• This is where the action is; it's where resolution is happening (or at least one step closer)</td>
<td>• Make legal information useful, usable, and findable by including settlement workers and/or new immigrants in the design process.</td>
<td>• Continue to catalogue the legal information resources &amp; legal services for new immigrants on Clicklaw</td>
</tr>
<tr>
<td>• Where there's a hand over / transition to another service provider, there's a risk that it's not successful, gap there</td>
<td>• Create different types of resources: legal information services (via people, tools, training); legal info &amp; referral services that PLEI provides (there are limits on what they do);</td>
<td>• Make it easier for repeat Clicklaw users to find their favourite resources/services</td>
</tr>
<tr>
<td>• Settlement workers have to be able to find resources and referrals - that suggests an information findability problem</td>
<td>• 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</td>
<td>• Build alerts to new resources and services on Clicklaw</td>
</tr>
<tr>
<td>• Resources matter, because the opportunity for clients to solve problems themselves may exist</td>
<td>• Investigate different formats (e.g. theatre to demonstrate legal problem solving)</td>
<td>• Allow for Clicklaw user review of resources (i.e. allow settlement workers to rate and rank resources)</td>
</tr>
<tr>
<td>• 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)</td>
<td>• 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)</td>
<td>• Evaluate other ways of expanding, other ways of relevancy / popular ranking (exploring options to guide people to right resources via network analysis of resources)</td>
</tr>
<tr>
<td>• Settlement workers need to know the boundaries of what they can provide and once reached, refer</td>
<td>• Evaluate what's currently available to see what's working</td>
<td>• Share expertise with settlement workers in how to provide information and referral services</td>
</tr>
<tr>
<td>• Recognizing that boundary &amp; the potential harm caused if overstepped</td>
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<tr>
<td>• Resources have a lifespan - persist through time; which in turn help educate &amp; strengthen the knowledge of a broader community (resource as social object)</td>
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Quick Service (a type of Resource & Referral)

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<tr>
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<th>What can PLEI do?</th>
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</tr>
</thead>
<tbody>
<tr>
<td>• Ultimately, as described by the workers, it's a type of referral: here's the source; I know the answer</td>
<td>• Inventory or look into what the body of basics about &quot;quick service&quot; actually is</td>
<td>• Support the ongoing discovery and cataloguing (and finding) of resources</td>
</tr>
<tr>
<td>• But the risk is that they might be blind another answer if they rely on memory</td>
<td>• Might suggest creation of new resources and of new processes around updates to those resources</td>
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</tr>
<tr>
<td>• 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)</td>
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<tr>
<td>• Its quickness can be deceiving; the perception of quickness might not be quick</td>
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## Safety & Urgency

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<th>What can PLEI do?</th>
<th>What can CLBC do?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Safety (of the client as well as the settlement worker) is clearly important</td>
<td>• Continue to provide resources on violence in relationships (expands on traditional version of abuse)</td>
<td>• Explore building better connections between resources and services on Clicklaw.</td>
</tr>
<tr>
<td>• Human lives hang in the balance with the possibility and threat of violence</td>
<td>• Victim services programs exist, clearly point to referral opportunities in other material</td>
<td>• 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)</td>
</tr>
<tr>
<td>• Safety is directly related to urgency, which helps workers prioritize where to start (initial assessment), impacts referrals and resources</td>
<td>• Ongoing training around screening for violence</td>
<td>• 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)</td>
</tr>
<tr>
<td>• Other urgent matters: job at risk, kids at risk, impacts quality of life, here, now, today of the client</td>
<td>• Direct to available assessment tools to screen for violence</td>
<td>• Clicklaw resources and services are as up to date and accessible as possible.</td>
</tr>
<tr>
<td>• Urgency &amp; safety combined is about the most important thing settlement workers attend to</td>
<td>• Being clear and helping expand the boundaries / definitions around safety (safety of seniors, elders)</td>
<td>• Explore ways to better share service information between service providers and Clicklaw</td>
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<tr>
<td></td>
<td>• 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</td>
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</table>
## Language

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<tr>
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<th>What can CLBC do?</th>
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</thead>
<tbody>
<tr>
<td>• Immigrants speak different languages other than English</td>
<td>• Commitment to basic legal information in a multitude of different languages</td>
<td>• Clicklaw: review resources in different languages (current site = 2011 language decision) - in 2013 look at different groups, add to Clicklaw</td>
</tr>
<tr>
<td>• Inability to speak and/or read English represents a significant barrier to being successful in resolving an immigrant's issue, legal or otherwise.</td>
<td>• Translate and adapt materials; different immigrant groups have different contexts and it's not just a one-for-one translation</td>
<td>• Conduct more regular review for legal info and services available in other languages</td>
</tr>
<tr>
<td></td>
<td>• 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</td>
<td>• 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.)</td>
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<td></td>
<td>• 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)</td>
<td>• Make it easier to respond to changes in landscape – if new language group emerges, be able to respond and add it to Clicklaw quickly</td>
</tr>
<tr>
<td></td>
<td>• IPC: mapped out media that each community would go to; produce info in that language, available in that community</td>
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# Financial & Eligibility

<table>
<thead>
<tr>
<th>Why it matters?</th>
<th>What can PLEI do?</th>
<th>What can CLBC do?</th>
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</thead>
</table>
| • 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. |
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
You are here

Problem space \hspace{2cm} \text{Solution space}

Reference: Design Council, UK
http://www.designcouncil.org.uk/designprocess
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.
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).
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).
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)
Appendix

- Pre-workshop Questionnaire questions (Word doc)
- Decision Workshop Transcription (Excel file)
- Attendee list (Word doc)
Thank You

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