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Feasibility Study for a Settlement Sector Online Community of Practice

FINAL SUMMARY REPORT

Prepared for:

Integration-FCRO, Citizenship and Immigration Canada

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Executive Summary

In early 2014, CIC commissioned two small-scale research initiatives to validate a perceived need for an online community of practice (CoP) for underserved segments of the settlement community (see list in Introduction).

These initiatives were an environmental scan of existing communities of practice and a pan-Canadian survey of stakeholder interest and capacity to engage in online communities.

This summary report provides an analysis of the scan and survey findings, along with additional context provided by the following:

- Roadmap for the Implementation of a National Repository and Related Tools for Collaboration for Adult Language Training Resources (Pensivo for CIC, 2009)
- Engagement Strategies for the IQN (Learning Agents for CIC, 2010)
- Digital Habitats: stewarding technology for communities (Wenger, White and Smith, 2009)

Given the constraints of time and resources, this report is designed to be a brief snapshot of current knowledge and recommended next steps.

Summary of the findings

Strong support for a community of practice

92.1% of survey respondents supported the establishment of an online community of practice. However, there were only 84 respondents to the survey, which represents a tiny fraction of the community.

Agreement between scan and survey

There were several commonalities between the environmental scan and the survey:

- The need for a common framework for group identification and cohesion
- The importance of making the community relevant to the daily lives of its participants
- The importance of active moderation
- The importance of accessibility and ease of use
- The availability of alternatives to integrated online CoPs
- A lack of enthusiasm for (and examples of) government-run online communities (No government-led CoPs were found in Canada that engage the public on an ongoing basis.)

With the exception of the last item, these findings were supported by the additional literature.

Special needs of small Francophone communities

Although this issue was not explicitly identified in the current research, the Pensivo report makes special mention of Francophone communities outside of Quebec, due to their small size, fragmented nature and unique needs. Simply translating English material or adapting Quebec resources will not meet the needs of these communities.

More research is needed

Although the survey indicates that there is strong support for an online community, the significant number of open questions remaining call for more research before going forward with even with a limited pilot.

If this research is performed in a collaborative manner, it will build an informed and engaged community consensus, paving the way for a successful launch. Greater community involvement in uncovering its needs and moving forward to developing solutions to meet them will help ensure community buy-in. Effectively, this means starting the community of practice before launching the technology solution. This collaborative methodology was followed by both Tutela and IQN and helped contributed to the success they have achieved.

Suggested areas to research

- **Target groups**
Greater efforts should be made to assess the size and makeup of the community.
- **Case studies: Tutela and IQN**
Studying these closely related examples will provide more lessons learned and perhaps opportunities for community leverage. In particular, the governance models of each should be compared with regard to the goals of a settlement community of practice.
- **Key purposes of the community and the niche(s) that it will occupy**
Finding a focus for the community among the various options will reduce duplication and ensure a common framework, increasing engagement and sustainability.
- **Facilitate internal discussions at CIC regarding goals and governance**
This point is related to the one above. Detailed discussions about goals will get the various CIC stakeholders on the same page. Based on an analysis of Tutela and IQN, CIC should make a decision on whether to actively lead the community, or to support it as a (mostly) silent partner.

The research suggested above need not be time intensive, painstakingly rigorous or expensive, but additional modest efforts at this stage will increase the return on investment of the initiative as a whole.

If this research is performed in a collaborative manner, it will build an informed and engaged community consensus, paving the way for a successful launch. Greater community involvement in uncovering its needs and moving forward to developing solutions to meet them will help ensure community buy-in. Effectively, this means starting the community of practice before launching the technology solution. This collaborative methodology was followed by both Tutela and IQN and helped contributed to the success they have achieved to date.

Follow best practices to implement the solution

Using the insights gathered from the additional research outlined above, leveraging the learning of the many communities which have gone before should result in success. The Pensivo report outlines one set of recommended best practices. Other processes are outlined in the previously cited *Digital Habitats* (technologyforcommunities.com/excerpts/actionnotebook/) and also in the *Community of Practice Design Guide* from Educause, a well-known non-profit focused on technology for higher education (bit.ly/CoPDesignGuide). These are outlined in the conclusion.

Introduction

Based partly on the success of the Tutela and International Qualifications Network (IQN) initiatives, it has been suggested that a similar online Community of Practice solution might help support other sections of the settlement community across these funding streams:

- Community Connections
- Language Training
- Information and Orientation
- Employment Related Services
- Needs Assessment and Referrals

In addition there are program areas such as the Local Immigration Partnerships (LIPS) and the Réseaux en immigration francophone where there has been interest expressed in online community building. Furthermore, there are agencies working with specific target groups such as immigrant youth and women who have expressed interested in online collaboration.

CIC also supports several working groups that might benefit from the existence of an online community of practice as a way to mirror the ongoing work of various groups that currently meet face-to-face and via phone and video conferences.

The following anticipated benefits of creating a community of practice for the settlement sector have been identified:

- Increased community awareness of evolving trends in government policy and service delivery
- Sharing of best practices and tools
- Increased professionalization of the service provider community
- CIC community engagement on research and policy formulation

Target Group Survey – Significant Findings

Background

CIC funded Immigrant Settlement and Integration Services (ISIS) in Halifax to undertake a pan-Canadian online survey to determine the level of interest in, and capacity to engage in an online community of practice.

A survey of 20 questions was developed in consultation with CIC and took place over two weeks in February 2014. Surveys were done online using Survey Monkey. Respondents included service providers and provincial representatives. The majority of respondents were reached via their provincial umbrella organizations.

The survey was sent to an audience of 600 possible respondents. There were 84 responses (68 English, 16 French), reflecting a response rate of 14%.

Survey highlights

There is strong support for an online community of practice

Q16. Are you interested in participating in an online community of practice for the settlement sector?

Yes: 92.1%

Over 75% of respondents already research best practices online

Q5. Do you currently go online to find 'best practices' related to settlement (for example, ways to better serve clients, human resources or organizational development best practices)?

Yes: 77.5%

Over 50% of respondents share information online

9. Do you currently share information (or ask for help) online regarding settlement issues?

Sometimes: 55.1% Rarely: 25.6% Never: 19.2%

Respondents use email, a variety of websites and some existing online communities to find and share information

Q10. What online space do you use to share information (or ask for help) online regarding settlement issues?

(See details in Appendix)

- Email related (12)
- Extranets (6)
- National websites (26)
 - Government run portals (13)
 - Government run communities (2)
 - Non-profit run portals (5)
 - Non-profit run communities (6)
 - Tutela (4)
 - **Pathways to Prosperity: Canada** (2) *p2pcanada.ca*
Welcoming Communities repository of research documents, best practices, community initiatives and Subject Matter Experts.
Participation from all levels of government, non-profit and educational sectors.
- Provincial websites (29)
 - Government run (8)
 - Non-profit run portals and communities (21)
- Local websites (6)
- International websites (1)
- Unknown websites (1)
- Open Internet – Google and social media (5)
- Miscellaneous electronic (5)

Most respondents were comfortable with sharing information

Q11 (follow on from Q10). If not, why not?

Only 21 of 84 skipped the previous question and 15 responded to this question. These figures imply that most respondents do share information. Among the “Other” responses (9) is a strong

indication of seeking rather than sharing information, implying a misunderstanding of the question.

Almost 90% of respondents read online research reports.

Q12. How often do you read research reports related to settlement?

Often: 49.3% Sometimes: 39.0% Rarely: 9.1% Never: 2.6%

Almost 80% of respondents participate in forums, listservs and webinars

Q15. Have you participated in online discussion forums, webinars, or listservs?

Yes: 79.0%

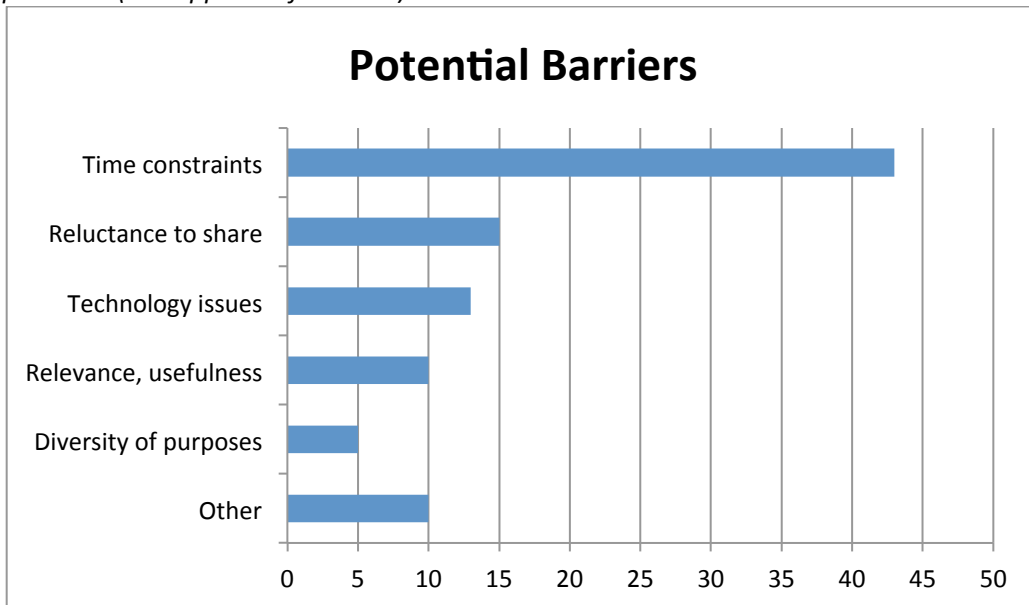
Two thirds of respondents preferred listservs and online forums to for communication; webinars are close behind

Q18. Which mode of communication would you prefer to communicate by:

Email groups (listserv) 65.8% Online discussion posting 68.4% Webinars 61.8%

But respondents could imagine several potential barriers to success

Q19. In general, what do you think are the barriers to participation in an online community of practice? (see Appendix for detail)



Discussion of Potential Barriers

“Time constraints” was the top barrier identified in the responses gathered. Its dominance is further enhanced by the related barrier of “Relevance, usefulness”, since participants who don’t see particular content as relevant to their needs are unlikely to make time for it. This finding reinforces the need to connect with day to day operational needs, identified at various points in the data.

“Diversity of purposes” also has relevance in this regard, since trying to meet too many needs at once can lead to a lack of focus in the community experience, resulting in overly generalized

content or difficulties in finding relevant content. This potential barrier is also identified in the environmental scan below as “lack of a common framework”.

“*Technology issues*” is an understandable concern and is echoed in the environmental scan below, both as a barrier (“limited technical skills”) and as a best practice (“usability”). However, this concern has likely declined over the years as the Internet has become more pervasive.

“*Reluctance to share*” has a number of aspects, based on the comments supplementing the responses to this question and the free comment space of Question 20, including:

- Perceived competitive advantage (this was mentioned most)
- Uncertainty or fear of negative consequences, either by internal management or by CIC
- Privacy (which may be related to fear of negative consequences)

However, since only 15 respondents (18%) identified reluctance to share as a potential barrier, it’s important not to put too much emphasis on these comments. There are many examples in the literature of communities of practice with members from competing organizations, who learn to exercise judgement on what to share. Nearer to home, Tutela has several private groups for confidential discussion. Thus, the affordances of the technology can be intelligently combined with audience awareness to avoid the vast majority of real or perceived issues regarding sharing.

Respondents provided additional insights on needs, success factors and barriers

Q20. Please tell us your comments about an online settlement community of practice

Free comments solicited by this question were classified into the three main topics outlined below (*see Appendix for more detail*).

Needs and purposes of the community

There were many comments about the need for practice improvement and professional development. Other needs identified included performance support, a “one stop shop” for information, and a platform for research and policy development.

Success drivers and success factors to watch

Success drivers included the increasing pervasiveness of the Internet, the benefits of going virtual (such as reduced travel costs) and Tutela in particular as a familiar model of recent success.

Success factors to watch included making sure the technology is accessible, managing the diversity of groups and purposes, relevance to daily realities, the importance of good facilitation and adequate promotion.

Barriers

Several respondents took the opportunity to echo comments about potential barriers, including time constraints, useful alternatives, and reluctance to share.

Comments were mixed about the potential role for CIC. Two of the comments applauded the CIC requirement that EAL organizations sign on to Tutela, but at least one comment pointed out the danger of a too-intrusive CIC presence as potentially “stifling”.

Remaining knowledge gaps

How do funding streams overlap among service providing organizations?

Unfortunately, the data gathered was insufficient to determine what the funding patterns were for responding organizations. Knowing how funding streams might overlap among organizations could be useful data for designing online sub-communities. However, the sample size was relatively small and there may be other ways to develop this data.

How do practitioners currently find settlement information?

For many respondents the Internet represents a place to find rather than share information. However, data was insufficient to learn about the online search patterns of the community, such as sources and keywords. This could inform how to curate information resources. However, detailed analysis of existing communities such as Tutela and IQN should be helpful in this regard.

Environmental Scan – Significant Findings

Background

The Ontario Council of Agencies Serving Immigrants (OCASI) was tasked by CIC with undertaking a comparative scan of ten online Communities of Practice to identify trends, best practices and recommendations for a settlement sector Communities of Practice.

Insights

There are several alternatives to integrated online Communities of Practice

Some of these alternatives would be constituent elements of an integrated online community, others would function as independent complements:

- Listservs (email lists)
 - Examples: Canadian Council for Refugees (CCR), OCASI Issues
- Wikis
 - Example: wiki on SettlementatWork.Org
- Social Media
 - Twitter (hashtags: #CdnImm, #cdnrfg, #diversity, #inclusion and #NewCdns)
 - LinkedIn Groups (e.g. Canadian Institute of Diversity and Inclusion, Sick Kids Cultural Competence Community-of-Practice)
 - Facebook (typically used for one-way broadcast)
- E-learning
 - Example: LearnAtWork.ca courses
- Discussion Forums
 - Example: Settlement.Org discussion forum for newcomers
- In-Person Events
 - Examples : OCASI #CdnImm events, Local Immigration Partnerships (LIPs) PD events and seminars organized by various colleges and universities.

Ed note: Other alternatives/complements include:

- *Google Groups, Ning and other forms of Web 2.0 Community of Practice solutions*

- *Broadcast mailing lists (no interaction), e.g. hireimmigrants.ca*
- *Public webinars, e.g. hireimmigrants.ca*
- *Simple search (e.g. Google) for public documents and pages on the Internet about settlement issues. Although this is not normally considered part of a CoP, it is an alternative (or supplement) to the “one stop shop” of curated online resources that a CoP might contain.*

No government-led CoPs were found in Canada that engage the public on an ongoing basis

- There are CoPs exclusively for government workers
 - Examples: GCpedia, Federal Youth Network, Community of Federal Regulators
- There are engagement websites for the purpose of short-term consultation
 - Examples: Blueprint 2020 (internal GOC), Let’s Talk...Weather / Parlons...meteo! (public engagement)

Some best practices and success factors were identified:

Ed note: based on OCASI knowledge and experience, not the scan

- Active moderator
- Large pool of potential users
- ***Common purpose/framework***
- Alternative engagement methods (email, Twitter, etc.)
- User experience: usability, visual design

Some barriers to success were identified:

Ed note: based on OCASI knowledge and experience, not the scan

- Reluctance to share
- Limited technical skills
- Preference for F2F
- Disconnect with daily tasks
- ***Lack of a common framework***

OCASI put forward some useful recommendations:

Ed note: based on OCASI knowledge and experience AND the scan

- Target people who work within a common framework and with shared learning objectives
- Actively moderate it to encourage engagement
- Make it visually appealing and easy to use
- Do not require advanced computer skills
- Use alternative engagement methods, such as social media or emails, in addition to the main platform
- Integrate it into the daily workflow of users (*ed: relevance, ease of use*)

Additional insights from other sources

A community of practice is more than a website

(From OCASI scan report) Communities of Practice can be described as “...groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly.” (Wenger, 2006).

For the purpose of its environmental scan, OCASI defined a Community of Practice as an online platform which members must join in order to share resources, take part in discussions and engage in professional development.

However, the literature shows that communities of practice can take many forms, both online and offline or a blend of the two, where members interact with other people and information virtually and face to face, publicly and privately, to solve problems, develop professionally and advance practice in their field.

The question then becomes: in what ways can online tools enhance and support existing communities in the settlement sector?

It's important to understand the orientation of your community

[Digital Habitats: stewarding technology for communities](#) is an influential work in the community of practice field, full of useful advice that goes well beyond discussions of technology. Among other guidelines, it strongly suggests taking the time to analyze the community for its orientation and expectations. The authors suggest that these orientations should influence technology choices, start-up methods, performance measures and sustainability strategies. The book outlines nine potential orientations, which can be present in varying degrees:

Orientation 1: Meetings

The degree to which regular meetings with specific outcomes is important.

Orientation 2: Open-ended conversations

The degree to which casual conversation replaces formal meetings, either online or face to face.

Orientation 3: Projects

The degree to which the community is organized around specific initiatives, or creating particular artefacts.

Orientation 4: Content

The degree to which the community is organized around creating, sharing and providing access to documents, tools and other content.

Orientation 5: Access to expertise

How important is focused and timely access to expertise in the community's domain?

Orientation 6: Relationships

The degree to which the community is focuses on relationship building among members as the basis for ongoing learning and being available for mutual support.

Orientation 7: Individual participation

The degree to which individual members chart their own customized learning path, often simultaneously in several communities.

Orientation 8: Community cultivation

The degree to which the community pays attention to its cohesiveness as a group.

Orientation 9: Serving a context

The degree to which the community strives to go beyond the individual needs of its members to serve a broader context (e.g. improving outcomes for immigrants).

Based on community polling and other research, these orientations can be visually mapped with a variety of tools for easier analysis. Examples are provided on the next page.

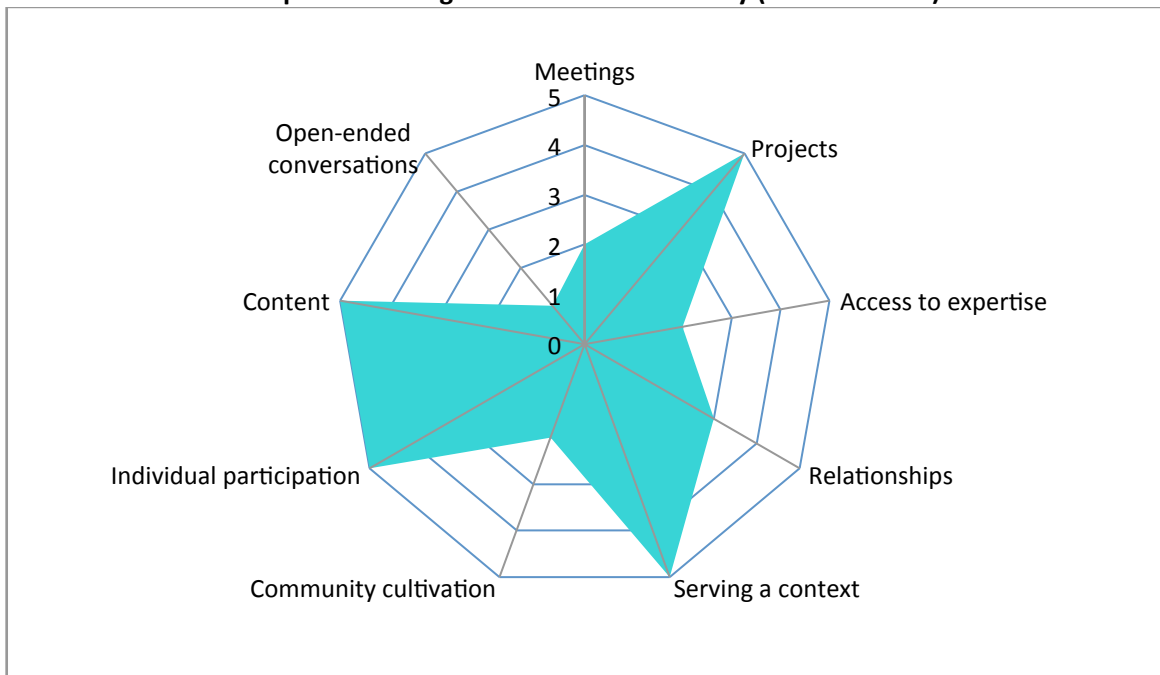
More information, including an action notebook for strategy development (including an orientation polling tool) can be found in these online excerpts of the book:

<http://ennuonline.com/wp-content/uploads/2012/02/DigitalHabitats-Chapter62.pdf>

<http://technologyforcommunities.com/2011/12/editable-version-of-chapter-10-action-notebook/>

Example of a community orientation map

Workplace learning stakeholder community (Pan Canadian)



It's important to be sensitive to human factors

In 2009, Pensivo provided a report to CIC entitled “Roadmap for the Implementation of

a National Repository and Related Tools for Collaboration for Adult Language Training Resources”, which informed the development of the Tutela community of practice. This document contains lots of useful information. In particular, we wish to highlight the following section in “Conditions for Success and Value Statements”:

Human Factors (edited)

- **Empowerment and Buy-In** (engage the community when developing):
This writer has seen many examples of online services that failed because of lack of buy-in from the targeted user group. This happens when online services are built and designed by consultants and experts without input from users. Even though the online environment works technically well, is reliable and pleasant, people feel it is not theirs. Thus, rather than secretly building a high-calibre service and surprise users with an unanticipated launch, it is highly advisable to involve users at every step. Users should sense that the Repository is theirs, that it will only be as good as they make it and, that they can significantly influence its direction. This is accomplished by demonstrating “what’s in it for me” at the individual, group and corporate levels, and by maintaining a high level of consultation and participation in decision-making.
- **Belonging and Communities of Interest** (reinforce group identity):
People who share common needs, motivations, challenges, satisfaction are communities of interest. The suite of online services can focus generally on the “community of professionals involved with language training for newcomers”. It can then sub-focus on the needs of teachers, assessors, content producers, administrators, etc. with database sub-sets and discussion groups available to keep those sub-communities empowered. Being part of a select group is a strong motivator for repeat visits.
- **Celebration of Success:**
*People who contribute to the advancement of their profession in general and to the success of this project in particular should be recognized and their individual and collective successes should be celebrated. This needs to be done on a continuous basis, both formally and informally. As one illustration: Publicizing a monthly “teacher-of-the-month” (for each jurisdiction) newsfeed has more promotional impact at much lower cost than simply mailing out a fancy brochure once a year. Celebration can happen through many forms of recognition from individual certificates of accomplishment and, informal public success stories to formal award events.**
- **Community Development as a Modus Operandi:**
If the above principles are applied, the project becomes a community development project...for a virtual community. The project is fed from the bottom up, in an organic process, with continuous feedback loops demonstrating that input really counts. Leaders are animators more than directors. The project is always a work-in-progress; while it achieves measurable milestones, it is never really completed. It can be a bit “messy” in that it morphs frequently but the ability to adapt is its strength and its most promising feature for long-term survival.

***Engaging methods to build online community**

In a report provided to CIC in 2010 entitled “Engagement Strategies for the IQN Community of Practice”, Learning Agents proposed a series of “carrot incentives” as a form of community recognition, recognizing contributions such as:

- Most active rookie
- Best mentor
- Most effective community builder (e.g. bringing in new members)
- Most prolific online contributor

Since that time, several online communities have evolved the practice to provide “digital badges” to recognize participant activities and achievements. One such example is provided below:



<http://badges.connectededucators.org/#>

This “gamification” of online recognition has proved to be a popular engagement strategy and is now making its way into education and training practices, led by the Mozilla Open Badges initiative (openbadges.org).

Discussion and analysis

Similarities between scan and survey

The findings of the scan and the survey reinforced each other in the following areas:

- The need for a common framework for group identification and cohesion
- The importance of making the community relevant to the daily lives of its participants
- The importance of active moderation
- The importance of accessibility and ease of use
- The availability of alternatives to integrated online CoPs
- A lack of enthusiasm for government-run online communities

With the exception of the last item, these findings were supported by the additional literature.

Gaps, questions and issues

What is the key purpose of the community?

Few would argue the importance of setting clear goals prior to starting new initiatives. Yet clarity is lacking for the community which is being considered. This needs to be addressed. Is it all or only some of the following?

- Increased community awareness of evolving trends in government policy and service delivery?
- Sharing of best practices and tools?
- Increased professionalization of the service provider community?
- CIC community engagement on research and policy formulation?

It is interesting to note that, according to the Pensivo report, Tutela began as a proposal for an online repository, but evolved into a more full-fledged community of practice based on detailed feedback from the community in the collaborative development process.

What is the orientation of the community?

What mix of the following is the best?

- Unilateral communication (improved awareness)
- Multilateral communication (community feedback)
- Policy development (leverage community knowledge)
- Practice improvement (share knowledge, documents, best practices)
- Performance support (find help)
- Professional development (increase capacity of individuals and organizations)
- Community cohesion (strengthen, sustain the community)

What does the community look like?

Size of the community

Statistics seem to be hard to gather. The Pensivo report estimated an audience size of 7000, from a formula based on the number of learners. It projected an online community size of 1400, based on a participation rate of 20%. The online community is now over 6000 members. According to the survey, CIC-funded EAL organizations are required to sign on to Tutela, which may be a large contributing factor, but it is unclear whether the original audience size estimate was accurate.

Finding a “common framework” among the CIC-funded Service Provider Organizations

What degree of overlap is there between:

- Funding streams – how many organizations span which funding streams?
- Common needs of different funding streams (e.g. client service, management excellence)?
- Different roles in the organization (front line, manager, Executive Director)?
- Different jurisdictions?

Tutela has been cited as a solution in this regard. Although there are differences between EAL teachers, there is a common desire to find and share resources and explore methods of teaching. This helps make Tutela a cohesive community.

But there are flexible ways to channel information and subdivide activity on Tutela as needed. For example, there is a “community” homepage with a public forum that is organized into general topics of discussion. Automatic recommendations appear within the discussion threads for similar forum posts and resources. Users also have the ability to search within these threads.

There is also a separate “group” homepage for more goal-oriented collaboration that includes both public and private groups that discuss specialized topics. Through these groups, users can forge closer connections with no-limit chat and video conferencing options.

The lesson from Tutela seems to be that by starting simply and building out public and private spaces organically when driven by demand, an online settlement community should be able to nurture the “common frameworks” that are necessary to grow the online community.**Francophone communities outside Quebec**

The Pensivo report makes special mention of Francophone communities outside of Quebec, due to their small size, fragmented nature and unique needs. Simply translating English material or adapting Quebec resources will not meet the needs of these communities.

Role and needs of CIC

Is CIC a silent partner, an active participant or will it lead the community? Tutela and IQN represent two different approaches in that one is housed within CIC and the other, while funded by CIC, is located externally and operates independently. CIC does not engage with stakeholders on either community. However, CIC staff do actively “gatekeep” community contributions on IQN. Which approach is working best and why? Should CIC be mindful of the negative potential for “stifling” the community by engaging too closely? A closer analysis of Tutela and IQN should shed light on this issue.

Overall, CIC needs to consider what it is interested in having in terms of an online community of practice. Which of the following is it interested in:

- A focused policy development forum?
- A place to work with existing forum, work groups, councils, between face-to-face meetings?
- A holistic environment for observation?
- A place to communicate key messages to the service provider community?

Non CIC-funded organizations

These include such organizations as charities, other governments, sectoral bodies and employer associations. To what degree should these organizations be able to participate? To what degree should they be supported to participate?

What will success look like?

And how will it be measured? This depends on the purpose of the community.

- Community size and growth?
- Overall online activity?
- Detailed Google Analytics (visit length, areas visited, exit pages, etc.)
- Evidence of human interaction and dialogue?
- Emerging Subject Matter Experts?
- Substantive content generated? (policy statements, guidelines, FAQs, etc.)
- Evidence of interaction with content? (commenting, tagging, voting, etc.)
- Satisfaction surveys?
- Learning outcomes benchmarking and tracking?

SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong support in the survey (92%) • Increasing pervasiveness of access to the Internet and mobile networks • Influence of social media: Facebook, LinkedIn, Google Groups, etc. • Increasing popularity of webinars and videoconferencing • Visible success of Tutela 	<ul style="list-style-type: none"> • Small survey sample • Not yet a clear consensus on purpose • Diversity of potential needs undercuts notion of “common framework” • Not as many “shareables” as for Tutela’s EAL community (learning resources, Web 2.0 tools, etc.) • Francophone community outside QC is small & has unique needs • Several barriers identified, especially Time, Technology & Reluctance to share • Some tend to see it as a “one stop shop” rather than a peer exchange • Potential disconnect between online content and activities and daily realities of service delivery – “relevance”, “workflow integration”, “performance support”
Opportunities	Threats
<ul style="list-style-type: none"> • Curated knowledge space for underserved stakeholders • Strengthened community ties and increased morale for SPOs • Access to expertise ->performance support • Share best practices ->practice improvement • Professional development, e-learning • Research and policy development • Better communication of policy and operational changes • Reduced travel costs 	<ul style="list-style-type: none"> • “Noise” from and overlap with other alternatives could: <ul style="list-style-type: none"> ○ Prevent the service from getting on the audience radar ○ Cause friction with other systems and their stakeholders • Without strong, clear Terms of Use and good facilitation there is potential for: <ul style="list-style-type: none"> ○ CIC bashing ○ Ad hominem “flame wars” • Policy discussions could generate inflated expectations of change • Expectation of translation could drive up costs, slow down dialogue • Privacy violations – members or their clients • Slow failure due to any/all of: <ul style="list-style-type: none"> ○ Lack of focus, fragmented audience ○ Inadequate marketing, facilitation ○ Technology accessibility, ease of use

Conclusion

More research is needed

Although the survey indicates that there is strong support for an online community, the significant number of open questions remaining call for more research before going forward with even with a limited pilot.

Study Tutela and IQN in more depth

- Study the online communities in detail from an ethnographic (i.e. group culture) perspective. For example, what sub-communities have emerged and how did they develop?
- Interview the people behind the communities to validate their success factors and lessons learned, especially during start-up. There may also be useful advice regarding community facilitation and marketing
- Consider setting up action research areas on the system for brainstorming solutions to issues that concern the community. These can include diverse elements such as resource curation, learning delivery, brainstorming in forums and on wikis, and more formal document collaboration. Such initiatives often work best if they are sharply time-delimited, such as in a two-week “sprint”
- With its stakeholders, gently explore the notion of expanding the scope of Tutela or the IQN to include the other settlement communities

Facilitate an internal discussion at CIC regarding goals and governance

Using this report, supplemented by other materials as necessary, develop an orientation briefing and series of questions to explore needs, issues and solutions with internal CIC stakeholders.

Research the target groups more fully

Greater efforts should be made to assess the size and makeup of the community. Following the models of Tutela, IQN and the Pensivo report, this research should be collaborative and iterative, using focus groups. This will greatly inform the development of a common framework and ensure buy-in from the community.

Identify the niche that the community will occupy

This will take into account existing services, such as IQN, Tutela and other national and regional services. Although this will evolve over time, this mapping process will reduce duplication and avoid friction in the greater online community.

The research suggested above need not be time intensive, painstakingly rigorous or expensive, but additional modest efforts at this stage will increase the return on investment of the initiative as a whole.

If this research is performed in a collaborative manner, it will build an informed and engaged community consensus, paving the way for a successful launch. Greater community involvement in uncovering its needs and moving forward to developing solutions to meet them will help ensure community buy-in. Effectively, this means starting the community of practice before launching the technology solution.

This collaborative methodology was followed by both Tutela and IQN and helped contributed to the success they have achieved.

Follow best practices to implement the solution

Using the insights gathered from the additional research outlined above, leveraging the learning of the many communities which have gone before should result in success. The Pensivo report outlines one set of recommended best practices. Other processes are outlined in the previously cited *Digital Habitats* (technologyforcommunities.com/excerpts/actionnotebook/) and also in the *Community of Practice Design Guide* from Educause, a well-known non-profit focused on technology for higher education (bit.ly/CoPDesignGuide).

Because they are based on experience with several communities, they represent a practice paradigm, which is outlined below, using the Pensivo 7-step process as a framework:

1. Research and plan

The nature and needs of the community need to be researched, ideally in a collaborative fashion. Inputs, activities and goals can be established by developing a Logic Model and these elements matched to a feasible budget. See the “**Appendix: Initial Draft for a Logic Model**” at the end of this document as a suggested starting point.

2. Design

Design includes information design, visual design, technology design and designing for measureable outcomes.

3. Produce

Depending on the choice of technology and the needs identified this may include any or all of coding from scratch, adapting existing code, integrating code from separate applications and configuring administrative tools in the software.

4. Deliver and host

This may include beta testing the technology and/or piloting with a subset of the larger community.

5. Market

Ideally this does not start and end with the launch of the system and involves bi-directional communication, using all available opportunities to collect audience feedback.

6. Welcome members

This may include orientation, training and encouraging existing members to support and promote a welcoming environment.

7. Sustain, audit and (eventually) de-commission

Outcomes should be monitored and managed on an ongoing basis. But there is a natural lifecycle to most communities. Eventually, they outlive their usefulness and should be de-commissioned. This involves a number of considerations including closing contracts, archiving content and appropriate provisions for personal information.

“How to Kill a Community in 10 Easy Steps”

Based on observation of online business communities, this blog post from 2009 provides additional perspective and an opportunity to end this report on a light, if ironic, note.

Source: <http://socialmediatoday.com/vanessadimauro/113904/how-kill-community-10-easy-steps>

- 1) **Launch your community without a beta group.** Do not involve users in the design of the community under the auspices that you know better than they do what they want. Just design the features and functions without them and assume they will like it.
- 2) **Throw feature-spaghetti at the wall and hope something sticks.** Add as many new and cool features to your (business) community and clutter it with bells and whistles. Business people love to learn lots of new tools (not).
- 3) **Don't "feed" your community once it is open.** Fill it with people by marketing the heck out of it and just see where things go. Assume the members will do all the work from the start and they don't need content or assistance after they have joined.
- 4) **Don't use off-line outreach and engagement techniques.** Just wait for people to post messages and then moderate them without endeavoring to engage people behind the scenes to help them post messages and participate.
- 5) **Assume size is THE critical differentiator.** Fill your community with anyone and everyone regardless of their role or function. If they have a pulse they are welcome and it doesn't matter if there is a cohesive goal for the group to collaborate.
- 6) **Try to monetize the community at every opportunity.** People like to be badgered with micro-payments and teasers when they are in a community setting. Abandon a business strategy or never develop one and just give people lots of opportunity to pay for access and content at every turn.
- 7) **Hire any staff who are on-the-bench to moderate the community.** Any underutilized employee will do regardless of whether they have the expertise to facilitate knowledge-sharing or not. Heck, this will give them something to do.
- 8) **Don't have a newsletter or steady, predictable communication to members.** Assume they will want to visit your community during their busy work day and remember to do so independently.
- 9) **Don't evolve the community based on member feedback and suggestions.** Believe when you launch the community your work is done. Go tell your investors and executive team the community mission is accomplished as soon as the site is up and running and don't look back.
- 10) **Measure meaningless metrics that make you look good.** Number of posts (include all those "me too" messages to bump up your numbers), number of members (regardless of their engagement or visit frequency) all can make you look good without ever really surfacing whether the community serves your business and customers well.

Appendix: Survey Comments by Theme

Question 10 – Online spaces used to share and seek information

Email related (12)

- Email (8)
- Listservs (3)
- Professional newsletters (1)

Extranets (6)

- AMSSA (3)
- MIIO partners and soon an MIIO extranet
- Orientation to Ontario - Discussion forum, unspecified.

National websites (26)

Government run portals (13)

- CIC portal (11)
- Other GOC portals (2)

Government run communities (2)

- Information and Orientation Community of Practice (1)
- IQN (1)

Non-profit run portals (5)

- LIP website (2)
- Integration-Net (1) -no longer funded?
- CCR - Canadian Council for Refugees (1)
- MPI - Migration Policy Institute (1)

Non-profit run communities (6)

- Tutela (4)
- Pathways to Prosperity: Canada (2) p2pcanada.ca

Provincial websites (29)

Government run (8)

- Provincial government portals (8)

Non-profit run portals and communities (21)

- OCASI portals and services (17)
- WCI-Welcoming Communities Initiative (2) - Ontario - no longer funded?
- TÉÉOntario.ca - Travailleuses et travailleurs d'établissement dans les écoles (1)

- CERIS – The Ontario Metropolis Centre (1)

Local websites (6)

- Local portals (4)
- Own website (1)
- York University (1)

International websites (1)

- US NGO: BRYCS -Bridging Refugee Youth & Children's Services (1)

Unknown websites (1)

- Unspecified websites (1)

Open Internet (5)

- Google (1)
- Social media: LinkedIn, Facebook, Twitter (4)

Miscellaneous electronic (5)

- Live Help Chat (1) - no further information
- Unknown electronic (4)

Question 11. Reasons for not sharing

(only 15 of 84 responded to this question, implying that most share. Among the other responses is a strong indication of seeking rather than sharing information.)

- Lack of time: 13.3% (2)
- Not allowed at work: 6.7% (1)
- No relevant place to post: 20.0% (3)
- Worried about privacy: 13.3% (2)
- Other: 60.0% (9)
 - Not my role.
 - We take advice from our local contacts and network
 - I normally find the answers on the respective departments websites or by directly calling the departments.
 - Need to explore
 - Has not been the practice of the organization.
 - No place on line to ask for information
 - I communicate directly with other LIPs via email and phone. An online community for LIPs would be extremely helpful.
 - Not able to post online on behalf of the department
 - Très peu de choses concernant les demandeurs d'asile en attente et très peu de choses concernant ces demandeurs d'asile reconnus comme personnes protégées

Question 19 – Comments about barriers

Time (43) e.g.:

- We are maxed out with client service.
- lack of time due to clients and case management load.
- but that being said the benefits outweigh the barriers
- As Managers, our time is always challenged by many different players and aspects.
- Work load
- possibly scheduling issues
- resources
- The difficulty of managing the day-to-day demands of settlement services present little time to engage in these types of discussions.
- staff not allowed to spend time online

Technology (13) e.g.:

- Technology has to be easy to use
- familiarity with the technology and software.
- Different levels of knowledge in IT.
- technical resources.
- technology barriers
- technology skill-level of participants
- limited internet available per agency
- frontline workers need to be trained.
- In Northern Ontario we have certain areas that are dark spots as far as gaining internet access. I can understand the cost effectiveness of community of practice but still all in all sometimes face to face meetings are the best.
- Lack of knowledge and appreciation of online tools.
- Organization do not invest in upgrading staff skills.
- ...technology literacy...

Reluctance to share (15)

- Confidentiality, privacy, attribution, administrator
- client discouragement or boredom
- participants may need to overcome their own fears/hesitation to posting questions online to all their peers
- Willingness to share info among groups (differing views even though we are providing many of the same services);
- Lack of internal guidance regarding what is appropriate to share, demonstrated value.
- We are a small group. We raise all our funds ourselves. We would be glad to share, and have, with other similar groups but I think you are talking about big organizations that are government sponsored and we are very 'little'.
- Reluctance to share that may be driven by somewhat of a concern for recovering costs of development, A reluctance on the part of some persons, SPO or governments to use something that they did not develop.

- People are more inclined to obtain information online rather than share information they have.
- fear that comments will be viewed by managers/funders & have negative impacts, sense that I may not have enough knowledge, experience, or critical perspective worthy of sharing with others, intimidated by knowledge or attitudes of others.
- The funder looking over my shoulder
- The perception that it's just a way to save money
- The perception that it's just a way to broadcast government information
- staff worried about giving away info to the "competition"
- Privacy issues
- ...Best practices are proprietary business information in a competitive funding environment...

Promotion (1)

- The community of practice needs to be well advertised, needs a buy-in from EDs of organizations (so, they could ensure the use of the resources is a part of day-to-day operation of staff), and

Accessibility (4)

- Any other online tool must be easy, to the point and met the specific need identified
- For frontline workers, the challenge may be that they may not necessarily be in office type of space and hence may not have regular access to email. Time zones may also be a barrier if a webinar is outside the time zone.
- Needing to log on somewhere to check for new information. Additional tasks.
- Remembering logins and passwords.

Language barriers (1)

- Language barriers

Professional development disconnect (1)

- Lack of connection to professionalization

Relevance, usefulness (10)

- Appropriateness of the topic to stimulate on-line discussion, quality and credibility of the contents and contributors
- Any other online tool must be easy, to the point and met the specific need identified
- structured dialogue, relevance of participation to daily work
- The relevance of the information to our jurisdiction. Lack of nationally recognized and sanctioned programs that are vetted and meet all of the needs of the various jurisdictions. Lack of a settlement portal that jurisdictions could use to host best practices and examples.
- Timing, scheduling, workload. Must perceive that we will have an immediate return on investment - although being prepared/proactive is important, information available through online community of practice must be information that we believe we must have now. Not information that we think we will need or benefit from sometime in the future.

- relevance of information - many settlement documents and research reports are metropolitan in nature and rarely cover the best practices for rural areas. I think a section or interest group of rural players would be crucial for my participation
- Buy in and usefulness..whether the online area/forum is able to adapt to community's needs over time.
- Perception of potential benefit (Return on Effort)
- On-line spaces being inactive. Nothing to contribute.
- no barriers but is more on the need to have one

Managing the diversity of groups, purposes (5)

- Clarity of the issues
- Homogeneity of the group
- Each province has its own regulations and guidelines. It has been helpful using these resources but there is often nothing similar in place in our city or province. Many of these resources are only open to their own residents and from outside the region we can only look on.
- Relevancy...I would be interested in learning from others involved in community based planning as opposed to front line settlement work.
- Wide variety of work types and content goals

Online competition (1)

- There are so many that it is difficult to find the best one to participate in

Face to face alternatives (2)

- It is challenging to log into a website and keep updated on things. In person professional development and networking is more effective.
- Online community spaces would work best for folks who are already working together and have shared plans. Without the incentive of following work in progress, time limitation would likely be a real barrier to participation.

Expectations of a “one stop shop” for information (2)

- In addition, ideally, it would have links to all the resources that settlement professionals currently use or could have used (211, Settlement At Work, etc.)
- No editing of material, so it might not be true info or good advice. 2 editing online material is not good use of CIC funds -- will always be out of date. And there is already integration.net funded by CIC don't start a new forum.... I don't think this is a needed enhancement -- will be either too random or too costly to be of value.

Need more info (2)

- I would like to know more about the Online Community of Practice before I would be able to comment on this.
- I would like more in attending training session.

Question 20 – final comments

Needs, purposes

Practice improvement and professional development (19)

- I think that a convenient, non-intimidating, non-invasive, online community for sharing information and ideas to help us provide better settlement services and support is a great idea.
- Good move, educational, informative, conserve resources
- "It is a great idea - will help develop capacity of staff who work with newcomers as they learn from each other
- I really have none as I do not know how this operates. If this is for me, the instructor, that works with its clients and knows the client personally, then I say yes. If this is for me and other instructors, I say yes. If this is for strangers to work with clients, then I say no.
- Good opportunity for mentoring and knowledge exchange"
- I think it would be worthwhile and helpful, if utilized in the way it is intended.
- It would be a good place to ask questions, exchange ideas and share experiences for those involved with immigrant services.
- This may be an ideal process to ensure best practices are shared.
- I'm not sure how much I would use it but it would be helpful when needed. Overall I think there is a lack of qualifications in the settlement sector and professional development is needed.
- It is enriching and possibly one of the better and economic ways of getting promising practices from other regions.
- Attended several webinars on various topics. Visit www.settlement.org frequently but usually just check the updates or news.
- "it will be great if settlement agencies can share their best practices e.g. on how to attract/what programs to attract more clients to their services, how to best reach out to clients, how to provide quality services to clients.
- I think this is an excellent idea. I do maintain working relationships with other rural LIP Managers, but it would be time-saving to be able to read about what they are working on in other rural areas of Canada on my own time. I think we should be able to connect with the person who posted information in the online forum and create a space where we could live chat as well. These are all cost saving measures as well, reducing our long-distance calling overall. It might be interesting to have each contributor create a profile so that we could learn more about the person/organization making the posts before approaching him/her for further information. I hope this initiative will be an interactive tool for our innovative thinkers to share and our highly experienced talent group to advise and reflect.
- to help all settlement workers to be on the same page
- "Would like to see a provincial network set up whereby individual components within the settlement sector could discuss issues of importance on a quarterly basis.
- A forum for sharing best practices and challenges with ever changing policies and immigration trends.
- Fostering mentors/mentees

- Aligning to professionalization efforts without turning it into a compliance exercise"
- It would be great to have an online settlement community where we can learn from each and share resources for best practices...

Performance support (6)

- ...and could even potentially be used for referrals (moderators need to make sure that clients' data is not shared online).
- I think some form of online communication / sharing / discussion tool will be vital to settlement service providers as we move ahead to modernize settlement services and delivery.
- This tool will enable immigrant serving Frontline Workers to share best practices, gain knowledge and find resources quickly to provide quality services for clients.
- A very efficient way to have answer/suggestion to your questions."
- It is very interesting approach .you can get information from the experts .
- ...We can also share information regarding available programs to make referrals easier.

One stop shop for information (6)

- We need to be able to have information available online that covers all areas and concerns. We need to know specifically what each organization does and what services they are able to share. Other provinces have information and programs we don't have. Is it possible to get access to them?
- "This is a great idea for those that find it difficult to connect otherwise. It could be a common place to FAQ's and good ideas that others can learn from. The information needs to be actively monitored and moderated to maintain the credibility and relevancy of the site.
- This needs to be identified within the national framework for settlement as one of the initiatives to ensure that best practices are provide to all jurisdictions. If it is put in as part of the national framework then utilization of this tool could assist smaller communities to access information and programs.
- Sounds like a good idea. It would be good to have a place to share information.
- We need more resource people that we can communicate with directly and frequently. The CIC agents are not always familiar with the live-in caregiver program. Procedures change, we advise our members accordingly but if we could receive up to date information from CIC that would be great. We currently have to refer to the website and hope that we find the changes when they occur (new forms, etc)
- "- Easiest and quickest way to get/share information.

Research and policy development (2)

- ...It would be a great space for academia to conduct research and share findings. In addition, it could be a great space to share professional opinions and info by settlement professionals...
- It is good endeavor, but need is to bridge the gap between the policy and programs

Success factors

- The success or failure will decide on the details of the setup and implementation. It could be useful but uncertain. ..

Driver: online world, benefits of virtual (9)

- It would be useful for smaller jurisdictions that may be constrained by limited resources.
- Fantastic idea. It's been tried before in our sector and hasn't really worked, but I think the timing is better for this idea now that more and more of us are using the technology in our personal and professional lives in more seamless ways...
- "Flexible time of service (self-studying)
- No travel needed
- Can serve remote clients
- More confidential for client
- Online workshops can accommodate more people
- Saving space (interview room, rent, etc.)
- Saving paper and office supplies"

Driver: Tutela as a model for success (4)

- It would be helpful to have a resource like Tutela, relating to settlement topics for us!
- I think it's a good idea to have a place to share and ask questions. Tutela.ca is a great resource for language and a similar tool for settlement would be beneficial.
- ...My understanding is that the ESL community of practice - Tutela - is thriving and it would be great to try to replicate that success.
- Great idea, Tutela is useful and would be nice for settlement practitioners to have the same type of access and networking opportunities across the country

Facilitation (5)

- It's a wonderful idea! The important thing to consider is that frontline workers have little time to keep updating data online or offer advice to others, etc., thus, the community of practice needs to be supported by staff/moderators who would ensure the info is updated and forums are active...
- "It is a good idea to have an on-line settlement community of practice. It must however be animated by dedicated resource who put in motion collaborations and shared plans across the sector. This resource would also solicit participation, reflection, and build relationships between organizations.
- ...Would need some great facilitation and encouragement from site owners. Lots of potential, so glad that you're considering something like this for our sector...
- Would also like to see a provincial coordinator to assist with this service."
- "Would need to have a number of ways to contribute. Would have to be ok with a lot of centralized data collection and would need dedicated outreach staff to assist with encouraging data sharing. Could do well with webinars and other quick win training services.

Promotion (1)

- "Promotion is important, for the launch and over time.

Technology, Accessibility, User experience (6)

- It needs to be easy and fast.
- It must be: Easily accessible, Engaging...
- easy to use, will not email me all the time

- Sounds good, especially with cost but it does have a few pitfalls such as rural internet access.
- Listserv in Toronto torontointerlipnetwork@googlegroups.com has just the right amount of activity. Not annoying or filling your e-mail box all day. Used for useful information sharing and key questions mainly. Probably 2-3 e-mails per week.
- Consider iterating your technical solution as the online tool develops over time, and as you gather information about the sector and their needs.

Relevance, usefulness (4)

- ...To the point, meet the needs of the group"
- Need to be sure it remains relevant and active.
- Sounds like a great idea, just not one that's of sufficient direct relevance to my daily work.
- I will read and share relevant information with our committee.

Managing the diversity of groups, purposes (6)

- It can be accessed by multiple participants/groups
- Currently, the LIPs are uniquely positioned to act as catalyst for an on-line Settlement Community of Practice."
- I think any way of sharing information is great; but it needs to be focused for specific audiences. Too general information does not hit the mark, it needs to be useful in the daily work of practitioners
- An online service would have to have a specific focus and structured discussion in order to be useful. Sharing of general settlement information is not helpful.
- Important to identify/define what a "settlement community of practice" is. Because Local Immigration Partnerships do not provide direct service, we may not identify with this title.
- Finding different ways of reaching different people.

Barriers

Time constraints (3)

- As per last answer. It is a good idea, but time constraints will make it difficult to participate in fully
- It's a good idea but from the smaller settlement agency point of view it will be difficult to find the time to participate effectively.
- It must be in simple English and accessible to the front line staff. It should not be time limited. Webinars require that time is set aside to participate at a specific time. It could be at a time when clients may be in need of assistance.

Reluctance to share (1)

- Unfortunately, CIC raises the target of numbers of clients to all the settlement agencies, so the settlement agencies are competing for the numbers and kept the best practice/what works with themselves."

Online competition (3)

- Hopefully not a duplication of existing ones and as it comes from the main funder, maybe an opportunity to discuss trends and issues due to and when policies changes.
- ...Also, there are existing online tools to do this for NFP settlement agencies (run by OCASI).
- I am still new to the sector and often go the settlement. org for updates regarding ongoing or new bulletins.

Face to face alternatives (2)

- I would prefer to see the federal government go back to working groups for LIPs. We were just getting started and then it stopped. While an online community is great, I think that there needs to be structures in place first, and the online community is a tool used to achieve targeted outcomes.
- Integrating with other efforts: f2f conferences, local meetings, etc.

CIC role (3)

- I think that Tutela works because all language training providers were required to sign up and they know they can go there to find information. Tutela is even stipulated in the Schedule 1s of the agreements.
- If this community of practice for settlement is going to take root and become an important online meeting place for all settlement providers, it may require direction from CIC to join. Otherwise many agency staff will claim that they are too busy and don't have time to keep up with it."
- Having government documents and forms available will make it a popular destination. But making the government a major part of this will stifle any type of spontaneous communication and collaboration. To flourish the CoP needs to be seen as a safe place. Having it embedded as a government tool will ensure only a few very confident souls will post."

Unclassified (8)

- Thanks for the opportunity to provide input.
- No further comments at this point.
- Good initiative
- it is easy to fill
- I think, it is a very good initiative.
- not sure
- Very much needed
- Not valuable unless it's too expensive.