

The background of the entire page is a solid red color. Overlaid on this is a faint, semi-transparent image of a hand holding a large maple leaf. The hand is positioned at the bottom left, with fingers gently gripping the base of the leaf. The leaf itself is spread out, filling much of the upper and middle portions of the frame. The overall aesthetic is clean and professional, with a strong color palette of red and white.

**WE *Value* Partnership**

Settlement success. Together.

# Year in Review

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**2022-23 Fiscal Year**

## ACKNOWLEDGMENTS

We would like to thank everyone who contributed their time, ideas, and expertise to all the work reviewed in this document.

Thanks are also due to the Department of Immigration, Refugees and Citizenship Canada (IRCC) for their financial contributions in making the WE Value Partnership possible.

We would like to acknowledge that the land on which the Windsor-based team lives and works is the traditional territory of the Attawandaron (Neutral), Anishnaabeg, and Haudenosauonee peoples and on the Traditional territory of the Three Fires confederacy of First Nations, comprised of the Ojibway, the Odawa, and the Potawatomie. Our Leamington-based team is on land and surrounded by water that is the traditional territory of the Caldwell First Nation. Our Ottawa-based team is on un-ceded Anishinabe Algonquin territory.

We recognize and respect the First Nations who have been stewards of this land since time immemorial. Our acknowledgement of the land is a declaration of our collective responsibility to this place and its peoples' histories, rights and presence. We commit ourselves to learning more so that we can be partners in stewardship and reconciliation.

To learn about the Truth & Reconciliation Commission's Calls to Actions and the progress in responding to them, we encourage readers to follow this [link](#).

## HOW DID WE DO?

We invite your feedback on all publications produced by the WE Value Partnership.

[wevalue.ca](http://wevalue.ca)

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The views expressed in this document do not necessarily reflect those of the Government of Canada.

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# BIDDING FY2 FAREWELL

**May 24, 2023** – Another year has come to an end, and we have so much to be thankful for on this journey together. We would like to express our sincere appreciation and thanks to all those who have participated in the WE Value Partnership since its start in 2018. Our team's collective effort and the work that we have accomplished to date continues to reflect an evolving sector, driven by professionals and clients creating connections and working together.

We have a variety of great updates and significant milestones achieved within the WE Value Partnership ecosystem and our IRCC-funded Service Delivery Improvement (SDI) projects. In the following pages, you'll learn about how we:

- Transitioned our system to a multi-agency database architecture, enabling the expansion of WE Value into diverse communities
- Developed a user-centered Client Portal application
- Are using Artificial Intelligence to support both clients and staff
- Introduced a variety of new features across K2 and the Partner Portal to help produce better outcomes

**83%**  
Increase in  
assessments  
completed from  
last year

**13,262**  
Settlement Actions  
recommended

**30%**  
Referrals to WE  
Value  
from service  
providers

87% of these  
had referrals  
through the  
Partner Portal!



# Strengthening Assessments. Creating Efficiencies.

WE Value supports newcomers having essential knowledge and awareness of community resources available in achieving their settlement goals. In response to valuable input from our partners, feature improvements have been implemented to improve Activity-based referrals to the Partner Portal. This will enable us to make precise and timely referrals, the right referral at the right time, to the detailed level the Partner Portal allows. The table below provides the distribution of referrals across goal objectives, presented as percentages.

Goal Objective	Organization	Program	Activity	Total Partner Portal	Non Affiliated
Basic Needs & Safety	33.3	66.7	0.0	0.5	2.8
Community Services	30.3	67.5	2.2	2.3	2.2
Education	15.4	75.6	9.0	12.4	15.4
Employment	17.2	75.9	6.8	14.8	9.8
Family Environment	19.3	74.5	6.2	2.6	0.9
Financial	16.1	82.2	1.6	4.7	3.4
Housing	22.0	76.5	1.4	6.0	7.0
Income	25.5	73.9	0.6	1.4	1.8
Knowledge	16.5	65.8	17.7	29.0	2.0
Legal	21.4	75.8	2.7	3.1	1.9
Personal health	22.5	64.1	13.4	11.2	18.1
Social Connections	19.0	76.6	4.5	6.5	5.0
Transportation & Mobility	22.7	60.6	16.7	5.5	29.5
<b>Total %</b>	<b>18.7</b>	<b>70.9</b>	<b>10.4</b>	<b>100.0</b>	<b>100.0</b>

The Settlement Plan serves as a roadmap, identifying the resources and services that can assist a client in taking action to achieve their settlement objectives. In the table below, the We Value Settlement Plan outcomes is represented by an increase of newcomers connected to the appropriate services to support with the immediate settlement objectives.

Immediate Settlement Objectives	Resources in form of referrals
Increase knowledge of Community & Government Services	21.98%
Increase access to local community services	11.08%
Increase knowledge of Life in Canada	10.06%
Improve Other Skills	10.28%
Increase knowledge of Working in Canada	9.37%
Increase knowledge of Education in Canada	7.18%
Improve Language Skills	6.57%
Increase level of community involvement	5.48%
Health/Mental Health/ Wellbeing	3.72%
Financial	2.87%
Legal information and services	2.37%
Increase professional network	2.19%
Family Support	2.25%
Housing/ Accomodation	2.24%
Community Services	1.55%
Food/Clothing/ other material needs	0.82%
<b>Total %</b>	<b>100.00%</b>

# What's new with K<sup>2</sup>?

Throughout this document, you will see references to the "new org" of the K2 Pathway to Settlement System.

Over the past year, significant work has been done to make it possible to introduce new updates and features faster. This involved replicating the entire K2 Pathway to Settlement System onto a new deployment on the Salesforce Platform that is independent from the previous entity. This opened doors not just for what was possible in for our current projects and initiatives, but for how the system can be used to support clients and service providers for years ahead!

## Unleashing Innovation

With K2 now operating on an independent org, the WE Value Partnership is further enabled to develop, test, and implement innovative features. K2 user feedback can be now swiftly and effectively leveraged leading to enhanced user experience and ultimately better outcomes for clients settlement and integration.

## Multitenancy

One of the significant opportunities that the new org provides is multitenancy within the K2 Pathway to Settlement System. Multitenancy is the ability for multiple organizations to share secure and coordinated system access.

With the launch of the new org in Spring 2023, we are proud to announce that host organizations across Canada will have the ability to introduce WE Value to their own communities. This initiative begins with South Essex Community Council (SECC) in Leamington and the YMCA of National Capital Region (YNCR) in Ottawa. Our amazing partners at SECC and YNCR have eagerly anticipated the launch of the new org to begin using K2 for service delivery. This includes offering their clients WE Value Settlement Assessments, developing visionary settlement plans, and collaborating with regional partners through the Partner Portal. A key goal of multitenancy is to support facilitating secure client file sharing between agencies while using the full suite of settlement tailored tools.



## French Translation of K2

For several years, the WE Value Partnership has been collaborating with Immigrant Services Calgary (ISC) to implement and adapt the K2 Pathway to Settlement System to power Gateway, the collaborative approach to settlement assessment and referral services in Calgary. As we also strive to support the Francophone Immigration Pathway, WE Value has been working with Gateway and their partner La Cité des Rocheuses, to translate client- and partner-facing assets into French. This work also contributes to overall multi-lingual capabilities in K2.

Currently, the Capacity-Focused Initial Needs and Assets Assessment, Settlement Plan, and its related Capacity and Social Determinant of Health summaries are all available in French. The next steps include the translation of the Partner Portal and other partner-facing resources, scheduled for implementation in Summer 2023.

### DID YOU KNOW?

The Francophone Immigration Strategy is an IRCC initiative that aims to achieve 3 main objectives to support the vitality of Francophone communities:

- 1** Increase Francophone immigration to reach a target of 4.4% of French-speaking immigrants outside Quebec by 2023.
- 2** Support the successful integration and retention of French-speaking newcomers.
- 3** Strengthen the capacity of Francophone communities.

Learn more about the [Francophone Immigration Strategy](#).



# SERVICE DELIVERY ADAPTATION

## REPLICATING THE MODEL

As we prepare to launch our new K2 org, which will enable service delivery to begin in Ottawa and Leamington, our host organizations, YNCR and SECC, alongside YMCA of Southwestern Ontario (YSWO), are assessing service adaptation needs. "At the South Essex Community Council (SECC) in Leamington, we are excited to begin offering the WE Value Settlement Assessments to our clients", says Karen Marchand, WE Value Project Leader, "as well as pilot the Client Portal to assess the effectiveness of digital service delivery in our community".

In addition to system training, community engagement, partner outreach, creation of new promotional materials, and Motivational Interviewing training, each organization has been reflecting on some very important questions as they work towards preparing for the launch date:

*How do we adapt our service delivery model to align with the "WE Value way"? Inversely, how do we adapt the WE Value Settlement Assessment questionnaire and the various functionalities of the K2 Pathway to Settlement System to meet our regional needs? Which settlement actions should be added to the available list in the referral builder to reflect the opportunities in our community? How do we prepare our staff (including frontline, administration, and IT) to use the new system and adopt new procedures and practices? How do we physically optimize and prepare our space to provide clients with the best experience when they come in for their WE Value Settlement Assessment? How do we build capacity to support the adoption of WE Value and K2?*

The teams at SECC and YNCR are working diligently to identify the best practices as they implement and iterate on WE Value for their communities. Their work enables us to test this approach in rural, urban, and metropolitan communities and build a blueprint that we hope will guide other organizations in adopting this approach.



# Evaluation

## Creating a More Robust PMF

In order to effectively track aspects of the Service Delivery Improvement projects, including comparison between control and experimental groups, goals and outcomes, and impact/outcome metrics the WE Value Partnership engaged KPMG as our evaluation consultants to help us develop a set of tools, methodologies, and metrics.

Our team worked closely with KPMG over four phases: 1) Information Gathering, 2) Current State Framework Assessment, 3) Development of Future State PMF, 4) Final Report & Training.

The PMF was built on analysis of prior data and validated the relationship between driving statements, objectives, and actions. Thus, we demonstrated the fit of the schema to the overall objectives of settlement in the IRCC logic model. This helped us strengthen our NAARs through refining our questions, which creates efficiency through standardizing referral protocols. Overall, this analysis has worked as a proof of concept for our model.

The current state evaluation framework satisfied IRCC funding requirements and enabled the validation of both the client portal and the AI project's impact on newcomers for their settlement process in Canada. An additional set of 17 recommendations was made to refine the existing evaluation framework as a foundation towards WE Value's ability to monitor and proactively report on the successes of the client portal and AI projects on newcomers to Canada. Among these recommendations were AI-specific recommendations, general recommendations, and PMF recommendations that were classified as either "quick wins," "strategic investments," "long-term initiatives," and "nice to haves."

A final report was submitted to our team in July 2022, and we will continue to work with KPMG intermittently throughout the project for support in reporting and project evaluation.

### What is a PMF?

A **Performance Measurement Framework** is a tool that captures the outcomes the project is aiming to achieve and the way success will be measured - to ensure evidence is properly collected to support future IRCC Settlement Network policy recommendations.

See: ["Policy on Results: What is Evaluation" from Canada.ca.](#)

# CLIENT PORTAL SDI



The WE Value team has spent the past year working on the design and production of a client-facing web-based app which will provide newcomers self-directed access to their information in K2. This innovative tool offers the ability for clients to view their settlement plan actions and referrals, update and connect to a settlement worker on their referrals, explore action-focused resources, and connect to local service providers powered by Partner Portal information.

The Client Portal is the focus of a Service Delivery Improvement project, funded by IRCC, that has an emphasis on a user-centered approach. This has been made possible through several rounds of consultations to ensure that the portal meets the needs and preferences of clients.

We are excited to announce that our developers, Techshare, have completed building the first version of the application. We are looking forward to a Summer 2023 launch, at which point we will be testing the app with a group of clients across three communities: Windsor, Leamington, and Ottawa.

# Client Portal Development & Launch Timeline

<b>December 2021</b>	<b>Client Portal Service Delivery Improvement Began</b>
<b>March 2022</b>	<b>Preliminary Consultations with Client Focus Groups</b> This included facilitated conversations with English, Arabic, and Mandarin speaking clients, as well as a group of youth clients. 34 clients total were consulted.
<b>April 2022</b>	<b>UI/UX Design with DevLift</b> Based on clients' feedback, we worked to design mockups for an mobile and desktop tool that would meet client's needs and our project goals while being user-friendly.
<b>May 2022</b>	<b>Mobile Mockup Consultations</b> Clients and staff were given access to the mockups and walkthrough videos to provide feedback. Focus groups with 13 clients, 26 staff. Surveys with 22 clients, 36 staff responses.
<b>Summer 2022</b>	<b>Mockup Redesign and Desktop View</b> Implementing feedback on the mobile mockups, we made significant changes to the designs, and adapted them for desktop view.
<b>August 2022</b>	<b>Client Portal Development Begins</b> Based on the mockups, a list of requirements was sent to our developers at Techshare, who began building the tool on the Salesforce platform.
<b>December 2022</b>	<b>Additional Requirements Handoff</b> Thanks to contributions from IRCC, we were able to submit additional requirements which would allow us to complete building essential features in the tool.
<b>April 2023</b>	<b>Initial User Acceptance Testing (UAT)</b> The core WE Value team was given access to a Sandbox of the Client Portal to complete a preliminary round of end to end testing as development neared completion.
<b>May 2023</b>	<b>Full Deployment UAT</b> The fully built Client Portal will be deployed into the newly created K2 org (which allows for multitenancy with SECC and YNCR) for full User Acceptance Testing.
<b>June 2023</b>	<b>Client Portal Goes Live</b> After any bugs discovered in UATs are fixed and feedback is implemented, the Client Portal will be deployed in the K2 Pathway to Settlement System production.
<b>Summer 2023</b>	<b>Client Portal Testing Begins</b> Once all frontline staff are trained to use the new K2 org and begin service delivery on the new system, Client Portal access will be given to eligible clients.
<b>March 2024</b>	<b>End of Service Delivery Improvement Project</b> The Client Portal SDI project is funded until March 2024.



# What did clients have to say about the Client Portal mockups?

Clients played a vital role in helping us refine the mockups to ensure they were user-friendly and aligned with their specific needs. Their valuable input resulted in significant changes to certain elements, including:

## LANGUAGE

Some sections or features were given new names to ensure clarity and better understanding. For example, "My Pathway" was simplified to "Referrals".

## LAYOUT

The layout of some pages was modified to improve the "flow" for clients' scrolling. For example, on the home page, we removed a "news, tips, and fun facts" carousel and relocated "upcoming appointments" to the top of the page for improved convenience and visibility.

## FEATURES

Clients' insights prompted us to completely rework certain features from the ground up. One notable example is the "resources" page, which underwent significant modifications to better meet client expectations.



**Top 5 descriptions of the design mockups according to Clients & Staff:**

**Easy to Use,  
Valuable  
Comprehensive,  
Useable  
Convenient**

**What we learned from surveys, based on the design mockups:**

- 1** 71% of clients would use the app to ask questions
- 2** 83% of staff said that the app will help by reminding clients about appointments
- 3** 79% would like a messaging system direct to their service provider

LEFT: Excerpts from a report we produced following staff and client consultations and surveys on the Client Portal mockups, detailing both the feedback and the resulting design changes - for internal use.



# ARTIFICIAL INTELLIGENCE SDI

Spearheaded by the Computer Sciences department at the University of Windsor, this Service Delivery Improvement (SDI) project is examining how Artificial Intelligence (AI) can enable the optimization of assessments, referrals, and connections to services by Service Provider Organizations as we help newcomers plan meet their needs and achieve their goals. We hope to demonstrate how it can enhance the ability to meet IRCC priorities that benefit newcomers, community stakeholders, and Canada overall.

In order to do this, we are appraising the effectiveness of AI compared to traditional methods in the settlement process, assessing the benefit of sector-informed and tailored tools that utilize AI, and the utility of AI for data analysis. With these goals in mind, the WE Value AI team has been busy developing two Artificial Intelligence-enhanced features for implementation into the K2 Pathway to Settlement System: A settlement action **Recommender System** for use in building settlement plans and a virtual assistant **Chat Bot** to assist clients using the Client Portal application.



**Great news!** We received approval from the Research Ethics Board at the University of Windsor for both of the AI features we are developing.

They reviewed our experiment structure and our security and privacy measures for client data.

This means that our experiment meets their ethical standards and has all appropriate safety and protection measures for clients who participate.

# Recommender System

## Increasing efficiency

The team initially surveyed staff to collect user stories by asking specific questions about pain points in the current K2 Pathway to Settlement System. Questions included: Where would you imagine AI helping in your processes? What we learned is that there are opportunities to be more efficient in the development of settlement plans. When building a settlement plan in the K2 Pathway to Settlement System, frontline staff create a list of settlement actions from driving statements. From this concept, the recommender system was born. With AI, the system will look at the language used and past records of actions associated with that statement and recommends top actions that could support desired outcomes and next steps.

This recommender system serves as an opportunity for staff to learn from the system and for the system to learn from the staff. It is important to note that the decisions remain in the hands of the human. Vulnerable decisions are never given to the AI. Much of the year has been spent developing the recommender system, working with available data and, most importantly, ensuring it is safe. We are dedicated to ensuring we are building trustworthy AI, making it private, explainable, and such that humans are always part of the decision-making process.

Next Steps: Ensuring the user interface is as smooth and intuitive as possible for clients.

AI Recommender Plan

Auto Settlement Plan Name  
Abe Becklin Settlement Plan

Assessment  
A-0000749

Settlement Plan ID  
x001

Owner  
Achini Herath - K2 Admin

Created By  
Achini Herath - K2 Admin, 04/12/2022 12:35 PM

Last Modified By  
Achini Herath - K2 Admin, 06/02/2023 2:30 AM

Related Process Plan Summary

AIPlanProcessTab

General

Access to transportation

Public transportation is available in my neighbourhood

☐ Apply for affordable bus pass

☐ Apply for an Ontario Drivers License

☐ Get a map of the city and a bus schedule-app?

☐ Learn about public transportations and options

☐ Other

I walk to get around

☐ Find a local Driving School

☐ Apply for affordable bus pass program

☐ Learn more about alternative transport, car rental

☐ Attend G1 information session

☐ Other

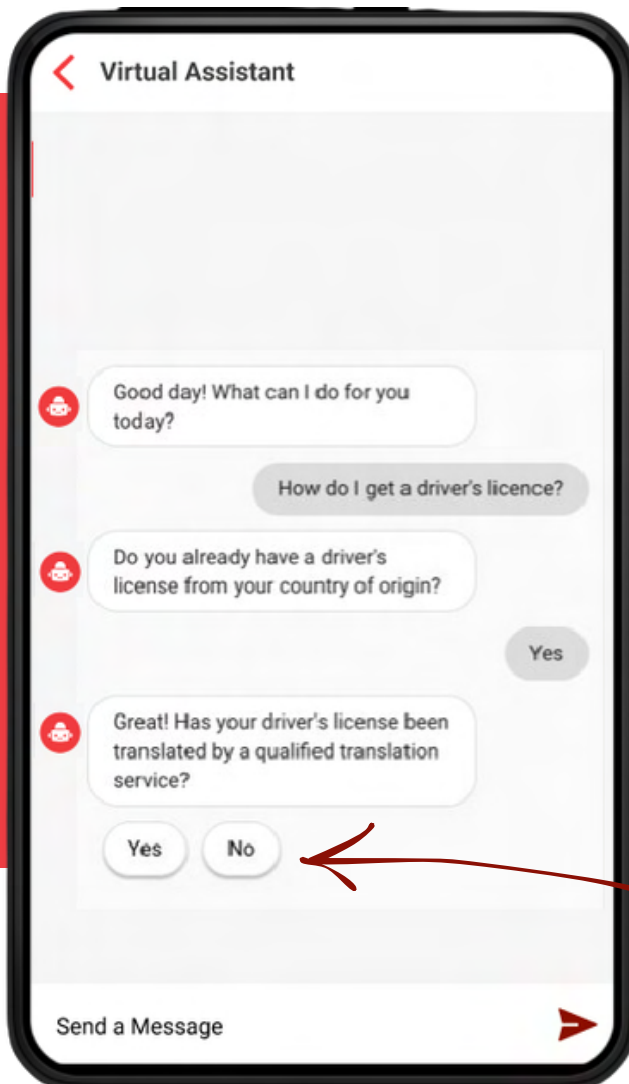
A mockup of the Recommender System. Note: This is not the final UI (User Interface).

# Virtual Assistant

## Increasing Independence

The Virtual Assistant "chat bot" will be integrated into the Client Portal application and give clients the opportunity to find answers at all times.

The initial conceptualization of the chat bot involved having a flow of conversation through constructing a series of questions and answers built manually. This is done by taking the immediate settlement needs in K2 and organizing them in different sections of the Client Portal Resources and building a question-and-answer flow so clients can use the chat bot to guide them to the correct answer they are looking for.



The goal continues to be to have an accessible and secure chat bot. To that end, feedback from staff on the structure and the way the chat bot organizes questions was taken into account.

In turn, Google Dialogue Flow (GDF) was selected to develop the structure of the chat bot. GDF was chosen because the model has the capacity to be able to implement translation in the future, with French translation coming very soon.

Whenever possible, the chat bot will use branching "text bubbles" to facilitate the AI's understanding.



# WE Value in Academia

## At the forefront of innovation

Dr. Farrah Nakhaie, the WE Value Partnership Project Coordinator at the YMCA of Southwestern Ontario, has been working closely with Dr. Ziad Kobti and program graduate students at the University of Windsor's Computer Sciences Department on the Artificial Intelligence Service Delivery Improvement project. Her experience with the AI team, the core WE Value team, and the settlement staff at the YMCA has led her to contribute to several academic articles related to digital innovation in the settlement sector. As strong advocates for knowledge sharing, we are very proud of how Dr. Nakhaie has contributed to these important nation-wide discussions, and strongly encourage anyone reading this document to take a look at what Dr. Nakhaie has to say in the following articles:



### **"Implementing an Artificial Intelligence (AI) Project in Settlement Services Requires an Engaged and Informed Staff"**

by Dr. Farrah Nakhaie

in *Canadian Diversity: Technology in the Settlement Sector*

Published by the Association of Canadian Studies

This article explores how to create team readiness for adoption of new AI tools in a service provider organization and how an informed and engaged staff ensures that AI adoption in settlement is consistent with organizational values.

*Published March 2023*



### **"Human-centric AI - some Immigrant and Refugee-serving sector promising practices"**

by Aimee Holmes and Farrah Nakhaie

on the *Knowledge Mobilization for Settlement* website

Published by Marco Campana on KM4S.ca

This article publishes a series of comments prompted by a "Technology in Human Services" podcast about human-centric AI. Dr. Nakhaie's comments touch on staff's initial fears about AI replacing jobs, on the concept (and importance) of fairness in AI, and raise important questions about the role of AI in our world.

*Published November 2022*

# PARTNER PORTAL UPDATES

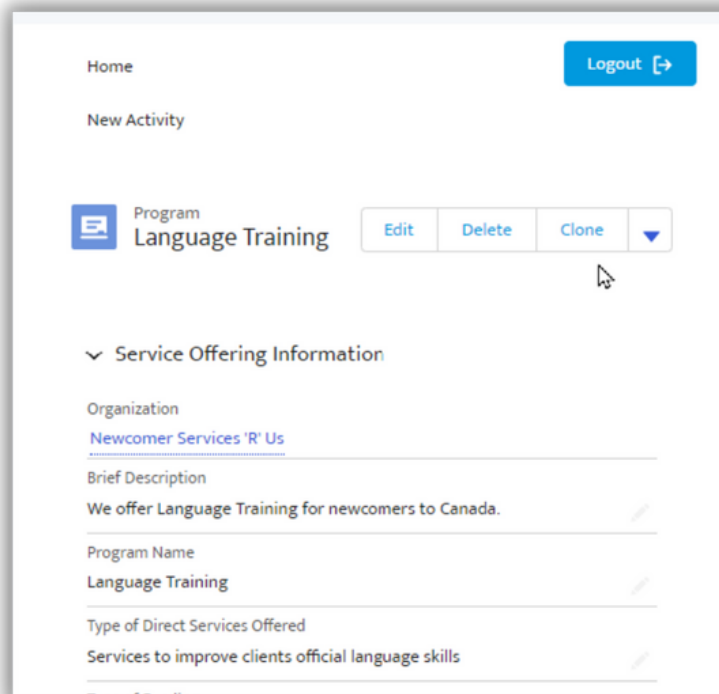
Partner Portal Users will be happy to know we have been working hard to implement some much-anticipated features which will improve processes and support staff and clients. Let's dive into a few key updates that are now available!

## Cloning Feature

"Could we just duplicate something that already exists and change a few fields?"

We heard you, Partner Portal Users! The Partner Portal now includes a cloning feature that allows users to duplicate existing services, programs, and activities with ease. Say goodbye to starting from scratch when creating similar items. With the cloning feature, you can simply duplicate a location, program, or service/activity and immediately make necessary adjustments as needed. This offers a more flexible and time-saving approach for service providers. Enjoy the convenience and efficiency it brings to your workflow!

Happy cloning, partners!



## Referral Comments

Ever wished you could leave comments to the assessor who sent you the referral on behalf of a client? Ever wish they could leave a comment for you so you could better prepare for when the client walks in? Well, we have good news for you!

With the comments feature at the bottom of a referral's details page you can now attach a comment to a referral directly within the Partner Portal, and assessors can leave one for you at the time of referral!

This new comments feature enhances communication and streamlines the referral process, empowering you to provide valuable insights and receive important information within the Partner Portal.

## Automated Referral Notifications

We know, it can be tough to constantly be checking your Partner Portal for new referrals. So, we've got you covered! Partner Portal users now have the option to choose whether you'd like to be notified when a referral is sent your way, or whether you'd prefer a weekly summary email that shows you at a glance all the referrals you got that week. Whatever your preferences, there are options to help manage referrals and your inbox.

At the bottom of the "Organization" page, you can now choose to receive either (or both!) types of automated referral emails. Don't forget to click "save" when you change your settings, and keep an eye on your inbox!

With these options in place, managing referrals and staying ontop of your inbox has never been easier.

Automated Referral Emails and Notifications Settings

Receive Weekly Summary Emails ☒ Yes

Receive New Referral Notification Emails ☒ Yes

Save

# Ongoing Services

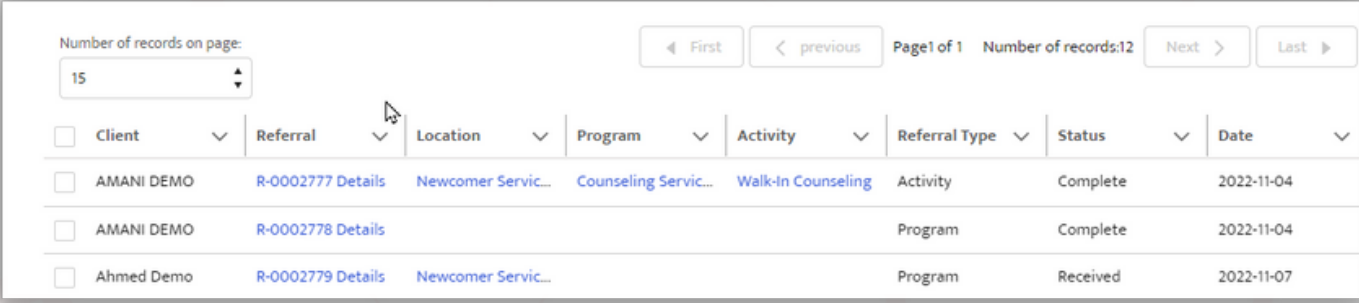
One of the most common service "pathways" for newcomers is through the Information and Orientation program. In fact, I&O is the most widely used service within the Settlement Program ([Settlement Outcomes Highlights Report 2021, IRCC](#)).

Originally designed for the WE Value Settlement Assessment, a protocol is in place for the development of Settlement Plans and Partner Portal access. New changes made to the service recording flow in the K2 Pathway to Settlement System have improved access to the referral process overall for partners. With the changes, the Information and Orientation program will act as a new Needs and Asset Assessment and Referral, and will increase the referral to services among newly arrived newcomers. As a result, Partner Portal users can expect to see an increase in client referrals to join sessions or access services. As part of their Information & Orientation services, settlement staff using the K2 Pathway to Settlement System will be able to make referrals as needed. Driving these changes is the outcome goal of increased understanding of client settlement needs and appropriate linkages to other services at the right time that reflect all stages in a client's settlement journey.

## Pagination

Get lots of referrals through the Partner Portal? Great! Unfortunately, sometimes when they all show up on your "All Referrals" page at the same time and it grinds your computer's processing speed to a halt.

This simple feature makes it easier to view referrals by only showing you a certain number of referrals at a time. You can choose how many you want to see and navigate to see more by clicking through "pages".



The screenshot shows a web interface for viewing referrals. At the top, there are pagination controls: a dropdown for 'Number of records on page:' set to 15, and buttons for 'First', 'previous', 'Page 1 of 1', 'Number of records: 12', 'Next', and 'Last'. Below this is a table with columns: Client, Referral, Location, Program, Activity, Referral Type, Status, and Date. The table contains three rows of data.

Client	Referral	Location	Program	Activity	Referral Type	Status	Date
<input type="checkbox"/> AMANI DEMO	<a href="#">R-0002777 Details</a>	Newcomer Servic...	Counseling Servic...	Walk-in Counseling	Activity	Complete	2022-11-04
<input type="checkbox"/> AMANI DEMO	<a href="#">R-0002778 Details</a>				Program	Complete	2022-11-04
<input type="checkbox"/> Ahmed Demo	<a href="#">R-0002779 Details</a>	Newcomer Servic...			Program	Received	2022-11-07



# Elevated View

## Enhanced Visibility for Primary Service Providers

The WE Value Partnership is committed to supporting newcomers as they settle and access services and opportunities beyond their initial WE Value Settlement Assessment.

We are excited to announce that in Spring of 2023, we are launching the Elevated View experience through the WE Value Partner Portal. This new experience will provide opportunities for deeper collaboration and coordination among IRCC-funded organizations by enabling secure digital sharing of essential client details. For clients, and front-line staff, we hope that this streamlines intake processes, enhances overall service coordination, and that it reduces the need for clients to re-tell their stories to their primary service providers post WE Value initial assessment.

Elevated View is established between a consenting client and a participating IRCC-funded organization after the Settlement Plan/NAARs is completed. It grants the Primary Service Provider organization access to comprehensive client information through the Partner Portal. In addition to the basic client information and referral details Affiliated Partners can already see in the Partner Portal, clients can select one or more of any of the following types of information to share with a Primary Service Provider:

- Full **Client Profile** in K2, including personal details and information related to immigration, education and employment history, and language ability.
- All **Client Referrals**, including those made to other organizations and their status.
- **Client Assessment** results, including a summary of responses over 14 categories of settlement and an overview of their identified skills and capacities.

This new collaborative method of service delivery will help us to assess effective approaches to client file sharing to facilitate service coordination. We hope that it encourages transparency, enhances staff decision-making and processes, reduces complexity for clients and communication between agencies, and produce better outcomes for all.

# How does Elevated View produce better outcomes?

From the beginning, the WE Value Partnership has embraced the understanding that collaboration and transparency among service provider organizations are keys to success for newcomers. Breaking down silos between organizations and nurturing ecosystems will enhance clarity, reduce confusion, and make it easier for clients to always access the services that meet their needs.

For clients, Elevated View:

- removes the need to retell their story over and over
- reduces confusion

For Primary Service Providers, Elevated View:

- Provides a deepened understanding of client history, needs, and assets to inform timely decisions

For Other Service Providers, Elevated View:

- results in more accurate referrals
- reduces duplication of services



## From Vertical Integration to Horizontal Collaboration

Instead of working in a hierarchal structure that passes clients through a system, WE Value is working towards a collaborative, all-hands-on-deck, ecosystem that recognizes the roles of each provider and person to support newcomers in achieving their goals and meeting their needs. Elevated view puts the right information in the hands of all players in the ecosystem to allow two or more organizations to engage in joint action.

Elevated View enables us to facilitate value creation for the client and service instead of working around the needs and outcomes ourselves. Value creation, service delivery, and results are collaborative activities among Elevated View members, with strong peer-to-peer relationships allowing value to benefit all ecosystem participants. It provides the opportunity for open innovation and growth.

# Interested in learning more about the Partner Portal?

Contact your local WE Value host organization!!

 Host Organization	Communities	Contact
 <b>YMCA of Southwestern Ontario</b>	<b>Windsor-Essex</b>	(519) 258-9622 ext 2601 500 Victoria Ave, Windsor, ON www.ymcaswo.ca
	<b>Sarnia-Lambton</b>	(519) 328-4792 660 Oakdale Ave, Sarnia, ON www.ymcaswo.ca
	<b>London</b>	(519) 645-7553 ext 1 168 Elmwood Ave E, London, ON www.ymcaswo.ca
 <b>SECC</b> <small>SOUTH ESSEX COMMUNITY COUNCIL</small>	<b>Leamington</b>	(519) 326-8629 215 Talbot St. E, Leamington, ON www.secc.on.ca
 <b>National Capital Region</b>	<b>Ottawa</b>	(613) 788-5001 150 Isabella St, Suite 201, Ottawa, ON www.ymcaottawa.ca

## Already have an account?

Because of the updates, Partner Portal users are encouraged to attend refresher training sessions and update their information so that programs and services are readily available for referrals that respond to the goals and needs of clients no matter where they are in their settlement journey. You can also add/change Partner Portal users for your organization by filling out an [online form](#). Full Partner Portal training is available for new users. Contact your WE Value coordinator for information on upcoming training dates.



# COMMUNITY ENGAGEMENT

The WE Value Partnership would not be possible without the continued support of our incredible community partners. From the core project partners who have worked with us from the beginning, to the newest WE Value host organizations in communities across Ontario, our technology and implementation partners, affiliated partners who engage with us through the Partner Portal, non-affiliated partners who spread the word, strategic partners, and Steering & Evaluation Committee members who provide valuable guidance to our work -- we extend our heartfelt gratitude to all of you!

## Steering & Evaluation Committee

Throughout the last fiscal year, we held four meetings with the WE Value Steering & Evaluation Committee. To reflect our expanding reach in Ottawa, Sarnia, and Leamington, we also welcomed new members from these communities.

These meetings shaped our work by giving our team access to the wealth of knowledge, experience, and outside-the-box thinking that our Committee members can provide as leaders within their fields. In particular, the expertise of our Committee members was vital to honing the design and functionality of our Client Portal application, as well as helping us to keep a human-first approach a priority when exploring the many possibilities of AI in our system.

### Interested in joining our Steering Committee?

If you think your knowledge and experience could contribute positively to our work, we'd love to hear from you! Our committee is a diverse group of multisectoral professionals who are passionate about community.

Email Aaron at  
[afauteux@workforcewindsorsex.com](mailto:afauteux@workforcewindsorsex.com)



# Steering Committee Members

## Past and Present

Thank you to our amazing Steering & Evaluation Committee Members who have shared their time, knowledge, and ideas to shape our work.

<b>Jennie Atkins</b>	University of Windsor - Continuing Education
<b>Nick Beluli</b>	Multicultural Council of Windsor and Essex County
<b>Mary Ellen Bernard</b>	City of Windsor - Social Services & WE LIP
<b>Olivia Brezeanu</b>	Windsor Women Working with Immigrant Women
<b>Carmelo Calcara</b>	Liuna625!
<b>Bob Cameron</b>	Downtown Windsor Community Collaborative (DWCC)
<b>Sarah Cipkar</b>	GECD SB School Board Trustee, formerly with DWCC
<b>Manuela Denes</b>	Essex County Library
<b>Justin Falconer</b>	Workforce WindsorEssex
<b>Marion Fantetti</b>	Invest Windsor-Essex
<b>Jan Foy</b>	Greater Essex County District School Board
<b>Sarah May Garcia</b>	Ontario Health West
<b>Lorraine Goddard</b>	United Way / Centraide
<b>Amani Hassouna</b>	First WE Value Client
<b>Magdiel Hoste</b>	Adult Language and Learning
<b>Masuma Hussaini</b>	YMCA of the National Capital Region
<b>Wilma Lamb</b>	Leamington Area Ecumenical Refugee Committee (LAERC)
<b>Charlotte LeFrank</b>	Windsor Essex Children's Aid Society
<b>Bahaa Lubbad</b>	First WE Value Client
<b>Stephen Lynn</b>	City of Windsor - Social Services & WE LIP
<b>Heather Mantle</b>	Community Member (formerly, Matthew House)
<b>Jessica Marcotte</b>	YMCA National Capital Region, Build ON Pre-Arrival Services
<b>Didier Marotte</b>	Centre communautaire francophone Windsor-Essex-Kent
<b>Melinda Munro</b>	Munro Strategy
<b>Rama Musharbash-Kovacs</b>	Windsor Essex Catholic District School Board
<b>Nil Parent</b>	Community Member (formerly, Collège Boréal)
<b>Katie Pavlovski</b>	Town of Tecumseh
<b>Emilian Siman</b>	Workforce Planning and Development Board Elgin Middlesex Oxford
<b>Anneke Smit</b>	University of Windsor Law & Centre for Cities
<b>Carolyn Warkentin</b>	South Essex Community Council

# Beyond Windsor

## Partner Engagement across Ontario

Looking ahead to the launch of the new K2 org and the Client Portal application, the WE Value team has been steadily engaging new partners across Windsor-Essex, Sarnia-Lambton, London, Leamington, and the National Capital Region.

Newcomers in Leamington and Ottawa will now be able to access WE Value services through South Essex Community Council (SECC) and YMCA of the National Capital Region (YNCR), respectively. This means Service Provider organizations in those areas will have the opportunity to participate as affiliated partners through the Partner Portal.

**"WE Value is a great project that serves as an excellent alternative to other models for assisting newcomers, collecting data, and processing it. I believe that the 360-degree analysis, which offers a comprehensive assessment of newcomers' needs, can help organizations provide better and more customized services by targeting specific issues and generating improved solutions."**

*- Riana, Information Referral Specialist,  
YNCR Newcomer Information Centre*

Some organizations who offer services in Leamington are already included in the Partner Portal because of their work in Windsor. However, Karen Marchand, the WE Value Project Lead at SECC, has brought her and the settlement teams' knowledge of the local community to the project by reaching out to other key local service providers and ensuring everyone is accounted for in the K2 Pathway to Settlement System when service delivery begins.

In Ottawa, the WE Value Project Lead at YNCR has a champion in Satheeka Hettigama, at their Newcomer Information Centre (NIC). To date, 50+ agencies in the National Capital Region have been engaged through a series of "Intro to WE Value" presentations she held during the Winter. These presentations have played a vital role in fostering awareness and building partnerships.

The ongoing engagement efforts in these regions highlight the commitment of the WE Value Partnership to expanding its reach and collaborating with diverse organizations across Ontario to better serve newcomers.

# WE Value in the Community

## Connecting and Contributing

### Metropolis Conference

Three members of the WE Value Partnership team attended the 2023 Metropolis Conference in Ottawa in March 2023. It was an excellent opportunity to connect with other organizations working in settlement across Canada. In particular, the team gravitated towards sessions that revolved around data, digital transformation and technology, and project evaluation. Highlights of the trip for the team were to finally meet (in person!) some of our colleagues at the YMCA of the National Capital Region and see a shoutout to the WE Value Partnership by our partners from Immigration Services Calgary in their presentation about the Gateway Initiative, which uses the K2 Pathway to Settlement System.

### Workforce WindsorEssex Research Projects

Data collected by the WE Value Partnership through the K2 Pathway to Settlement System was used in two reports published by Workforce WindsorEssex in the 2022-2023 fiscal year.



**Newcomers in Agri-  
food report**



**Skilled Trades for  
Newcomers report**

### Committees with WE Value Members

- Windsor Essex Local Immigration Partnership (WE LIP)
- Comité local en immigration francophone Windsor-Essex-Chatham-Kent (CLIF WECK)
- Table de concertation francophone (Franco Info)
- WEST Inc. Empowering Women for Employment Advisory Table
- Orientation & Advisory Committee
- Leveraging Technology in the Immigrant & Refugee-Serving Sector - A Knowledge Sharing Network

# Data Dissemination

## Driving Decision-Making

The WE Value Partnership, along with the Windsor Essex Local Immigration Partnership and Dr. Reza Nakhaie, Professor of Sociology from the University of Windsor hosted the virtual 2022-2023 Data Sharing & Community Consultation events on Tuesday, March 21st, 2023.

The data was collected by the WE Value Partnership through a holistic Needs & Assets Assessment offered by the YMCA of Southwestern Ontario. It was captured through the K2 Pathway to Settlement System and analyzed by Dr. Nakhaie.

Through four sessions, Dr. Nakhaie guided participants on an exploration of data trends across the themes of Health & Mental Health, Education & Employment, Socio-Cultural Integration, and Housing & Neighbourhood. From there, conversation was opened up to explore the relationship between settlement outcomes and the actions included in settlement plans. This concept-mapping exercise helped to gain a better understanding of what settlement plan actions can lead to desired outcomes and which actions are missing that can better support newcomers on their settlement journey.

**“The importance of data cannot be overstated, especially when it comes to local planning and understanding the needs and assets of newcomers who are choosing to make this region their home. Local real-time, standardized, academically viable data is crucial to helping us identify areas where we can improve our services and support for newcomers.”**

- Matthew Dunlop, WE Value Program Manager,  
YMCA of Southwestern Ontario

The data as presented in the events have been formatted into a series of reports which are available at [wevalue.ca](https://wevalue.ca), along with video recordings of the events.



# THANK YOU

As we reflect on the incredible progress made this year, we feel energized and inspired to continue pushing the boundaries of what's possible. With every update and improvement, we are a closer to realizing our vision of a truly inclusive and welcoming Canada where newcomers can thrive and reach their full potential.

We are deeply grateful to our partners, clients, and staff who have provided feedback and ideas to make this progress possible. Their passion, dedication, and unwavering commitment to our shared mission is what drives us forward and fuels our collective success.

The work we've done in the past year includes the contributions of former team members who have moved on to other projects, organizations, or careers. Thank you to Jeremiah Bowers (YSWO), Anil Subasioglu (YNCR), Alessandro Vignando (YNCR), and Edita Lacsamana (YNCR) for all the great work they did while part of the WE Value team, and we wish you great success on your continuing journeys!

We also want to acknowledge and thank the Immigrant Services Calgary Gateway team including Casey Kennedy, Nisha Soundararajan, Daniel Wu, Bruno Rosati, Prianka Gill and the outgoing CEO Hyder Hassan among many others for their deep collaboration and trust as the first adopters of the K2 Pathway to Settlement System. We would also like to thank Hervé Stéclebout, Directeur général, Société la Cité des Rocheuses, for his and his team's contributions to the French capabilities of K2 through the Gateway initiative.

We are thankful for the contributions of our funder Immigration, Refugees, and Citizenship Canada (IRCC) for enabling us to innovate and share our learnings to the settlement sector.

As we look to the future, we are excited to build on this momentum and keep pushing the envelope in service of newcomers across Canada. Through **"Settlement Success. Together"** we can create a brighter and more prosperous future for all.

# WE Value Partnership

Settlement success. Together.

## Core Co-Innovators



## Regional Co-Innovators



## Implementation partners



## Evaluation partners



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et Citoyenneté Canada



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