

*Final Report*

# Knowledge Mobilization in IRCOM's Social Housing for Refugee Families to Build Data Management and Evaluation Capacity

Funded by the National Housing Strategy

Submitted to Canada Mortgage and Housing Corporation (CMHC)

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October 2022

## Executive Summary

In Canada, the Immigrant and Refugee Community Organization of Manitoba's (IRCOM) model is unique. Due to limited resources, IRCOM has, in past years, been unable to track the outcomes of its unique model in a way that produced meaningful findings for its funders and internal operations. This project builds on prior qualitative research (Bucklaschuk, 2016, 2019) and the outcomes of previous work (Zell et al., 2020, 2022) funded by the National Housing Strategy, Canada Mortgage and Housing Corporation (CMHC), in addition to the results from a LIFT Impact Partners consultancy, and an IT consultancy, described below, to gather and analyze data to build a more complete picture of how IRCOM's model promotes positive housing outcomes and settlement success.

## Objectives

The primary objectives of this project were: to hire and confirm all key project members and staff and their roles within the project; to review and synthesize past research results and workshop the development of the seminal document that will guide the project, the Knowledge Mobilization Workplan; to begin the process of knowledge mobilization by building buy-in and understanding for research and its benefits to a housing organization, and on the basics of data collection/ management; to train those team members who are most likely to be actively inputting, managing and analyzing data, in a revised data management system/ framework, developed through the project; to develop a new data management framework for the organization, based on research, best practices, and the needs of the organization; well-researched selection of data management software/ system for use by the organization; following from prior research recommendations, produce a Data Procedures Manual for the staff team; and to implement a new data management system with a trained and ready staff team.

## Methodology

In the context of this project, theories and practices of knowledge mobilization were utilized at IRCOM to communicate and translate into action the planning and research results from the first two phases of this project.

## Findings

In no particular order, the key findings thus far have been: the need for greater coherence and shared learnings about technology in the social housing / settlement sector; the importance of assessing organizational capacity while selecting a database provider, the importance of selecting a database provider who utilizes practices of knowledge mobilization, and the importance of prioritizing staff knowledge in the process of knowledge mobilization.

## Results and Impacts, and Going Forward

While the majority of proposed objectives for this project were achieved, further initial and ongoing training for teams is required, and will be facilitated by IRCOM in-kind. In addition, Data Manuals and Data Management Frameworks will be continually updated. Finally, recommendations for further work include increased collaboration and learnings sharing in the social housing and settlement sectors.

# Introduction

## Context

Recent events, such as the influx of both Afghan and Ukrainian refugees, have once again echoed the fact that few Canadian cities can adequately house large arrivals of newcomers. Refugees and other newcomers face numerous barriers in Canada's housing market, including a lack of affordable housing in large census metropolitan areas, discrimination, language barriers, and a lack of knowledge about the Canadian housing market. These issues often leave newcomer families living in poor and precarious housing, sharing overcrowded spaces, and at risk of being in core housing need (CMHC, 2021, p. 1-2). In comparison to other immigrant-led households, refugee-led households experience lower levels of home ownership, higher incidences of being in core housing need, a higher percentage of affordability problems, and lower rates of finding suitable and adequate housing (Shan, 2019, p. 2). Although it is central to the settlement experience, housing has not been a focus of federal immigration policies and programs. The release of Canada's National Housing Strategy, and its identified priorities, has offered an important opportunity to investigate this problem.

In Canada, the Immigrant and Refugee Community Organization of Manitoba's (IRCOM) model is unique. IRCOM's model provides "robust and holistic services in a family-centric environment that strives to empower newcomers as they settle and integrate into a wider community...by providing affordable, transitional housing with co-located programs and support services," (Bucklaschuck, 2016, p. 1).

This project builds on prior qualitative research (Bucklaschuck, 2016, 2019) and the outcomes of previous work (Zell et al., 2020, 2022) funded by Canada Mortgage and Housing Corporation (CMHC), in addition to the results from a LIFT Philanthropy consultancy, and an IT consultancy, described below, to gather and analyze data to build a more complete picture of how IRCOM's model promotes settlement success.

In 2019, IRCOM partnered with researchers at the University of Winnipeg and University of Manitoba to engage in a CMHC National Housing Strategy-funded research planning project. Due to limited resources, IRCOM has, in past years, been unable to track the outcomes of its unique model in a way that produced meaningful findings for its funders and internal operations. Additionally, IRCOM's strategic priorities included developing a better understanding of the IRCOM model with the possibility of replicating the model in other settings. Research planning activities, therefore, were aimed at understanding how IRCOM was, and could measure its outcomes. Under this project, activities included a series of literature reviews on settlement and integration outcomes and indicators, a review of best practices for data quality and data management, and an inventory of data management practices at IRCOM (Zell et al., 2020). As a part of this project, a series of organization-wide and program-level recommendations for enhancing data quality and data management were developed.

Concurrently, Immigration, Refugees, and Citizenship Canada (IRCC) selected IRCOM to be one of ten organizations Canada-wide to receive a LIFT Impact Partners consultancy. As a part of this process, eleven IRCOM managers created a performance measurement framework for the organization, identifying short-, medium-, and long-term outcomes of the organization's work along with measurable indicators of their 7 outcomes. In addition, access to an IT consultant was provided, who advised the organization to seek a 'single source of the truth', that is, a unified data management system, and who also advised on system requirements and tools required for improved data collection and organization to measure these outcomes.

In August of 2022, IRCOM and their research partners at the University of Winnipeg and University of Manitoba, funded by Canada Mortgage and Housing Corporation, released a further report titled *Evaluating Outcomes for Refugee Families in IRCOM's Transitional Supportive Housing* (Zell et al., 2022).

### *Current Project – Knowledge Mobilization in IRCOM's Social Housing for Refugee Families to Build Data Management and Evaluation Capacity*

The primary purpose of this project was to communicate and translate into action the recent planning and research results, products, and recommendations described above. To complete this project, the lead organization, Immigrant and Refugee Community Organization of Manitoba Inc., received funding from Canada Mortgage and Housing Corporation (CMHC) under the National Housing Strategy (NHS) Research and Planning Fund.

### **Project Objectives**

The primary objectives for this project were stated in the *Contribution Agreement* as follows:

1. To hire and confirm all key project members and staff and their roles within the project;
2. To review and synthesize past research results and workshop the development of the seminal document that will guide the project, the Knowledge Mobilization Workplan;
3. To begin the process of knowledge mobilization by building buy-in and understanding for research and its benefits to a housing organization, and on the basics of data collection/management;
4. To train those team members who are most likely to be actively inputting, managing and analyzing data, in a revised data management system/ framework, developed through the project;
5. To develop a new data management framework for the organization, based on research, best practices, and the needs of the organization;
6. Well-researched selection of data management software/ system for use by the organization;
7. Following from prior research recommendations, produce a Data Procedures Manual for the staff team; and
8. To implement a new data management system with a trained and ready staff team.

This project was proposed to be completed in three phases, further divided into eight tasks:

- Phase 1: Planning
  - TASK 1 – Confirming, mobilizing staff resources
  - TASK 2 – Develop Knowledge Mobilization workplan
- Phase 2: Staff Skills and Knowledge Training
  - TASK 3 – All staff training
  - TASK 4 – Specific team training
- Phase 3: Improving Data Management Systems at IRCOM
  - TASK 5 – Integrating data streams
  - TASK 6 – Researching data management systems
  - TASK 7 – Data procedures manual
  - TASK 8 – Implement data management system

## Methodology

### Knowledge Mobilization at IRCOM

This project operated with the understanding that Knowledge Mobilization, as a practice, should enhance the two-way connection between researchers and community stakeholders in order to allow both research and evidence to inform decisions about public policy and professional practice. This mutual exchange of knowledge, and the strengthened relationship between researchers and practitioners should lead to the co-production of new knowledge (York University, 2021). This knowledge exchange should be mutually beneficial actively benefit society (Harris Centre, 2019).

In the context of this project, theories and practices of knowledge mobilization were utilized at IRCOM to communicate and translate into action the planning and research results from the first two phases of this project. Throughout this project, receiving IRCOM staff's feedback and assessment on research and its accuracy and applicability to their daily operational reality was highly emphasized.

One desired outcome of this mutual exchange is to increase the internal capacity of IRCOM to conduct research and evaluation activities that will allow them to better understand and improve the effectiveness of their wrap-around social housing model and its impacts on newcomer families. In addition to using this information to improving the delivery of their services, IRCOM will be better able to communicate the outcomes of its model to funders, and those who wish to duplicate and learn from their model.

### Schedule of Key Deliverables and Outputs

In this section, an overview of the proposed deliverables and outputs, divided under the 8 tasks, in addition to their status of completion is included. While the majority of planned outputs have been completed, a few remain ongoing, and will be completed using both in-kind IRCOM resources, and the support of founders of CARMIS, the data management system selected by IRCOM as a part of this project.

#### Task 1: Confirming and Mobilizing Staff Resources

Key Deliverables/ Outputs	Date completed	Status
Project team membership confirmed.	September 3 <sup>rd</sup> , 2021	<input checked="" type="checkbox"/>
Project coordinator hired.	October 15 <sup>th</sup> , 2021	<input checked="" type="checkbox"/>
Knowledge Mobilization Working Group, Terms of Reference, and meeting schedule confirmed.	September, 2021	<input checked="" type="checkbox"/>

Additional Activities	Date completed	Status
Meeting held to introduce Project Coordinator to the Knowledge Mobilization Working Group (KMWG) and discuss IRCOM's data needs and current practices.	October 29 <sup>th</sup> , 2021	<input checked="" type="checkbox"/>

Project Coordinator virtually attended various teams' meetings to introduce their role, discuss project and upcoming activities, and lead discussions surrounding how IRCOM's current data management impacts the ability to track and improve services within the context of social housing. In addition, introductory presentations were given surrounding the importance of research and evaluation for IRCOM.	October, 2021	<input checked="" type="checkbox"/>
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## Task 2: Develop Knowledge Mobilization Workplan

Key Deliverables/ Outputs	Date completed	Status
Report completed of compiled/summarized results/products/recommendations from previous research.  The Project Coordinator compiled and summarized the recommendations from previous research and consultancies, including: the report submitted to CMHC titled <i>Addressing the Housing Needs of Refugee Families through Transitional Housing and Wrap-Around Supports</i> (Zell, Carevic, and Hinds, 2020); an external IT and data management review completed in 2019 by IT consultancy company imagenterra; and several internal meetings and strategic planning sessions at IRCOM.	November 31 <sup>st</sup> , 2021	<input checked="" type="checkbox"/>
Presentation completed and workshop held.  The Project Coordinator prepared and presented a workshop to the Knowledge Mobilization Working Group on the compiled recommendations. The relevance and applicability of these recommendations were discussed and incorporated into the KM Workplan and upcoming trainings. During the drafting of the Guiding Principles and Data Manuals and trainings, these recommendations will also be communicated to the wider team	April 1 <sup>st</sup> , 2022	<input checked="" type="checkbox"/>
KM Workplan complete (living document).	November 31 <sup>st</sup> , Ongoing	<input checked="" type="checkbox"/>

## Task 3: All Staff Training

Key Deliverables/ Outputs	Date completed	Status
Two workshops held on rationale for research/data management best practices for 50 staff (25 each):		<input checked="" type="checkbox"/>
Workshop 1: Project Coordinator presented to the Leadership Team, and the Knowledge Mobilization Working Group on research/ data management best practices. In addition, an introduction to past research done at IRCOM, in addition to the research done as part of earlier phases of this project, was presented	December 13 <sup>th</sup> , 2021	

<p>Workshop 2: Project Coordinator facilitated an All-Staff Workshop on the importance of data and evaluation at IRCOM. The purpose of this workshop was to increase staff buy-in for the upcoming data management system, and create a shared sense of importance surrounding evaluation of IRCOM’s model and programming. Additionally, research ethics were discussed in depth. Several breakout sessions were utilized to discuss these topics</p> <p>It was decided by the KMWG that it would be more effective to discuss Data Management Best Practices more specifically with staff as a part of the training they will receive as a part of the new Database Training, to ensure it can be explained and taught practically and “hands-on”.</p>	<p>March 11<sup>th</sup>, 2022</p>	
<p>Informal update by email sent to funder.</p>	<p>January 12<sup>th</sup>, 2022</p>	<p><input checked="" type="checkbox"/></p>

**Task 4: Specific Team Training**

Key Deliverables/ Outputs	Date Completed	Status
<p>Focused staff training developed and completed with those team members directly working on data input / management. 3 workshops, 2 hours each held for 20 -25 staff.</p>	<p>At the closing of this project, the two largest program teams, in addition to one new project team at IRCOM have received in-depth, practical training on data input and management.</p> <p>September 19<sup>th</sup>, 2022 (Employability Project, 1 hour x 1 staff, plus numerous follow-ups)</p> <p>October 12<sup>th</sup>, 2022 (Community Resources Program (CRP), 3 hours x 8 staff)</p> <p>October 6<sup>th</sup>, 2022 (After School Program (ASP), 2 hours x 12 staff)</p> <p>The remainder of trainings will be offered in-kind by IRCOM staff.</p>	<p><i>Ongoing</i></p>
<p>Data Procedures Manual Revised.</p>	<p>December 2021 – January 2023</p>	<p><input checked="" type="checkbox"/></p>

### Task 5: Integrating Data Streams

Key Deliverables/ Outputs	Date Completed	Status
New data management framework developed, that identifies what data is collected, how, why, how it is analyzed and reported, etc. for the whole organization.	Guiding Principles created May 22 <sup>nd</sup> , 2022 (Workshop, 2 hours x 13 staff)  Data Management Framework for two largest teams at IRCOM (ASP and CRP) drafted as of October, 2022  Remainder of work to be offered in-kind by IRCOM staff.	<i>Ongoing</i>
Interim Report (mid-project).	April 15 <sup>th</sup> , 2022	<input checked="" type="checkbox"/>

### Task 6: Researching Data Management Systems

Key Deliverables/ Outputs	Date Completed	Status
Funds secured and data management/CRM (customer relationship management) system confirmed and purchased.	March-April, 2022	<input checked="" type="checkbox"/>

Additional Activities	Date Completed	Status
Extensive research by KMWG on various data management systems (including attending a number of live demonstrations from database providers and reviewing numerous an in-depth report funded by IRCC on database selection for settlement and sustainable housing providers.	October-February, 2022	<input checked="" type="checkbox"/>
Project Coordinator and IRCOM Executive Director participated in several discussions with partner organizations to share knowledge and discuss industry data management practices.	February, 2022	<input checked="" type="checkbox"/>
Project Coordinator completed a report comparing most commonly implemented data management systems in the industry, outlining their advantages and disadvantages.	February 9 <sup>th</sup> , 2022	<input checked="" type="checkbox"/>
The KMWG participated in a number of highly participatory discussions facilitated by the Project Coordinator surrounding the data management systems they believed best suited IRCOM's needs.	February 1st, 2022	<input checked="" type="checkbox"/>



The KMWG narrowed down their selection to two data management systems.		
Project Coordinator completed a detailed comparison analysis of the two data management systems, and the KMWG participated in a detailed voting system of the two data management systems.	February 7 <sup>th</sup> , 2022	<input checked="" type="checkbox"/>
Project Coordinator completed a final report recommending the two data management systems to Senior Management at IRCOM. This report included a detailed analysis comparing both systems on a number of categories relevant to IRCOM's data needs.	March 6 <sup>th</sup> , 2022	<input checked="" type="checkbox"/>
Project Coordinator met with Senior Management 3 times to discuss options, answer questions, provide more information, and aid in the decision process.	March 2022	<input checked="" type="checkbox"/>

#### Task 7: Data Procedures Manual

Key Deliverables/ Outputs	Date Completed	Status
Data Procedures Manual drafted.	Data Procedures for two largest teams at IRCOM (ASP and CRP) drafted as of October, 2022  Remainder of work to be offered in-kind by IRCOM staff.	<i>Ongoing</i>
Informal update by email sent to funder.	December 1 <sup>st</sup> , 2021	<input checked="" type="checkbox"/>

#### Task 8: Implement Data Management System

Key Deliverables/ Outputs	Date Completed	Status
New data management system launched	Data management system launched for two largest teams at IRCOM (ASP and CRP) as of 2022.  Remainder of work to be offered in-kind by IRCOM staff.	<input checked="" type="checkbox"/>
Final report submitted	October 12 <sup>th</sup> , 2022	<input checked="" type="checkbox"/>

## Findings and Lessons Learned

In this section, the key findings from this project are described. In no particular order, the key findings thus far have been: the need for greater coherence and shared learnings about technology in the social housing / settlement sector; the importance of assessing organizational capacity in while selecting a database provider, the importance of selecting a database provider who utilizes practices of knowledge mobilization, and the importance of prioritizing staff knowledge in the process of knowledge mobilization.

### The Need for Greater Coherence and Shared Learnings in the Sector

According to IRCC (2022), the Covid-19 pandemic emphasized the need for them to “utilize digital processes wherever possible,” and stated that they expect IRCC-funded agencies to do the same (p. 8). According to IRCC (2022), “many IRCC-funded Service Provider Organizations (SPO) are shifting away from a program-centric to a client-centric delivery model as part of greater strategic digital transformation initiatives (p. 9). This shift has led to an emphasis on implementing a case management approach with clients, described as:

“a comprehensive approach to supporting the settlement of GARs and other high needs and vulnerable newcomers ((for example: victims of gender-based violence, disadvantaged youth, LGBTQ2, etc.) facing multiple and complex barriers to integrate, typically provided during a client’s first 12-18 months in Canada. The approach generally involves the following activities: a comprehensive needs and assets assessment and settlement plan with followed referrals, regular monitoring of progress and check-ins at set intervals, as well as the provision of personalized and intensive supports, based on client needs,” (IRCC, 2022). Case management frequently requires a high degree of collaboration and communication between various settlement providers.

The simultaneous emphasis on digital transformation and case management approaches in the Canadian settlement sector calls attention to the need for cohesion in the settlement sector data management approaches. While IRCC-funded agencies have been encouraged to utilize customer relationship management (CRM) software to facilitate this (AMSAA, 2022, p. 7), the wide array of options available to settlement service providers with often limited technological capacity is often overwhelming.

From the beginning of the search for IRCOM’s data management, or CRM software, the Knowledge Mobilization Working Group prioritized speaking with partner organizations, as due to the collaborative nature of our work, it would be ideal if as many organizations as possible were using the same database. In total, the author of this report spoke to 7 large partner organizations, and found there was a high degree of uncertainty among them regarding which data management system to select, or in some cases whether a CRM should be built using applications such as Microsoft Power Dynamics.

It became clear that the search for a data management system is a very prevalent and timely challenge right now for many settlement service providers. While many of our partner organizations are still in the search and selection phase for a CRM, IRCOM did ultimately decide to proceed with the selection of a database, called CARMIS by NSD Tech, the selection process of which will be further described in the section below.

Near the end of the KMWG’s selection process, another organization shared with the author of this report an IRCC-funded report published by the Affiliation of Multicultural Societies and Service Agencies of British Columbia (Gocher, 2022) which consisted of an in-depth assessment of a number of commonly used CRM’s, and a set of recommendations. This highly valuable report, in addition to many other learnings among

organizations, would be very valuable to share sector-wide, and emphasizes the need for increased inter-sector sharing.

### Assessing Organizational Capacity and Needs is Integral to Selecting a Data-Base Provider

The Knowledge Mobilization Working Group (KMWG) at IRCOM participated in a lengthy and highly participatory selection of a data base provider. While at times, the process seemed long, the careful selection of a data base provider has been absolutely key to the success of this project. Beginning in 2021, the Knowledge Mobilization Working Group was formed and mandated with reviewing historic and current IRCOM database and research efforts, determining IRCOM's current and future data gathering needs, reviewing and evaluating database vendors, and recommending solutions for database implementation. Early on, the KMWG created a list of qualifications important for the future database to have. These included:

- User-friendly and intuitive;
- Servers based in Canada;
- Able to integrate with iCare;
- Able to integrate with the website;
- Is low cost with multiple users;
- Is able to link funders to programming and clients; and
- Software supports included in costs.

In addition, the selected database would also need to facilitate IRCOM's unique needs, facilitating the storage and analysis of settlement-, housing-, and program-related data, and allowing for case management. Based on this, in addition to the criteria listed above, a number of software options were eliminated in the early exploration phases (for a full list of eliminated databases and the justification, see Annex A).

In the search for a CRM, it was vital that methods of knowledge mobilization were used throughout. The KMWG was invited to participate in all visual demonstrations from CRM providers, and these demonstrations were then often synthesized, using screenshots and point form, to send back to the KMWG to a) be easier accessible to staff with highly limited time; and b) facilitate the inclusion of staff who could not attend these demonstrations. During this process, it was vital that the Knowledge Mobilization (KM) Coordinator listened to and considered the needs expressed by each member of the KMWG. To facilitate this, a number of group discussions, 1-1 emails and chats, and voting opportunities were given for staff to ask questions, and express their opinions on various CRMs.

Eventually, the KMWG narrowed down their selection to 2 CRM options: CARMIS, by NSD Tech, and Apricot, by Social Solutions. From KMWG input, and additional research by the KM Coordinator, an in-depth feature comparison of these two databases was created (see Annex B).

On March 29<sup>th</sup>, 2022, the KMWG submitted a report recommending both CARMIS and Apricot to IRCOM's Senior Management Team. The KMWG decided to recommend both CRM's to IRCOM's Senior Management Team, rather than selecting one, as there were differing and changing opinions about which

solution to select. While Apricot was a more visually attractive product, CARMIS was local, and provided a high degree of support throughout the process.

Shortly after receiving this report, the Senior Management Team met with the KM Coordinator, who synthesized the report into a visual and screenshot-based comparison report. Perhaps the most important discussion point in deciding between the two CRM's was the amount of support that IRCOM required. IRCOM requires a high degree of support in implementing a technological shift for multiple reasons: 1) IRCOM staff vary highly in both English and digital literacy levels; 2) IRCOM's unique model necessitates connecting overlapping and complex data across numerous programs; 3) IRCOM staff are very busy, and have limited time to spend in the creation of a data base; and 4) IRCOM had a high number of tenant files both in paper and Excel format, and had little capacity to move these files to a new database.

The high degree of support required by IRCOM in this technological transition led the Senior Management Team to select CARMIS, a local, small CRM who were able to provide a substantially higher amount of hands-on support throughout the process at the same cost. It is apparent that this choice has been vital in the to-date success of data base implementation at IRCOM, as will be further described in the section below.

### Selecting a Data Base Provider Who Follows Practices of Knowledge Mobilization

As stated above, IRCOM selected CARMIS, a local CRM provider who promised a high degree of hands-on support throughout the process. Importantly, in their trainings, while not explicitly stated, CARMIS has utilized practices of Knowledge Mobilization. In these trainings, staff are provided with a simple agenda, which contains links to their easy-to-use, graphic Online Knowledge Base. This Online Knowledge Base uses simple language when text is required, but prioritizes follow-along screenshots and videos.

Prior to the trainings, the KM Coordinator and IRCOM's IT Expert worked with CARMIS to ensure that the data relevant to each team, including activity and event names, was uploaded to ensure that the trainings were relatable and practical to each team. This was vital to ensuring that the trainings were useful, practical, and applicable to each team. In the trainings themselves, CARMIS used visuals and follow-along instructions to ease the teams' learnings.

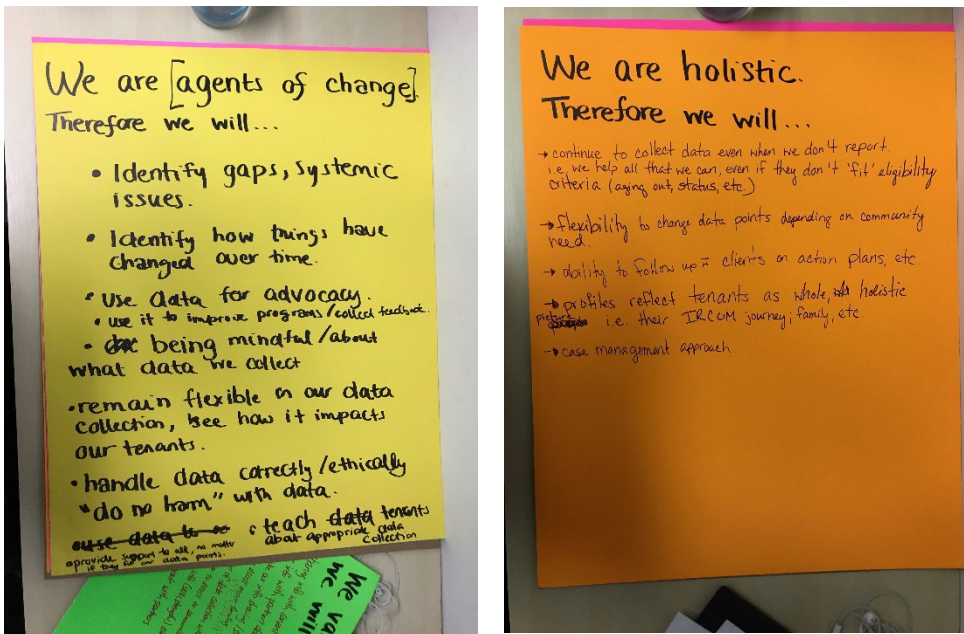
CARMIS also highly embodied knowledge mobilization practices of "co-producing new knowledge" by remaining highly receptive to teams' feedback, and incorporating this feedback into the creation of the database itself. CARMIS operated on the assumption that they would customize each team's section of the database, and based on questions in the demonstrations and questions that arise during use, they would likely need to alter and re-customize each team's section. This has proved absolutely vital in the process, and has allowed staff to continually and flexibly provide feedback and ensure that the CRM will work for themselves and their teams.

### Staff Hold the Knowledge Required and a Facilitator's Role Should be only to Provide a Space for this Knowledge

Perhaps one of the most meaningful exercises in the Knowledge Mobilization processes was the creation of Guiding Principles for IRCOM's Data Management Strategy. The creation of Guiding Principles was one of the recommendations in prior research in this project (Zell et. Al, 2020). While there are many already-made Guiding Principles for data management, operating under the principle of knowledge mobilization

that produced knowledge be beneficial for both the researchers and community service providers, it was vital that the team’s knowledge was prioritized, respected, and utilized.

On March 5<sup>th</sup>, 2022, the KM Coordinator facilitated a Guiding Principles workshop, in which staff were invited to share and discuss with one another what mattered to them in their work. Staff were encouraged to think of both IRCOM’s and their own values in this work, and incorporate these into Guiding Principles. In this workshop, the KMWG sat in a circle, and 7 staff were handed a poster board with one of IRCOM’s 7 values – We Put People First; We Are Agents of Change; We are Holistic; We Value Integration; We Value Independence; and We Value Diversity – written on the top. Staff with the poster boards were encouraged to lead a group discussion about how this value may impact how IRCOM’s data is managed.



As a result of this process, the KMWG created a draft list of Guiding Principles. This list (seen below in Annex C), was then shared with staff for further input.

## Results and Impacts

As stated in the introduction of this report, the initial primary objectives for this project, as stated in the *Contribution Agreement* were:

1. To hire and confirm all key project members and staff and their roles within the project;
2. To review and synthesize past research results and workshop the development of the seminal document that will guide the project, the Knowledge Mobilization Workplan;
3. To begin the process of knowledge mobilization by building buy-in and understanding for research and its benefits to a housing organization, and on the basics of data collection/management;
4. To train those team members who are most likely to be actively inputting, managing and analyzing data, in a revised data management system/ framework, developed through the project;

5. To develop a new data management framework for the organization, based on research, best practices, and the needs of the organization;
6. Well-researched selection of data management software/ system for use by the organization;
7. Following from prior research recommendations, produce a Data Procedures Manual for the staff team; and
8. To implement a new data management system with a trained and ready staff team.

While primarily discussed in the Schedule of Key Deliverables and Outputs section of this report, this section will provide an honest analysis of whether the intended objectives were achieved. It is the opinion of the author that objectives 1, 2, 3, 6, and 8 have been fully completed. The remaining objectives will be discussed below. In addition, an update of the CARMIS database process to date will be given.

#### Objective 4: To train those team members who are most likely to be actively inputting, managing and analyzing data, in a revised data management system/ framework, developed through the project

As stated in the Schedule of Key Deliverables and Outputs Section, three teams have successfully been trained in data management, entry, and analysis: The Employability Program, the After School Program (ASP), and the Community Resource Program (CRP). The ASP and CRP teams were identified as being priority teams, as they run the majority of programs at IRCOM, and encompass the most staff. The Employability Program was selected, as it is a new program, and it was decided it would be a good pilot for the new data management system, as the team consisted of only one person.

In the next month, the remainder of staff (less than ten) will be trained on using the data management system, in addition to the accompanying policies and practices. Based on the trainings to date, it is clear that this will be an ongoing practice as teams become more comfortable with the database, as well as encounter unforeseen challenges. For this reason, the KM Coordinator, who has been hired on at IRCOM for an additional 1.5 years as a Research and Evaluation Coordinator, in addition to the IT Expert and CARMIS, will continue to be involved in this process.

#### Objective 5: To develop a new data management framework for the organization, based on research, best practices, and the needs of the organization

While a new data management framework is in the process of being drafted, portions of this are on hold, as it would be more useful to complete once all teams are done training and have discussed in a participatory way how their data will be managed. Once this is complete, the KM Coordinator will continue this project in their new role.

#### Objective 8: Following from prior research recommendations, produce a Data Procedures Manual for the staff team

Thus far, Data Procedures Manuals have been drafted for the Employability Program, the After School Program, and the Community Resources Program. As the various programs begin using the database, these Data Procedures Manuals will be continually updated until somewhat of a comfort is reached, upon which the Manuals will be published using screenshots and clear instructions. As the remainder of IRCOM's teams are trained, their Data Procedures Manuals will continue to be developed by the teams themselves, and the KM Coordinator in their new role.

## Status of the CARMIS Database

To date, all present tenants at IRCOM have been uploaded into the CARMIS database. It is now possible to search any tenant at either IRCOM location using their first or last name, FOSS ID, address, or a number of other criteria. Tenants are now being enrolled into various programs, in addition to enrolled into various activities and events so their attendance can be marked.

Photo: The screen from which IRCOM tenants can be searched.

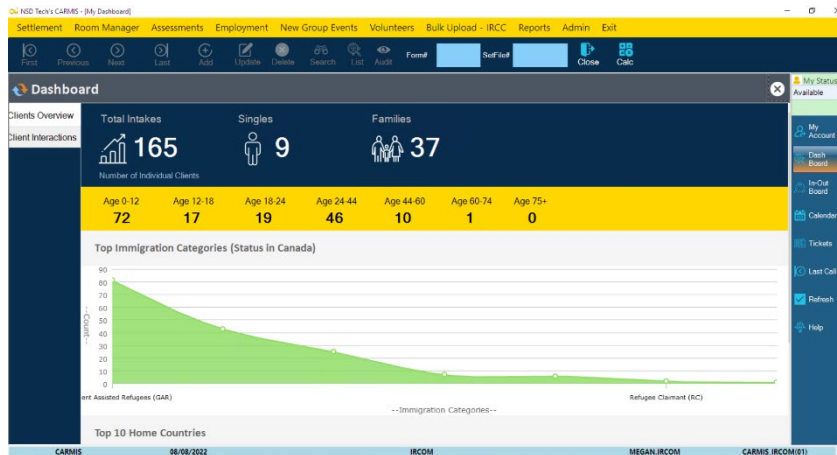


Photo: A sample dashboard based on IRCOM's tenant data.

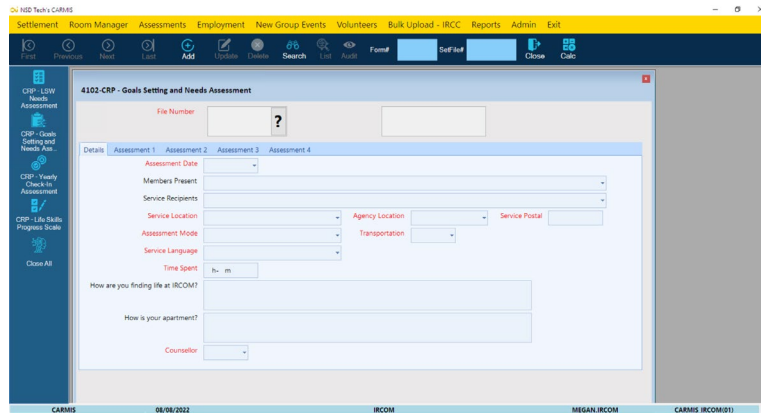


Photo: A digital format of one of IRCOM's previously paper-formatted forms.

## Recommendations for Next Steps and Additional Work

As stated in previous sections, the next steps for this project are to continue to train, and provide ongoing training, to IRCOM teams in the CARMIS database. In addition, the remainder of the Data Management Framework and Data Manuals must be completed. It is vital that the KM Coordinator, the IT Expert, and CARMIS stays highly involved to ensure that the remainder of the work is carried out in an accurate and reliable manner.

Finally, a recommendation for further work in this area would be an increase in inter-sector learning sharing and collaboration.



## Works Cited

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## Annex A

### Eliminated CRMs

CRM	Purpose of elimination
Accountability and Resource Management System (ARMS)	<ul style="list-style-type: none"> <li>▪ Not created with settlement/ resettlement services in mind (requires high degree of customization)</li> <li>▪ Dashboards are not customizable</li> <li>▪ No integration with Microsoft Office</li> <li>▪ No Language and Learning Services, Volunteer Management options</li> </ul>
Better Outcomes	<ul style="list-style-type: none"> <li>▪ Very user un-friendly (re: conversation with Monika Feist at Success Skills), SEED also transitioning away from Better Outcomes. Namrata at Manitoba Start informed us that there had been some “hiccups” with implementation and was frustrated because they didn’t meet the agreed-upon deadline.</li> <li>▪ According to Small Centers/ MANSO, requires a lot of double-entry, and several agencies noted issues with bulk upload.</li> </ul>
iSTEDY LMS + LARC	<ul style="list-style-type: none"> <li>▪ Requires high degree of customization, time, and effort (re: conversation with Heather at Family Dynamics).</li> <li>▪ Language Staff at Small Centers stated it was “cumbersome” and have had issues with it.</li> </ul>
Microsoft Dynamics 365	<ul style="list-style-type: none"> <li>▪ Requires high degree of customization</li> <li>▪ Majority of training and support would need to be in-house or through a hired outside contractor</li> </ul>
Neon CCM	<ul style="list-style-type: none"> <li>▪ Requires a high amount of customization in comparison to CARMIS and Apricot</li> <li>▪ No Microsoft 365 integration is offered</li> </ul>
OCMS	<ul style="list-style-type: none"> <li>▪ Fields and forms are not customizable, no Microsoft 365 integration</li> </ul>
SchoolSense	<ul style="list-style-type: none"> <li>▪ Fields and forms are not customizable</li> <li>▪ Not conducive to Case Management or Settlement/ Resettlement Services)</li> <li>▪ No expense tracking, notifications or alerts, or process automation</li> <li>▪ No Microsoft 365 integration</li> </ul>
CaseWORKS	<ul style="list-style-type: none"> <li>▪ Told it was not user-friendly based on conversation with colleague, very complicated, large learning curve.</li> </ul>
Newcomer Engagement and Platform (NEEP)	<ul style="list-style-type: none"> <li>▪ Rated poorly</li> <li>▪ Does not appear to be user-friendly</li> <li>▪ Appears to be in the early stages of development.</li> </ul>

NewOrg	<ul style="list-style-type: none"> <li>▪ Not user-friendly, appears dated.</li> <li>▪ According to notes from LIFT Data Management Webinar (shared by Tim), NewOrg has lots of options and is a huge task to customize. In addition: “it takes a lot of time. Don’t underestimate time and effort to customize and implement until it meets your needs and reports you require. May need additional people resources”.</li> </ul>
Salesforce Nonprofit Cloud	<ul style="list-style-type: none"> <li>▪ According to notes from LIFT Data Management Webinar (shared by Tim), Salesforce is more “daunting” – while it can save time in some areas it will “demand it in new ones. Data literacy / fear of IT will become very visible in staff when your whole org lives through a platform like NewOrg or Salesforce. Assume continuous training of staff. This is not a one-time training.”</li> </ul>
ShareVision	<ul style="list-style-type: none"> <li>▪ Small Centers/ MANSO rated it quite poorly in their evaluation - apparently, they are not very aware/ congruent with IRCC and iCare. Their evaluation also notes it require a high amount of customization to suit settlement programs’ needs.</li> </ul>
Coyote	<ul style="list-style-type: none"> <li>▪ According to Small Centers/ MANSO, more suited to mental health and social work case management, not very compatible so far with settlement services.</li> </ul>
NewTrack	<ul style="list-style-type: none"> <li>▪ Microsoft 365 PowerApp created for Immigrant Services Society of BC (ISS of BC). ISS of BC leases out this app to organizations, but has an agreement with IBC and ISM Canada who handle all implementation and support. This may mean communicating with two different organizations regarding issues.</li> <li>▪ Costs are unclear</li> <li>▪ IRCOM staff who have seen demos did not feel it was user-friendly</li> </ul>
Sumac	<ul style="list-style-type: none"> <li>▪ Only Desktop version available (no web or mobile)</li> <li>▪ Many additional/ hidden costs</li> </ul>

## Annex B

### Feature Comparison of CARMIS and Apricot 360

	CARMIS	APRICOT 360
SERVER LOCATION	Canada Hosted on Microsoft Azure Canadian Cloud	Canada Hosted on Amazon Web Services
MINIMUM CONTRACT	1 Year  No price increase for 3 years. Following that, while it is not currently in the plan, they may eventually implement an industry standard 5% increase (dependent on whether Microsoft increases their costs).	3 Years  3, 5, and 7-year contracts available, with 5-year being most popular.  “Prices <i>could</i> increase year-over-year, though not dramatically....[to allow] the product to improve in terms of features and functionality”.  See “Terms and Conditions” (attached).
SOFTWARE LOCATION	Desktop ✓ Web, or “thin-client” ✓ Mobile ✓ Mobile App ✓*  *Just released	Desktop X Web ✓ Mobile ✓ Mobile App X
ARE LICENCES TRANSFERABLE? (BETWEEN STAFF AND OTHER LICENCES)	Yes  Licenses can be shared between staff and can be given to our partner organizations.	Yes  They highly recommend it (for data security/ integrity) but do not enforce it.
AESTHETICS	CARMIS recently experienced a “face-lift”/ renovation. While not as “polished” as Apricot, it is definitely more appealing than	A more “polished” appearance than CARMIS.

	<p>before (and relatively comparable to other CRMs).</p>	
DATA MIGRATION	<p>There is the possibility of OCR (optical character processing) of paper files – this would be an extra charge.</p> <p>The data we do have in spreadsheets could be migrated free of charge.</p>	<p>No migration of paper files is offered.</p> <p>Included in implementation is the migration of one spreadsheet into an Apricot Form, and teaching us to do the rest ourselves.</p> <p>A video showing how to do this can be viewed <a href="#">here</a>. (looks quite easy)</p>
ICARE INTEGRATION	<p>Specifically created to support IRCC Bulk Upload.</p> <p>Once data is entered into CARMIS, it flags errors before uploaded to Bulk Upload.</p> <p>CARMIS creates a downloadable form that can be uploaded to iCare. CARMIS flags potential errors prior to uploading to iCare.</p> <p>It also lets you know <i>what</i> the error is – for example (PR number too many numbers).</p> <p>See <a href="#">here</a>.</p> <p>Reduces Bulk-Upload error rate by 98%.</p> <p>Data from iCare can also be downloaded and uploaded into to CARMIS.</p>	<p>While not specifically familiar with iCare, stated they could perform customizations allowing for data to be uploaded and downloaded between the two.</p>
TRAINING	<p>Online training provided at initial implementation.</p> <p>Includes “Train the Trainer”</p> <p>Webinars available for new staff.</p>	<p>Basic Training included: Live Apricot Setup Webinar; Live Apricot Results Reporting Webinar; Admin Video Library; End-User Training Library.</p>

	Access to online and continuously evolving database.	Additional training options can be purchased. See <a href="#">here</a> , for a full list of options and prices.
INITIAL SET UP, IMPLEMENTATION, AND CUSTOMIZATION	Includes initial implementation, setup, and configuration (including agency’s branding on reports), CARMIS smart forms and integrations.	<p>Guided through the process by a Solutions Consultant. A Project Manager will also be assigned to provide a project plan, timeline, and oversight. This project is to be completed over 12 weeks “anchored” by 1-hour weekly meetings.</p> <p>Includes a “kick-off” call and two discovery sessions, followed by the collaborative creation of a “Solutions Design” to meet IRCOM’s needs. May include consultation on recommended data management workflow. Features and functionality will then be configured, and may include a combination of up to 5 forms, up to 2 reports, up to 2 workflows, up to 2 staff roles with permission sets, and either Connect (client-facing tools) or Attendance Tracker as needed.</p> <p>Includes a take-home document visualizing Apricot staff user-journey for future use.</p>
ONGOING SUPPORT	<p>Unlimited support included. Currently 3 dedicated staff to help desk, but expanding. Can also call/contact Sumegha (founder) with questions.</p> <p>Quarterly meetings once established.</p> <p>Support help-desk ticketing, 9:00 – 5:00.</p> <p>Knowledge database <a href="#">here</a>.</p>	<p>“Tier 1” Support Included: up to 60 cases (15 per quarter, 5 per month) exclusively through email and online chat. Overages are totaled at the end of the month and billed \$50/ case.</p> <p>Chats answered in 60 seconds or less.</p> <p>See additional support options and costs <a href="#">here</a>.</p>

<p>DATA SECURITY</p>	<p>Varying access levels for different roles and departments.</p> <p>Daily data backups.</p> <p>Data is encrypted.</p> <p>Meets IRCC’s privacy and confidentiality requirements.</p> <p>User access audit logs and data change history logs.</p>	<p>Varying access levels for different roles and departments.</p> <p>Daily data backups.</p> <p>Data is encrypted.</p> <p>Meets HUD Domestic Violence, HMIS, Social Security Administration data management and security protocols, as well as FERPA and HIPPA standards.</p> <p>User access audit logs and data change history logs.</p> <p>For detailed security description see <a href="#">here</a>.</p>
<p>MICROSOFT 365 INTEGRATION</p>	<p>Integrates with Outlook Calendar and Teams.</p>	<p>Integrates with Outlook Calendar and Teams.</p>
<p>WEBSITE INTEGRATION</p>	<p>Able to integrate with the website (ex. Forms filled out on the website can be automatically entered into the database).</p> <p>See <a href="#">here</a>.</p>	<p>Able to integrate with the website (ex. Forms filled out on the website can be automatically entered into the database).</p> <p>See <a href="#">here</a>.</p>
<p>OTHER 3<sup>rd</sup> PARTY INTEGRATION</p>	<p>SurveyMonkey, MailChimp, Google Calendars</p>	<p>Google Calendar, Gmail</p>
<p>REPORTS</p>	<p>Hundreds of templates available that can be customized.</p> <p>Able to help customize/ create any additional reports we need.</p>	<p>Templates available that can be customized.</p> <p>5 Reports included with implementation, then can be</p>

	<p>Automatically creates reports for IRCC and other funders.</p> <p>Excel-style “tabular” report building for staff. “Tabular reports are based on a data-driven model where outputs are based on a multi-column, multi-row format. Once reports are generated, they can be modified using fields. See <a href="#">here</a>.</p> <p>For more advanced users, Microsoft Access style building for Admin (slightly more advanced). See <a href="#">here</a>.</p>	<p>filtered and edited by admin/ staff.</p> <p>“Drag-and-Drop” report building.</p> <p>“<a href="#">Native</a>” (within app) and “<a href="#">Apricot Results Report Writing</a>” (cleaner, pdf.)</p>
ATTENDENCE TRACKER	<p>Yes See <a href="#">here</a>.</p>	<p>Yes See <a href="#">here</a>.</p> <p>Can “enroll” tenants in various programs/ classes, see <a href="#">here</a>.</p>
VOLUNTEER MANAGEMENT	<p>Yes. Waiting for Sunday, March 20<sup>th</sup> to update with video.</p>	<p>Yes. Volunteers can fill out applications with a front-facing form, they can be scheduled and contacted, and their activities can be reported on.</p> <p>See <a href="#">here</a>.</p>
COLLABORATION	<p>Periodic agency consultations for CARMIS roadmap, enhancements, and business needs.</p>	-
ADDITIONAL FEATURES	<p>Waiting to update with video on Sunday, March 20<sup>th</sup>.</p>	<p>Integration with Census info (able to create “heat maps” of</p>



		where clients are moving, for example).
GOAL SETTING	Mentioned above, “Milestones” being released at the Metropolis conference. Can’t show screenshots until official release.	Yes, can set tenants personal goals, and goal categories. See <a href="#">here</a> .
NOTIFICATIONS	Yes, waiting to update with video Sunday, March 20 <sup>th</sup> .	<p>Dashboard Bulletin to inform staff of something upon login.</p> <p>Notification bell – can notify you when a form is completed, an application is made, etc. (all or individual user).</p> <p>Upcoming Due Dates (ex. Housing could see who has not paid rent, CRP could see which visits are due, see <a href="#">here</a>).</p> <p>Emails can be triggered based on answers selected (ex. If damages are entered, a trigger could be set to send directly to housing or maintenance).</p>
CLIENT-FACING FORMS	Yes. Waiting for updated video on Sunday.	Clients can apply for services, make updates to select information, and view their progress.
DASHBOARD (OVERARCHING STATISTICS, BIRD’S EYE VIEW)	Yes, user dashboard and client dashboard. See <a href="#">here</a> .	Yes
“VIEWS”	When managing as a family, family shares a file number and each tenant has unique ID number.	<p>Individual and Household Views.</p> <p>Change over time</p>
DUPLICATE CHECK	Yes	Names have to be entered exactly, but a duplicate check can be created based on other demographics (ex. Birthdate and

		PR). Aliases can also be entered (see here).
LANGUAGE	Tenants can read and fill out forms in their own language (ex. Tenancy application), and staff would receive it in English.  Compatible with Google Translate.	Tenants can read and fill out forms in their own language (ex. Tenancy application), and staff would receive it in English.  Compatible with Google Translate.
GRANT MANAGEMENT	Yes, see <a href="#">here</a> .	Yes, see <a href="#">here</a> .
Bigger Picture/ Senior Management Considerations		
DOES IT FIT WITH OUR PROCUREMENT “PHILOSOPHY”?	Local, Winnipeg-based.  Women- and immigrant-led.  Focused on refugees, immigrants, and newcomers.	Created for social sector.
CONSISTANT WITH OTHER SECTOR ORGANIZATIONS?	With both programs, data will have to be downloaded and uploaded between organizations (although this is possible).  Licenses or login would need to be given for direct entry into case files.  More consistent with iCare (created with iCare and IRCC in mind).  SEED is looking at building a Microsoft 365 solution – and CARMIS is integrated with Microsoft.  Success Skills is using CARMIS.  For full description of what our colleagues are doing, see <a href="#">here</a> .	With both programs, data will have to be downloaded and uploaded between organizations (although this is possible).  Licenses or login would need to be given for direct entry into case files.  For full description of what our colleagues are doing, see <a href="#">here</a> .

<p>WILL THEY WORK ACROSS ALL PROGRAMS?</p>	<p>Yes</p>	<p>Yes</p>
<p>CAN WE MEASURE THE 'SYNERGY' BETWEEN PROGRAMS? (EX. IF TENANT ATTENDS X, Y, Z, DOES IT AFFECT X, Y, Z?)</p>	<p>Both programs are able to create reports on this.</p>	<p>Both programs are able to create reports on this.</p>
<p>CAN WE INTEGRATE OTHER SOFTWARE WE CURRENTLY USE? EX. BETTER IMPACT, DONOR PERFECT, PAYWORKS?</p>	<p>Yes – it would involve downloading and uploading data between the two.</p>	<p>Yes – it would involve downloading and uploading data between the two.</p>
<p>IF THEY ARE NEW, WILL THEY BE AROUND FOR THE FORESEEABLE FUTURE? IF THEY ARE SMALL, WILL THEY BE ABLE TO WEATHER ECONOMIC UPS AND DOWNS?</p>	<p>NSD Tech received funding in 2018/2019 under the Government of Canada's Women's Entrepreneurship Fund (WEF) through Western Economic Diversification Canada (article here). While CARMIS was already created, they used these funds to add artificial intelligence to the program and add other improvements. This has helped them keep the cost of CARMIS very low. She said at this time, that they decided that they wanted all updates and upgrades to CARMIS to be included as they are created, as many of their clients are lower-budget and as non-profits wouldn't likely be able to budget a ton of unexpected increases.</p>	<p>Generally, not a concern for Apricot, large company, has been around for a long time.</p>

	<p>They work with Microsoft (also lower-cost than some other hosting services) and have an agreement with Microsoft that their costs won't increase for at least five years.</p> <p>Regarding unexpected/ additional costs, she said that so far, they're working with 19 clients (many similarly sized to us), and have not implemented additional costs on any of them.</p>	
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### Cost Comparison

Below we have compared the minimum costs associated with each database, based on 35 licenses (tax is not included in pricing). Costs are shown for both the first year and subsequent years, as Apricot has mandatory initial implementation and data migration costs in addition to the annual fee.

CARMIS informed us that if we had an enormous amount of data to migrate, there may be an additional cost, but not likely with what we had described.

**PLEASE NOTE: PRICES HAVE CHANGED SINCE MONDAY**

	CARMIS	APRICOT (3 YR/ 5 YR)
<b>INITIAL START-UP COSTS:</b>		
Implementation + data migration	Waiting on quote	\$10,027 + quote for data migration*
<b>Total Initial Start-Up Costs:</b>	<b>\$0</b>	<b>\$10,027</b>
<b>ONGOING COSTS:</b>		
Monthly Cost*	\$2,000	\$2,048/ \$2,027
Annual Cost*	\$24,000	\$24,570/ \$24,324
<b>Total Cost, First Year:</b>	<b>\$24,000</b>	<b>\$34,579/ \$34,351</b>
<b>Total Cost, Following Years:</b>	<b>\$24,000</b>	<b>\$24,570/ \$24,324</b>

\*Prior mandatory "Data Migration" add-on is no longer available/ was canceled by project team. The new "Implementation Costs" now include what is called the "Apricot Single Form Expansion Pack" – Which is the migration of one spreadsheet into an Apricot Form (which is then uploaded into Apricot). Included in this is teaching us to migrate data from Excel, Access, etc. into Apricot Forms to migrate the data ourselves. He said he believes this is possible and would be a major way to save money for us (but obviously many time, financial, capacity considerations)..

Please note that for the 5 year contract only, there is an offer to receive the first six months free.

### Additional Costs

It is important to note that Apricot has a number of optional additional costs we may need to consider, listed below. A few notes regarding extra costs if Apricot were to be selected:

- While many of these additional options will likely not be needed, at a minimum I would recommend the “Train the Trainer” option to increase in-house capacity (\$1,505). Ensuring there would be an in-house team of people highly skilled in Apricot could make it possible that additional support, and therefore additional costs, beyond what is included (Tier 1, described below) would not be needed. The KMWG discussed the possibility that all questions could be sent first to designated in-house staff or team of staff in order to:
  - Reserve the included 60 cases for questions that could not be answered in-house or through the resource banks (and avoid duplicate questions);
  - Determine questions or issues that were frequently coming up and answer them more widely (ex. Via webinars, trainings, manuals).
- To be considered: increased workload on existing IT staff (although as a part of the Research Project Coordinator contract I could likely help a lot with this while creating additional trainings etc.).

ADDITIONAL ADMIN TRAINING COSTS:		
Admin Boot Camp (4 afternoons of virtual training that reviews administrator features and functionality).		\$1,000
Admin Training Subscription (1, 3, and 5 years: quarterly access to boot camps and all basic and advanced administrator labs).		\$1,000/ \$1,250/ \$1,800 Annually
ADDITIONAL END-USER TRAINING COSTS:		
Quick Reference Guide (an infographic outlining steps included in one participant lifecycle in Apricot. This guide is intended to act as an at-a-glance reference for end-users.		\$450

<p>Custom end-user training (live, instructor-led training for up to 12 end-users. One program per session and up to 3 hours of training. Lessons and hand-on activities take place in customer's live site. Also available in Train the Trainer format.</p>		\$800
<p>Custom Train the Trainer Training: live, instructor-led meeting. One training session will review the client's configuration and review tips and tricks for training end users.</p>		\$1,505
<p>ADDITIONAL SUPPORT COSTS:</p>		
<p>Per additional support case (chat or email), over the 60 included in Tier 1.</p>		\$50/ additional case above 60
<p>Phone Support. This includes 1 hour per month (12 hrs/ year) of scheduled phone consultation with a member of the Customer support team. Overages are billed at \$150/ hour.</p>		\$1,500 for 12 hours/ annually \$150/ additional hour
<p>Advanced Support Consulting. Dedicated experts provide reactive consultation, check-in calls, and one-on-one help. Work with your ASC to provide services that align to your objectives and needs. Services can include configuration services, reporting development, and utilization of best practices. Customization of packages is available as needed.</p>		Starts at \$3,000/ annually

Managed Services. This support program provides a single point of contact who is a subject matter expert and works as if they are a member of your organization's team. Your dedicated expert provides proactive maintenance and administration which means you never need to log onto the platform so that you have more time to further the organization's purpose.

Starts at \$20,000/ year

## Annex C

### Guiding Principles

Version 1

May 29<sup>th</sup>, 2022

<p><b>WE PUT PEOPLE FIRST</b> We are a loving, welcoming community – an extended family – where everyone has a voice and where every voice counts. We go the extra mile to walk beside newcomer community members on their settlement journey. At IRCOM, we honour each story and embrace people’s traditions and cultures.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use the data to understand and tell rich stories</li> <li><input type="checkbox"/> “Do no harm” with our data collection – use trauma-informed data collection practices to ensure that participants are not further harmed or traumatized</li> <li><input type="checkbox"/> Collect data and reporting in a respectful, mindful way – be conscious of the implications of how data is shared</li> <li><input type="checkbox"/> Be aware of our biases and collect data in an objective, respectful way</li> </ul>
<p><b>WE ARE AGENTS OF CHANGE</b> At IRCOM, we listen to community needs and work to make positive changes. Sometimes this means innovation and thinking “outside the box” to find a solution. Sometimes, it means having the courage to speak even when your voice shakes. And always, this means supporting and being an ally for all newcomers, regardless of status.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Identify organizational and systematic gaps and issues</li> <li><input type="checkbox"/> Use the database to understand how things have changed over time</li> <li><input type="checkbox"/> Use the data we collect to advocate for our participants</li> <li><input type="checkbox"/> Use the data we collect to improve programs and collect feedback</li> <li><input type="checkbox"/> Remain flexible in our data collection (see how it impacts our tenants)</li> </ul>
<p><b>WE ARE HOLISTIC</b> IRCOM’s all-inclusive, wrap-around model aims to meet the needs of newcomers at many levels including physical, social and emotional. Beginning with a safe place to call home, we provide whole family support and never give up on our children, youth or adults.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect data that will be helpful to improve programs or will benefit tenants if we do not report on it (do not only collect data for the benefit of funders and reports).</li> <li><input type="checkbox"/> This may mean we continue to provide service to participants who do not “fit” reporting criteria (ex. If iCare only allows activity entry for a certain age group, we will still help a participant even if their information won’t be tracked).</li> <li><input type="checkbox"/> We will maintain flexibility in data points depending on community need (change the age range, if we want to expand our service delivery for example).</li> <li><input type="checkbox"/> Use the database to follow up on clients’ progress and action plans.</li> </ul>



	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use the database to reflect tenants as a “whole”, show a holistic picture (i.e. their IRCOM journey; family, etc.)</li> <li><input type="checkbox"/> Use the database to facilitate a case management approach that captures all aspects of a tenants’ journey at IRCOM</li> </ul>
<p><b>WE VALUE INTEGRATION</b>  At IRCOM, we believe integration is a two-way street – this means that we assist newcomers to adapt to Canadian society and help Canadians adapt to our evolving society. We work to build bridges and connections between all communities.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Educate tenants on appropriate data collection and use in Canada (data safety/ identity theft)</li> <li><input type="checkbox"/> Use the data we collect to educate Canadians about tenants at IRCOM</li> </ul>
<p><b>WE VALUE INDEPENDENCE</b>  IRCOM values the wisdom, experience and skills our newcomer community members contribute. We also know that it can take time to adjust to a new home. So, at IRCOM, we provide opportunities, including employment, to support our families move toward independence and success. In this spirit, IRCOM offers a “hand-up, not a hand-out.”</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use the database to provide support where it is needed, and not where it is not needed (inform us in “meeting clients where they are at)</li> <li><input type="checkbox"/> Integrating knowledge from Manitoba Start Needs Assessments into our data to determine clients’ needs</li> <li><input type="checkbox"/> Identify gaps in participants’ skill-set/ education/ support system etc. to facilitate their independence</li> <li><input type="checkbox"/> Work towards outward or client-facing data: tenants being able to independently access their own data.</li> <li><input type="checkbox"/> Ensure tenants can access their data when they request.</li> </ul>
<p><b>WE VALUE DIVERSITY</b>  At IRCOM, we have a passion for a society made of many peoples; this means we are open-minded, inclusive and respectful of others. IRCOM is committed to having a diverse team of staff and volunteers that includes those with lived immigrant and refugee experiences. We seek to be representative of the newcomer community we serve, at every level of the organization. Our community members are not just participants, but active decision makers.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Collect more organizational and program evaluations from tenant leaders and tenants</li> <li><input type="checkbox"/> Identify gaps in participation and programming for various demographics</li> <li><input type="checkbox"/> Understand program demographics (ex. Which participants attend at what time of year).</li> <li><input type="checkbox"/> Use language used is inclusive.</li> <li><input type="checkbox"/> Ensure a diverse audience can access IRCOM’s forms and other languages (ex. Ensure forms can be translated via Google translate)</li> </ul>
<p><b>WE VALUE PARTNERSHIPS</b>  At IRCOM, we know we cannot work alone. We must reach out and build strong partnerships with those who share our values so that the newcomer community has good services and supports that work together for their benefit.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure information is shared with the informed consent of participants</li> <li><input type="checkbox"/> Only share information to the extent it is in participants’ best interests, and to the extent it will help them</li> <li><input type="checkbox"/> Ensure data sharing is done in a safe, secure way</li> </ul>

	<ul style="list-style-type: none"><li><input type="checkbox"/> Share best practices of data collection and use with partners and funders</li><li><input type="checkbox"/> Use the database to communicate and work together more effectively with our partners</li></ul>
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