



**THE IMMIGRANT
EDUCATION SOCIETY**

The Immigrant Access Counselling Project

**Public Summary
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The Immigrant Access Counselling Project: 'Settlement Chat'

Public Summary

Summary of Project Activities

The focus of this document is the period of implementation of the Immigrant Access Counselling project at The Immigrant Education Society (TIES) lasting between 1 March, 2019 to 31 August, 2020. From 1 March, 2019 to 31 December, 2019, the Immigrant Access Counselling project went through a setup period on the program delivery side, and an ethics application and approval period from the research side, where a research design was submitted for review. The setup period on the program delivery side resulted in a decision to use a chat service on the Zoho platform as the primary mode of delivery, and the service began its implementation period on 1 August, 2019. The research dimension of the project received ethics approval from a University of Calgary Research Ethics Board, built a comprehensive survey instrument on the platform Qualtrics, and was deployed concurrently with the service. A semi-structured interview framework was also deployed concurrently to the survey. Data gathering ceased on August 31, 2020, while service delivery on the Zoho platform has continued peripherally to the operations of other programs at TIES.

The period that constituted the final stage of the project was from 1 January, 2020 to 31 August, 2020. This period involved the following:

Conferences and study dissemination

In March, 2020, the IAC project team was scheduled to present preliminary results at the Metropolis conference in Winnipeg, and the Counselling Psychology Conference in New Orleans. These were cancelled because of the COVID-19 Pandemic. As an alternative, the project team consolidated their presentations into a video presentation to be posted on the TIES website upon completion of the project and after the submission of the final report.

Continued provision online chat services with extension to other services

Apart from the conference portion converted to a video presentation, other activities remained the same from the previous interim report submitted in January, 2020. This includes the piloting of the online IAC services via TIES' 'Settlement Chat' on the Zoho platform, and the continuing study involving the recruitment chat users to complete a survey on their experience, and an invitation to participate in a more in-depth study. Participation in the chat increased to a total of 797, all surveyed participants increased to a total of 199, research study participants increased to a total of 91. These activities concluded in August 2020, and the results are discussed in more detail in the sections below.

Project Outputs / Deliverables

The Immigrant Access Counselling project achieved final results on 5 outputs: 1) the continuing implementation of the program design based on a preliminary study conducted at the beginning of the project; 2) the provision of one-on-one online information and referral services; 3) the provision of one-on-one online counselling services; 4) the creation of online guides based on a compilation of data on needs; 5) the evaluation of the program to inform a final service that is optimized based on pilot and research results.

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Results achieved on these outputs are detailed below:

Implementation of program design based on environmental scan and initial data gathering

The program design is based on TIES' current technological capacity as well as a response to an initial examination of comparable services offered currently or recently by other agencies across Canada. An online 'chat' is available through an icon on every page of the TIES website and is a combined text and audio service via the Zoho platform. The option of expanding to other modes of delivery including telephone calls, video conferencing on zoom or face to face meetings by appointment, were made available to clients using the chat. In essence the chat was deemed a gateway to all of TIES' services and beyond, within its scope as a settlement counselling tool.

The program pilot was evaluated by the TIES Research and Program Development department through a research design approved by the Conjoint Faculties Research Ethics Board (CFREB) of the University of Calgary. This involved a mixed-methods approach, incorporating a survey questionnaire based on the Qualtrics platform, with an invitation to be interviewed for further information by TIES research staff. This research portion of the project guided by a University of Calgary based researcher from the Werklund School of Education, who provided expertise on approach and analysis.

This program design was implemented starting on August 1, 2019 and was concluded on August 31, 2020. A total of 797 clients accessed the chat throughout its operational period, as recorded by the analytics and counsellors attending the chat, with 199 providing simple feedback by survey, of which 91 participated in a full research study, which included an UofC ethics-approved survey and a qualitative interview, of whom 7 of the 91 participated. This provided the project with data on participant experience which ranged from partial to comprehensive.

One-on-one online information and referral

The settlement chat was incorporated into the TIES website using an add-on platform called Zoho Premium. The advantages of Zoho include its affordability, compatibility with the current platform being used the TIES website. The added advantage of the Zoho premium platform is an integrated automatic translation function, where users speaking in 60 languages are able to communicate with the counsellor via the chat in their primary language. The software has a language auto-detection, in case TIES staff cannot determine the written language. Zoho Enterprise also offers an audio call which is user-friendly, in case some of the clients' experience difficulties typing. Additionally, this platform provides us with the clients' location (country), chat transcripts, clients' contact history and a chat queue. This platform can also auto-generate data that might be needed for reporting and project evaluation purposes. This was used to generate some of the data presented below.

The final pilot design involves the presence of a 'Settlement Chat' icon on every page of the TIES website, and staff available to respond during office hours and into the early evening, with weekend client requests saved by the Zoho platform to be responded to once office hours in Calgary resume. Clients click the chat icon, and send a typewritten message on a chat thread. This is responded to on text-based chat by a project settlement counsellor. Zoho allows the possibility to transitioning to audio, although this has rarely been utilized. The counsellors also have access to the Zoom platform, to which they can arrange with their clients to migrate their conversations. Like the audio-only option, this is also rarely utilized.

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Initial contact is client driven, with topics and the nature of requests determined by them. The type of queries is often also influenced by the page on the website the client clicks the chat through, with questions on employment emanating from employment training pages, questions on language training coming from pages providing information on English classes etc.

One-on-one online counselling

The functionality for online settlement counselling is the same as the one-on-one information and referral service, with only the topic of conversation/interaction differing. As such it is available through the Settlement Chat on Zoho, with TIES' primary settlement counsellor actively engaged in assisting with the project as a point of referral. However, assistance with stress and worries is the least common form of assistance requested, with queries on employment, language classes and access to community services being more popular as mentioned above.

Of the 797 clients who used the Settlement Chat between August, 2019 and August, 2020, 30 individuals booked appointments for more comprehensive interactions outside the chat amongst whom 6 booked an additional chat appointment, 2 booked a video conference and 3 booked an office appointment. 5 clients sustained contact with the TIES settlement counsellor, approaching her via other channels outside of the chat several times. 7 were referred to TIES' employment and settlement assistance counsellor, who provided sustained employment and financial assistance and guidance. The vast majority of users used this platform primarily as a source of Q&A about information on the website, and ended their interaction with the counsellors once their queries were answered.

Individuals who did experience a more comprehensive interaction with Settlement Chat counsellors indicated that 1) telephone or 2) email were the primary alternative modes of contacting TIES after outside of the Settlement Chat. The three most common concerns of those who did engage in counselling were 1) Employment, 2) Health and wellness, 3) Financial guidance.

Compilation of feedback on clients needs turned into helpful guides online

The combination of analytics data from the Zoho platform, combined with information gleaned from the research portion will be consolidated to create and enhance a 'guides' section, where the most popular topics requested by clients will be available. These topics are elaborated by volunteer writers and submitted for publication in the guides section. A compilation of these articles, combined with others submitted outside the context of this project, can be found via this link: <https://www.immigrant-education.ca/guides/>

Ongoing evaluation and feedback according to the research evaluation plan and program revisions

Research Design& Procedures

The project's research component uses a concurrent nested approach (Creswell, & Palno Clark, 2017; Kroll & Neri, 2009) where quantitative and qualitative data is gathered in parallel with greater detail obtained by the latter approach. After obtaining ethics approval from the University of Calgary's Ethics Review Board, the research survey was incorporated into the Settlement Chat platform. An in-depth, anonymous research survey was offered to Chat participants after they received online settlement services through the platform. Participants would receive a link to the study invitation and a consent form. The survey is hosted on the University of Calgary's Qualtrics platform, and is accessible on mobile devices in addition to desktop computers. Participants who complete the survey were entered into a

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draw for a \$50 gift card. Survey participants were also invited to a semi-structured qualitative interview inquiring into the effectiveness of the service they received and their experience in using the Chat platform.

At the end of the study, qualitative data for the settlement counsellors was gathered through online, semi-structured, qualitative interviews. More specifically, the two settlement counsellors providing services through the chat were invited to share their experiences with the research team. Interviews focused on the online settlement services provided, their effectiveness, and the experience of using such a platform.

Analysis of data from Qualtrics survey and interviews

While the data collected from the interviews employed a thematic analysis (Braun & Clarke, 2006; Clarke & Braun, 2013), the data gleaned from the surveys was analysed using descriptive statistics (Treiman 2014). The following steps were taken: 1) decoding, 2) encoding, 3) theme search and organization, 4) theme review, 5) defining and naming themes, and, 6) write up. This method permitted a comparison and contrasting of key differences and similarities, and unexpected findings.

Project Outcomes

The project has yielded data through the Zoho platform' analytics on the TIES website, and through the Qualtrics based surveys and qualitative interviews conducted by the project's research coordinator. Zoho provides information on simple number of transactions, initial indications of status, gender and url location, while the survey and interviews provide more qualitative context and insight into motivations, needs and reactions of the clients to the service.

Below is a compilation of data that indicate final results on the key outcomes of the project, which centre on 1) the provision of information, referral and settlement counselling online 2) creating greater awareness of available services amongst clients, and 3) facilitating access to programs and services.

Provision of information and referral and settlement counselling online

During our 11-month program evaluation (September 2019 to August 2020), a total of 797 clients used the online settlement chat. Out of the 797, 95 individuals completed a simple survey of their experience, whereas 104 clients expressed interest in participating in a more in-depth, UofC ethics board approved online anonymous survey to evaluate the service. 13 participants were excluded from the final analysis as they completed less than 30% of the survey, leaving 91 complete responses to the research survey.

Of the 199 who provided general survey information, 57% were female, 36% were male, 4% indicated other, and 3% indicated they preferred not to report. We were only able to collect age information from 120 participants, and of these 50% were between the ages of 25-34, 20% were between 45-54, 14% were between 15-24, 13% were 35-44, 3% were 55 and above. On the statistical report template included in this final report, there was no field provided for the 79 surveyed who did not indicate their age – as such this number was added to the 1 individual in the 35-44 field. 45% of respondents did not indicate their immigration status, 35% indicated they were permanent residents (of which 3% of the total are refugees), 12% indicated they were naturalized citizens, 8% are temporary residents on a pathway to permanency and 1% indicated 'other'.

Difficulty of collecting demographic data from Chat based participants

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It should be noted, however, that participation in the project's feedback gathering instruments (reaction surveys, interviews) relied primarily on voluntary participation and self-identification by clients. The format of the chat, with the ease with which to engage and disengage in conversation, made it difficult to press for accurate reactions, status information etc. that may interrupt the flow of the conversation and chat. The chat platform offered only very fleeting connection with the client. It was very difficult reconnecting with them to pursue a more in depth the scope of demographic and feedback information required in the project after they have received the service. Which is in contrast to students attending class in a more traditional program where they are a captive audience.

Chat outcomes:

Interviews conducted with participants showed that in general they were satisfied with their experience with the Settlement Chat. Clients preferred the direct guidance and advice provided by live counsellors rather than an AI, coming to TIES in person, cold calling or sending emails. Other chat services were found to be less targeted, and their queries were often addressed with general links to other websites, rather than the specific information given through the counsellors. As mentioned above, the convenience and the saving of time in using the chat was indicated as a strong point. The Settlement Chat platform was ideally suited for targeted, basic settlement concerns where the client had a clear set of questions. Rapport built with counsellors during the chat could lead to the addressing of secondary concerns or set an action plan.

Advantages of the 'Settlement Chat'

Interview respondents elaborated on the experience of users and indicated that the advantages of the chat centred in 5 areas. They found that it was largely: 1) Convenient, 2) it facilitated communication, 3) provided a human, empathetic component, 4) was accessible and inclusive and 5) it provided relevant, specific information.

- 1) *Convenience:* All interview participants attested to the convenience of using the Settlement Chat. Participants indicated time saved in commuting to TIES, allowed them to access information without disruption to other commitment such as work, family or study, saving much time setting up the support they required. While some interview participants indicated limited digital literacy, none reported any degree of difficulty accessing the Settlement Chat from various devices.
- 2) *The Chat facilitated communication:* All interview participants indicated that responses to their concerns was prompt and allowed for a high degree of interaction with the settlement chat counsellor. It overcame the language barrier to a degree, because it allowed participants to prepare their questions in advance, look up information on their own time, more so than a face to face interaction would have allowed.
- 3) *Human, empathic component:* Participants indicated that the experience of speaking to a real person available on the Settlement Chat, as opposed to the usual website chat function powered by artificial intelligence (AI) offered a level of comfort and reassurance, and conveyed empathy and understanding.
- 4) *Accessibility and inclusion:* having access to counsellors on the chat outside of business hours was thought by participants to be an advantage of the Settlement Chat. They also indicated that the anonymity afforded by the chat, compared to their identifiability when coming for a face to face consultation, was another advantage. Participants felt less inhibited to ask the questions they wanted to be answered.
- 5) *Relevant, specific information:* Participants indicated that they appreciated the customized nature of the information provided for them based on the needs they expressed on the chat. Compared

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to the overwhelming nature of the generalized and large amount of seemingly confusing information provided on the TIES website, chatting with an online counsellor provided an opportunity to parse this information based on what their current requirements were.

Disadvantages of the 'Settlement Chat'

Despite the effort to implement an auto-translation function on the Zoho platform, its unwieldy nature, the only marginal improvement offered by the use of Google Translate, and the linguistic limitations of the two Chat counsellors resulted in the feeling amongst participants that the lack of language options was a key disadvantage. Another disadvantage indicated was the lack visual feedback/body language cues due to the nature of the platform.

Counsellors on the Chat indicated that there were limitations to the use of the platform that had an impact on service delivery. Unlike in person counselling, clients could exit the chat without warning, leaving the counsellor with incomplete information about the client as well as the sense that providing further assistance without the client returning would be impossible. Fear of identification (when counsellors would start to ask demographic information), either as a member of an ethnic or religious minority, seemed to be a primary motivator for clients to exit the chat.

Features to enhance the Chat experience, such as the option to video conference, translation functions, and to setup a face to face appointment, were largely underutilized by clients using the service. As mentioned above, it seems to be the case that those using the chat sought the convenience, anonymity and the ability to prepare and look up information and language during the interaction. To move to a more interactive format would have, it seems, removed those advantages for those preferring the chat

Awareness of resources& ability to access available programs and services

A majority of survey participants indicated that they found the Settlement Chat helpful in addressing their needs and learning how to access relevant resources either at TIES or externally. Clients used the platform most often for 1) vocational/career guidance, followed in importance by 2) information on services and resources, 3) language supports and least often for 4) mental health supports. Most clients using the Chat who were surveyed indicated that the services met their requirements, and the online platform was efficient and timely in comparison to other similar chat platforms. 78% (156) indicated that they found the service very helpful, 15% (30) found it somewhat helpful, and 7% (13) did not provide an answer. Seeking help with language could sometimes overlap with seeking vocational/career guidance, as often taking language courses facilitated the acquisition of employment. Most inquiries on the chat pertained to clarification of information provided on the TIES website. In addition to concerns about language and employment, other requests included cultural issues, mental health needs or a selection of concerns that were beyond the scope of TIES' services.

New Knowledge

Recommended improvements:

There are some suggestions on improving the online settlement counselling platform. One was to expand the hours of availability of live counsellors beyond business hours to improve access expand on the convenience of the service. A clearer divide between settlement counselling and mental health counselling was also recommended. The intermediary role between the client and more professionalized external services was often misunderstood by clients with such concerns, and with references to 'feeling stressed and overwhelmed' in TIES online marketing, the differences were not always clear.

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Offering services through an online chat platform extends the reach of the organization's settlement services to a wider scope of clientele, in particular those with issues of mobility and isolation. This includes, for example, parents with young children, individuals in remote locations and with issues regarding transportation. When considering how such a Chat service can improve, program designers must consider their clients' capacity to utilize the information and referrals provided to them by the service. The advice and guidance offered should be usable and accessible to the clients.

Only a small portion of the program participants indicated a need for mental health supports. This is not surprising since a considerable body of research has pointed to how newcomer individuals underutilize such services (Mikal & Woodfield, 2015). Of the participants who participated in the research portion of the project, one rated their experience with the chat as somewhat positive, and nine others rated it as very positive. Concurrently, counsellors interviewed for this study indicated that it was quite challenging to offer emotional wellness support online, and in fact it was the most difficult service to offer overall. There seem to be several reasons for this difficulty, including the counsellors' lack of familiarity with offering this type of support online through a chat, and the necessity to reference the full range of supports offered by the organization. The delivery of counselling online is a well-established practice elsewhere, including for example, Employee Assistance Programs that have been delivering this kind of service for years. The COVID-19 pandemic has also created an increased demand to access services remotely online. However, in the case of the IAC project, this dimension of the service was subsumed under the broader scope of settlement supports offered that clients were more comfortable reaching out for. As such, research participants interviewed in the study portion of the project indicated that any dimension of emotional counselling should be delivered as a standalone service and separately, without the added context and apparent complication of being included within the scope of settlement services in general. This would come with the added advantage of having more specialized personnel offering such supports.

Project Impact on Organization

The project was key in extending TIES's reach to newcomers with specific queries about programming as well as community resources. As mentioned above, the Chat, operated by live settlement counsellors, provided a mode of service delivery that provided convenience, empathy beyond the typical AI-driven website chat, anonymity and accessibility for the clients that used it. In the context of the COVID-19 pandemic, the online and accessible nature of the Chat was also important in maintaining a connection to newcomers who have not yet registered in a TIES program, or have not otherwise been engaged. The challenges faced by the project resulted in several key learning items, and they are the following:

Client Priorities: as they are providing a generalized service that connects to a myriad of programming available at the organization and within the broader community, counsellors need to be knowledgeable in a multitude of topics and resources needed by newcomers who are in the process of settling and integrating. These include employment and vocational training programming, language courses available and their accompanying eligibility requirements as well as how to access them. This information must also be constantly updated, given the ephemerality of these programs within the settlement sector.

Consideration of language and cultural barriers: Counsellors should ensure that they convey a sense of welcome and cultural safety in the communicative space provided by the Chat. They should understand and anticipate that their clients will be those facing linguistic barriers, with a pace of communication that is slower and more deliberative.

Appreciation of counsellors and clear boundaries to accessibility: The impersonality, distance and abruptness of the shifts in communication offered by a Chat platform can leave counsellors feeling underappreciated. There should be a solid system with a clear communication of session schedules, a

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greater emphasis on appointments, and on the fact that those operating the Chat are real individuals not just an AI.

Marketing of the platform: It is important to be clear in the marketing with regard to offering the Chat service as a combination of settlement and emotional wellness supports, or a service that offers one or the other. As the organization's remote and online counselling offerings proliferated through the course of 2019 and especially during the pandemic throughout 2020, the IAC project was subsumed in marketing of other, seemingly similar programming.

Challenges and Trends

The major challenge has been getting participants to accurately self-identify their legal status in Canada. It is naturally easier to establish the legal status of participants in the research survey. Many participants don't know the distinction and pressing to gain more accurate information often doesn't fit naturally in the conversation, not salient to the need being addressed or has been a deterrent to continued participation. The priority has remained the addressing of their immediate needs and concerns, with the collection of detailed demographic data coming second.

It is also difficult to glean the information required in the SILP statistical report template due to the nature of the online chat. Clients are prone to disconnect with the online counsellor when the conversation is no longer relevant and aimed at gathering the extensive demographic data required on the template. As such the data entered is only what we were able to gather at this point, it is relatively incomplete beyond total number of contacts.

The built-in translate feature – a key aspect in the decision to use the Zoho platform, did not meet the demands of the service. It was too slow and cumbersome, and as a result, rarely assisted with clients facing linguistic barriers. Counsellors grew frustrated with the slow connection and preferred to use the Google Translate webpage instead. If you offer contacts to type in their first language and say you will use Google Translate, 100% decline and prefer to attempt conversation in English, even if it takes much longer. Conversely, if you let someone begin talking in their first language, and you begin the conversation using Google Translate without telling them, they are happy to continue, even if you tell them that's what you're doing near the beginning of the conversation.

The resorting to the use of Google translate undoubtedly led to the comments by interview participants suggesting the availability of the service in more languages. While one counsellor spoke Arabic, other languages request were not accommodated as effectively as we had hoped with the Zoho translation function.