

REQUEST FOR PROPOSAL NATIONAL SETTLEMENT SECTOR COMMUNITY OF PRACTICE (CoP)

**Blueprinting, Architecture &
System/Application Design, Development,
Testing, and Implementation**

Deadline for Receipt of Submissions:

1. Organizational Profile

OCASI was formed in 1978 to act as a collective voice for immigrant serving agencies and to coordinate responses to shared needs and concerns. Its membership is comprised of more than 220 community-based organizations in the province of Ontario. OCASI asserts the right of all persons to participate fully and equitably in the social, cultural, political and economic life of Ontario.

2. Proposal Submission Instructions

2.1 General

- (a) Your Submission for this opportunity must be made in writing electronically to RFP@ocasi.org by the Closing Date Milestone (below) and with two printed copies to OCASI as follows:

Karen Scott
Senior Manager, IT & New Media
Ontario Council for Agencies Serving Immigrants (OCASI)
110 Eglinton Ave. W. Suite 200
Toronto, ON
M4R 1A3

Bidders shall be solely responsible for the delivery of their Submission by the Closing, in accordance with the Submission Instructions herein.

- (b) Your Submission is to be firm and irrevocable for one hundred and eighty (180) calendar days from the Closing.
- (c) RFP Timetable

<u>Milestone</u>	<u>Date</u>
Issuance of Proposal Documents	July 9, 2018
Deadline to Submit Questions	July 16, 2018 at 5:00 pm Toronto time
Last day for issuance of Addenda	July 18, 2018
Closing	July 23 rd , 2018 at 5:00 pm Toronto time
Estimated Start of Services	August 1, 2018

OCASI may, without liability, cost or penalty and in its sole discretion amend the RFP Timetable.

Notwithstanding the above, OCASI reserves the right to postpone the Closing at which time all potential Bidders shall be advised of the new Closing by way of Addenda.

2.2 Proposal Enquiries

- (a) All written enquiries and other communications prior to full Contract execution are to be directed solely to the responsible manager, Karen Scott, Senior Manager, IT & New Media (kscott@ocasi.org).
- (b) Information communicated to anyone else shall be considered informal and OCASI shall not be bound by any information given in such a manner.
- (c) Any questions concerning this Proposal Document are to be directed, in writing, to the responsible manager, Karen Scott, Senior Manager, IT & New Media (kscott@ocasi.org) prior to the deadline for submitting questions. No questions or requests for clarifications, changes or amendments of this Proposal Document shall be entertained after this time regardless of the reason. To allow for dialogue

on any questions or requests, OCASI encourages Bidders to submit their questions or requests early in the Question and Answer process. When seeking changes or amendments to any of the terms and conditions of this RFP Process, the Bidder should provide sufficient detail to provide OCASI understanding of the rationale for the change or amendment and, if applicable, the Bidder should propose the language that would address its concern(s).

- (d) All questions/requests for clarification, change or amendment related to this Proposal Document are to be submitted via e-mail to the responsible manager, Karen Scott, Senior Manager, IT & New Media (kscott@ocasi.org). Indicate the document section related to each question being submitted as well as page, section number and details of the specific question/request.
- (e) When necessary, revisions to, or clarifications of this Proposal Document will be incorporated into a written addendum issued by the responsible manager, Karen Scott, Senior Manager, IT & New Media (kscott@ocasi.org). Information regarding this Proposal Document or the Services, whether provided by the responsible manager, Karen Scott, Senior Manager, IT & New Media or from any other source, whether verbally or in writing, shall be considered informal and OCASI shall not be bound by, or liable for, any such information unless incorporated into a written addendum.

2.3 Addenda / Changes to the Proposal Documents

- (a) In the event that OCASI determines in its sole discretion, that clarifications of, or revisions to this Proposal Document are required, OCASI shall issue an Addenda in writing.

2.4 Proposal Submission

- (a) Bidders submitting a Submission to OCASI shall exercise extreme care.
- (b) Bidders shall examine carefully the whole of this Proposal Document. They shall make the necessary investigations to inform themselves thoroughly as to the character and magnitude of the scope, requirements, and deliverables
- (c) The Bidder shall not claim at any time after the Closing and/or after notification of award of the Contract that there was any misunderstanding or uncertainty in regard to this Proposal Document or any of the contents therein. No plea of ignorance of conditions which exist, or any conditions or difficulties that may be encountered, shall be accepted as a reason for failure to complete the Contract or as a basis for claims for additional compensation or extension of time.
- (d) Your Submission should be completed fully in a clear and comprehensible manner.
- (e) Submissions must be submitted as outlined in the “General” section above. Submissions sent in any other manner shall be non-compliant and disqualified.
- (f) The Submission must not include any qualifying statements, including any statements which limit the Services to be provided by the Bidder. Any Submission which contains such qualifying statements shall

be non-compliant and disqualified unless such qualifying statements are withdrawn in writing upon request by OCASI. OCASI, at its sole discretion, will determine what constitutes a qualifying statement.

- (g) If during the preparation of their Submission, the Bidder desires to make a change which requires correction, alteration or erasure to any information previously entered in a designated section of the Submission by the Bidder can be added, removed and/or re-submitted as often as required at any time, prior to Closing.
- (h) All prices shall be firm and quoted in Canadian funds. The prices quoted in the Submission shall represent full payment for all such Services as is necessary for the proper completion of the Contract.
- (i) After the Closing, Bidders that have submitted a Submission shall be notified in writing of the results of the award to the successful Bidder. Results of the award to the successful Bidder.

2.5 Submission to Be Retained by OCASI

- (a) OCASI shall not return a Submission or any accompanying documentation submitted by a Bidder.

2.6 Confidential Information of OCASI

- (a) All confidential information provided by or obtained from OCASI in any form in connection with the Submission process is the sole property of OCASI and shall be treated as confidential; shall not be used for any purpose other than replying to this Proposal Document and the performance of any subsequent agreement; and shall not be disclosed without prior written authorization from OCASI.

2.7 Bidders Shall Bear Their Own Costs

- (a) The Bidder shall bear all costs associated with or incurred in connection with its participation in this RFP Process, including, preparation of its Submission.

3. Proposal Submission Requirements

3.1 Mandatory Requirements

- (a) Bidders must meet all mandatory requirements in order for their Submission to be considered further. Failure of a Bidder to meet all of the mandatory requirements listed below will result in the Bidder's Submission being deemed non-compliant and therefore not be considered further. The mandatory requirements for this Proposal Document are as follows:
- Bidders shall provide an Executive Summary.
 - Bidders shall provide the Company Profile.
 - Bidders shall provide Corporate References with at least one reference project that entailed blueprinting, architecting, designing, developing and implementing a CoP.
 - Bidders shall provide the approaches, solutions, technology and information components to meet the requirements in Appendix A for the Beta/pilot (MVP) and nationwide launch.
 - Pricing information must be provided.
 - Bidders shall declare any Conflicts of Interest.

3.2 Submission Format

The Bidder's Submission must be submitted in the following format:

- Present information in Font Size 12 pt. on 8½ x 11 paper size.
- Include a table of contents.
- Organize information into sections which correspond to the Submission Content Requirements in the exact order described below.
- The entire content of the Bidder's Submission shall be submitted in writing, and the content of web sites or other external documents referred to in the Bidder's Submission will not be considered for evaluation unless submitted in their entirety as part of the Submission.

3.3 Submission Content

- The Bidder's Submission should include: a Technical Submission and shall include a Price Submission. The information required in each Submission as well as the prescribed format in which it should be submitted is outlined below.
- Technical Submission - The Bidder's Technical Submission should comprise the following sections in the following order.
 - Technical Submission Section 1: Executive Summary**
 - Technical Submission Section 2: Corporate Summary:**
 - Corporate Summary: Description of Company - A description of the Bidder's company, including: a description of the Bidder's corporate and ownership structure; a brief corporate history including number of years in business; location of offices (both head office and other) and a description of the Bidder's core business as it applies to the Services.

ii) Corporate Summary: Corporate Firm - Provide a description of the structure of the Bidder's Corporate Firm; Identify the Subcontractors it proposes to use in the performance of the Services. For each Subcontractor listed the Bidder should provide the following: Full corporate name and location of the Subcontractor; which area of the Services the Subcontractor will be employed for; the Subcontractor's experience and qualifications relative to the Services it will be performing; and previous instances of the Bidder and the Subcontractor working together, including: A description of the project and value; The client the services were performed for; and the parts of the services performed by the Subcontractor.

iii) Corporate Experience and Qualifications - The Bidder should demonstrate its experience in performing work similar in type, size, estimated value and complexity as the Services defined herein by including a summary of the Bidder's company's qualifications and experience relevant to the Services, including: the necessary resources to sustain and complete the Services to the satisfaction of OCASI; experience blueprinting, architecting, designing, developing and implementing a CoP.

c. Technical Submission Section 3: Corporate Projects and References:

i) Description of Corporate Projects and References - The Bidder should provide a list of three (3) references, for relevant projects completed within the past five (5) years or currently active, which demonstrate the Firm's experience, qualifications and its capacity to perform and manage projects of similar scope, complexity and estimated value. Any projects of similar type, size, estimated value and complexity as the Services that have been completed for OCASI must be included as part of the three (3) reference projects provided by the Bidder including: Name of the company for which the work was performed; Project title; Contact person's name, title, telephone number and e-mail address; and Start and completion date.

d. Technical Submission Section 4: Team Experience and Qualifications:

i) Team Experience and Qualifications – The Bidder should provide an Organizational Chart identifying the named Key Personnel assigned and dedicated to the project, in their role, for completion of the Services, as well as the roles and responsibilities of the other resources who will be assigned to the project. Roles and responsibilities of each resource should include a brief description identifying the role and responsibilities of each resource, with respect to the Services requested; a statement indicating whether the resource is an employee of the Bidder or is a Subcontractor; and a statement of availability of Key Personnel indicating that the individual is available for the required duration. For each of the individuals to be employed in the above roles (including Key Personnel), a resume should be provided, including reference projects.

e. Technical Submission Section 5: Project Approach and Plan:

i) Proposed approach for the Beta/launch (MVP).

ii) Proposed approach for the nationwide launch.

iii) A draft project plan based on the proposed approaches, with appropriate reference to the scope, activities and milestones based on the requirements in Appendix A.

iv) A description of the methodologies and tools that the Bidder proposes to leverage for this project, including tools and templates that will be provided to OCASI. Bidders are requested to include sample tools and templates and other deliverables as an appendix to their submission.

f. Price Submission:

- i) For the Beta/pilot (MVP).
- ii) For the nationwide launch.

g. Conflicts of Interest

4. Proposal Evaluation Criteria and Selection Process

4.1 Proposal Evaluation Methodology

Submissions shall undergo several phases of evaluation based on the information provided using the criteria and scoring as listed in the Proposal Evaluation Criteria Section below.

Each criteria is evaluated. Mandatory criteria will be rated pass or fail. All other Evaluation Criteria shall be assigned a score out of ten (10). The score is then multiplied by the weight (which indicates the relative importance of the criteria not deemed critical to OCASI) to determine the weighted score. The weighted scores are then added to determine the Total Overall Score for the Submission.

Submissions shall be evaluated in three (3) phases, as follows:

(a) Phase One: Administrative Evaluation (Compliant/Non-Compliant)

Submissions shall undergo an administrative evaluation to determine compliance with the mandatory requirements as outlined in Section 3. Only those Submissions determined in the sole opinion of OCASI, to have fulfilled all the mandatory requirements shall proceed to Phase Two of the evaluation process. Submissions that do not meet administrative requirements are non-compliant and shall be disqualified.

(b) Phase Two: Technical Evaluation (75% weighting)

Submissions proceeding to Phase Two shall be evaluated by the Evaluation Committee in accordance with the Proposal Submission Requirements above and Evaluation Methodology below. Only those Submissions achieving a total minimum score of 70% (525 points out of 750 possible points) shall be considered further and shall proceed to Phase Three of the evaluation process.

(c) Phase Three: Pricing Evaluation (25% weighting)

Bidder's costs shall be evaluated for the Submissions which achieve the minimum scores on the Phase Two evaluation. Bidder's costs shall not be evaluated for those Bidders whose Submissions do not achieve the specified minimum score requirement to proceed to this Phase Three evaluation. The pricing of each Submission proceeding to Pricing Evaluation shall be evaluated and scored as follows:

- a. The Submission with the lowest Total Evaluated Price shall receive the maximum score of ten (10) points for the Pricing Evaluation.
- b. The following equation shall be applied to all other Submissions to determine a score out of ten: $\text{Lowest Total Evaluated Price} / \text{Bidder's Total Evaluated Price} \times 10 = \text{score out of ten}$.
- c. The score out of ten shall be multiplied by the weighting factor of 25 to result in a Pricing Evaluation score (out of 250 points).
- d. The score out of 250 for Pricing Evaluation shall be added to the total score for Phase Two and Phase Three to determine the Total Overall Score for the Submission to determine the Total Overall Score for the Submission Total Overall Score.
- e. Total Overall Score = Phase Two: Technical Evaluation + Phase Three: Pricing Evaluation

OCASI's selection shall be based on which Bidder has provided a Submission which OCASI determines in its sole discretion to provide the greatest value to OCASI based on the Evaluation Criteria contained herein.

Total Overall Score: The award of the Contract shall be made to the Submission which has achieved the highest Total Overall Score.

4.2 Proposal Selection Criteria

The Evaluation Criteria to be used for evaluation of the Bidder's Submission and the weighting assigned to each criterion are as follows:

Evaluation Component	Maximum Score	Weighting Factor	Total (Score x Weight)
PHASE ONE: ADMINISTRATIVE EVALUATION (Compliant / Non-Compliant)			
PHASE TWO: TECHNICAL EVALUATION			
Technical Submission Section 1: Executive Summary (Compliant / Non-Compliant)			
Technical Submission Section 2: Corporate Summary			
Description of Company	10	1	10
Corporate Firm	10	1	10
Corporate Experience & Qualifications	20	2	20
Sub-total Corporate Summary			40
Technical Submission Section 3: Description of Corporate Projects and References			
Description of Corporate Reference Project 1 and Corresponding Reference	10	2	20
Description of Corporate Reference Project 2 and Corresponding References	10	2	20
Description of Corporate Reference Project 3 and Corresponding References	20	2	20
Sub-total Description of Corporate Projects & References			60
Technical Submission Section 4: Team Experience and Qualifications			
Functional Organization	10	5	50
Resource Experience and Qualifications	10	30	300
Sub-total Team Experience and Qualifications			350
Technical Submission Section 5: Project Approach and Plan			
Project Approach and Plan	10	15	150
Methodologies and Tools	10	15	150
Sub-total Project Approach and Plan			300
Sub-total PHASE TWO		75	750
PHASE THREE: PRICING EVALUATION			
Sub-total PHASE THREE		25	250
TOTAL OVERALL SCORE		100%	1,000

Technical Submission Scoring Guidance – The Bidder’s Technical Submission will be evaluated using the aforementioned approach. The following table outlines how each line item will be scored:

Score	Description
10 = Excellent	Response exceeds the requirements
9 = Very Good	Response substantially meets all and exceeds some of the requirements
8 = Good	Response meets all of the requirements
7 = Satisfactory	Response substantially meets most of the requirements
5-6 = Acceptable	Response meets most of the requirements
3-4 = Fair	Response meets some of the requirements
1-2 = Poor	Information provided is too vague and does not clearly explain how the requirements will be met
0 = Non-relevant	No relevant response or simple statement of compliance with no substantiation

5. Proposal Scope and Requirements

5.1 CoP Introduction

The bilingual National Settlement Sector Community of Practice (CoP) will be an online community where sector staff, leaders can engage to learn, share, connect and collaborate. Please refer to Appendix B – Settlement Sector Overview for an introduction to the sector.

5.1.1 Vision

The sector's vision is that the CoP will be a common space that:

- Connects settlement practitioners who may never come into contact otherwise.
- Provides a shared context for practitioners to communicate and share information.
- Enables dialogue between people who have an interest in solving the same or similar problems.
- Stimulates learning.
- Captures and diffuses existing knowledge.
- Introduces collaborative processes and encourages the free flow of ideas and information.
- Helps people organize around issues.
- Generates new knowledge.

5.1.2 Overall Goal

Create a community in which all stakeholders are equals in creating knowledge / practice that leads newcomers to successfully settle in their new home.

5.1.3 Project Objectives

The main objective of this project is to develop and maintain a bilingual National Settlement Sector Community of Practice (CoP) where sector staff and leaders can learn, share, connect and collaborate. The project's objectives are to:

- Build a Community of Practice where settlement practitioners, leaders and professionals can connect, share, collaborate and learn; thereby building their knowledge and skills capacity with a focus on improving settlement services;
- Facilitate the provision of consistent, innovative and coordinated services;
- Create a unique "Settlement Hub" for the sector where members collect, disseminate, and find the support and tools they need to do their job effectively.

To achieve this, the CoP will exist as a multifaceted **online platform** that allows users to:

- Access best-practice information and share resources on a wide variety of settlement topics.
- Locate the latest and most useful guides, tools, and research related to serving newcomers.
- Find up-to-date sector news and events.
- Connect settlement practitioners who might not otherwise have the opportunity to interact
- Enable dialogue among peers to explore new possibilities in order to deepen their knowledge and expertise and to learn how to things better

The CoP will also be the learning hub for the sector. The CoP will offer lifelong learning through self-learning, collaborative learning, the sharing of knowledge and experience, and by crowd-sourcing new ideas. Existing webinars and online e-courses that are useful for settlement practitioners will also be available from the CoP. The CoP will serve as a launching pad for **skills development** including:

- Ongoing series of webinars
- Assessment tools to identify gaps in core competencies
- Curated lists of topic and audience-specific resource and research
- Links to relevant online learning opportunities

The aim of the National Settlement Sector Community of Practice (CoP) is to bring together committed individuals who have a desire to work collaboratively to learn, share and build the capabilities of fellow settlement practitioners to assist newcomers' settlement and adjustment to their new life in Canada.

5.1.4 Project Background

OCASI will be leading the initiative funded by Immigration, Refugees and Citizenship Canada (IRCC) in partnership with the Project Management Team (PMT) consisting of representatives from COSTI Immigrant Services, MOSAIC BC, and ISANS (Immigrant Services Association of Nova Scotia). Governance is provided by the National Advisory Committee (NAC) consisting of OCASI staff, IRCC, PMT, our external Program Evaluator and the following umbrella settlement agencies from across Canada:

- Alberta Association of Immigrant Serving Agencies (AAISA)
- Atlantic Region Association of Immigrant Serving Agencies (ARAISA)
- Multicultural Centre of the Yukon
- Affiliation of Multicultural Societies and Service Agencies of BC (AMSSA)
- Inter-Cultural Association of Victoria
- La Table de concertation des organismes au service des personnes réfugiées et immigrantes
- Saskatchewan Association of Immigrant Settlement and Integration Agencies (SAISIA)
- Manitoba Association of Newcomer Serving Organizations (MANSO)

All bodies will be collaborating with settlement agencies and related organizations nationwide during all phases of the project.

The project was launched in September 2017. The first phase of the project encompassed a comprehensive Environmental Scan designed to capture the voice of the settlement sector across the country. It involved in-depth and broad sector-specific, communities of practice, and global research, a bilingual survey, case studies, and key informant interviews. In parallel to these needs assessment activities, technologies available for the development of CoP platforms were extensively researched and recommendations were made for the way forward.

The scope of this RFP encompasses the blueprinting, architecting, design, development, testing, and implementation of the CoP. The NAC and sector's vision, goals, objectives, and requirements mandate a robust, nimble, scalable state-of-the-art platform that will be sustainable for the longer-term. In order to have a very high level of confidence that the CoP will meet the expectations of the settlement sector across Canada now and well into the future, there will be a two-phase implementation strategy: a Beta site/pilot (which may be viewed as a MVP – Minimally-Viable Product) and a nationwide launch. The launch of the pilot/MVP community shall be planned for October 2018 and nationwide launch in March 2019.

5.2 Requirements

The CoP requirements have been elicited on the following basis:

- Mandatory requirements for the Beta/pilot (MVP).
- Mandatory requirements for the nationwide launch.

Refer to Appendix A that captures the CoP requirements.

While OCASI is open to proposals based on different technologies and approaches, the bidder must comprehend the mandatory requirements for the Beta/pilot (MVP) and launch. The bidder is also encouraged to address the optional and nice-to-have requirements and/or recommend additional features and functions to demonstrate added-value for the CoP.

5.2.1 Beta/pilot (MVP) Platform

The Beta/pilot (MVP) platform is intended to establish the foundation, core functionality, and key features for our community hub. It will be made available to the settlement sector in Ontario and BC for the purposes of evaluation with a continuous feedback loop and to promote engagement amongst practitioners.

5.2.2 Nationwide Launch Platform

The nationwide launch platform will build upon the Beta/pilot (MVP) platform. During the pilot (from October 2018 – March 2019), additional requirements (beyond those identified in Appendix A) may emerge based on feedback from community engagement by sector practitioners.

5.2.3 Sustain & Grow

Following the nationwide launch, the CoP will continue to be expanded and enhanced with new content, functionality, tools, and services to meet the growing and changing needs of the settlement sector and be a dynamic community for engagement by all practitioners and organizations involved directly or indirectly in the resettlement of newcomer Canadians.

5.3 Deliverables

5.3.1 CoP Platform Blueprint, Architecture and Design

As part of this deliverable, the successful Bidder will collaborate with OCASI project team, NAC, PMT, and other key stakeholders to blueprint, architect, and design the CoP platform. The platform will support the Beta/pilot (MVP), nationwide launch and long-term sustainability and growth of the community.

Activity	Deliverables
1 – Blueprint/Architecture	<ul style="list-style-type: none"> - Product: Architecture for the CoP Beta/pilot (MVP) - Product: Architecture for the CoP nationwide launch - Project: architecture documents (as per methodologies used)
2 – Design	<ul style="list-style-type: none"> - Product: Design for the CoP Beta/pilot (MVP) - Product: Design for the CoP nationwide launch - Project: Design Documents (as per methodologies used) - Project: Additional Requirements Documents (as per methodologies used) - Project: Test Plans and Cases for Beta/pilot (MVP) and nationwide launch

5.3.2 CoP Platform Development and Testing

As part of this deliverable, the successful Bidder will collaborate with OCASI project team, NAC, PMT, and other key stakeholders to develop and test the Beta/pilot (MVP) platform, incorporate additional requirements and user feedback into the Beta/pilot (MVP), and also develop and test the platform for nationwide launch.

Activity	Deliverables
1 – Beta/pilot (MVP) Platform	<ul style="list-style-type: none"> - Product: Source code for the CoP Beta/pilot (MVP) - Project: System documentation - Project: Implementation Plans - Project: Test Results - Project: Supporting artifacts
2 – Pilot Phase (after launch of Beta/pilot MVP platform up until nationwide launch)	<ul style="list-style-type: none"> - Product: Source code for the enhanced CoP Beta/pilot (MVP) - Project: System documentation - Project: Implementation Plans - Project: Test Results - Project: Supporting artifacts
3 – Nationwide Launch	<ul style="list-style-type: none"> - Product: Source code for the CoP nationwide launch - Project: System documentation - Project: Implementation Plans - Project: Test Results - Project: Supporting artifacts

5.3.3 CoP Implementation

As part of this deliverable, the successful Bidder will collaborate with OCASI project team, NAC, PMT, and other key stakeholders to implement the Beta/pilot (MVP) platform and the platform for nationwide launch.

Activity	Deliverables
1 – Beta/pilot (MVP) Platform	<ul style="list-style-type: none"> - Product: Beta/pilot (MVP) – live - Project: System documentation
3 – Nationwide Launch	<ul style="list-style-type: none"> - Product: Beta/pilot (MVP) – live - Project: System documentation

5.3.4 Oversight (for Duration of the Contract)

As part of this deliverable, the successful Bidder will report on project progress to OCAS on a weekly basis.

Activity	Deliverables
1 – Statement of Work	<ul style="list-style-type: none"> - Project: Approved Statement of Work (SOW)
2 – Status Updates	<ul style="list-style-type: none"> - Project: Weekly Status Reports - Project: Weekly Check-In Calls
3 – Communications	<ul style="list-style-type: none"> - Project: Risk Management - Project: Issues Management - Project: Change Management

APPENDIX A

NATIONAL SETTLEMENT SECTOR COMMUNITY OF PRACTICE (CoP)

REQUIREMENTS

1. Beta/Pilot (MVP)

1.1. Umbrella Requirements

Requirements – Pillar #1	
Name	Description
BR-001	The CoP will be a nationwide platform, including all provinces and territories.
BR-002	The CoP will comprehend Canada's two national languages.
BR-003	The CoP will provide a platform for shared knowledge.
BR-004	The CoP will provide a platform for peer-2-peer connection and communication.
BR-007	The CoP will provide a platform for addressing the needs of the settlement sector.
BR-008	The CoP will provide a platform that grows with the needs of the settlement sector.
BR-009	The CoP must make navigation simple and elegant.
BR-010	The CoP will provide a platform for plain language.
BR-011	The CoP will provide a platform that minimizes, ideally eliminates, technical constraints and impediments.
BR-012	The CoP will provide a platform free of contradictory information but allows for differing opinions and perspectives.
BR-013	The CoP will provide a platform on which updates are noticeable.
BR-014	The CoP will provide a platform that identifies resources by date, where applicable.
BR-015	The CoP will provide a platform for provincial regulations and services relevant to the settlement sector.
BR-016	The CoP must provide a robust search engine to take into account discoverability, search-ability and retrievability are important factors and that users search in many different ways to locate specific, rather than generic, information.
BR-018	The CoP will provide a platform for local resources and also interprovincial and cross-sector resources.

Requirements – Pillar #1

Name	Description
BR-019	The CoP may be a platform to provide tools to enhance staff capacity to deliver services.
BR-021	The CoP will be a platform with the ability to render location-specific resources.
BR-022	The CoP needs to establish a useful interoperable system of files names, metadata, and taxonomies that are applicable across the sector, so that questions such as the following can be answered: “We need mental health resources to assist newcomers in our service area, categorized by type of mental health issue, service language, government subsidies to consider”.
BR-023	The CoP must ensure that maintenance of documents is efficient and requires a minimal amount of time.
BR-024	The CoP must establish and maintain policies pertaining to sharing information and develop procedures that cover “where to post”, “what to post”, and “how to post”.
BR-025	The CoP must comprehend privacy laws and organizational policies pertaining to confidentiality and obtaining a client’s consent.
BR-026	The CoP platform must be secure.
BR-027	The CoP platform must provide quick and easy access to relevant information.
BR-028	The CoP must provide a robust method for data management, including, version control.
BR-029	The CoP must provide the ability to print resources.
BR-030	The CoP must correctly render on screen resources in multiple languages.
BR-031	The CoP must correctly render in print form resources in multiple languages.

1.2. Pillar #1 - Forum

Requirements – Pillar #1

Name	Description
BR1-001	The CoP will be a platform where practitioners can network.
BR1-002	The CoP will be a platform where practitioners can make new connections.
BR1-003	The CoP will be a platform where discussions about similar initiatives can take place.

1.3. Pillar #2 – Content Library

Requirements – Pillar #3	
Name	Description
BR2-001	The CoP must provide the capacity for Intellectual Property to be retained (e.g., for unique documents, authored documents available in the public domain, a mix of proprietary and publicly-available content).
BR2-002	The CoP must provide the capability to share resources with colleagues as easily as in email and with the “least amount of friction”.
BR2-003	The CoP must provide the capability to appropriately manage data according to stipulated classifications.
BR2-005	The CoP must make the right resources available to the right audience at the right time (i.e., so that the user is not presented with too much information).
BR2-007	The CoP must ensure that maintenance of documents is efficient and requires a minimal amount of time.
BR2-008	The CoP will be a platform with resources from IRCC and related immigration agencies.
BR2-011	The CoP will be a platform to provide information in multiple languages.
BR2-013	The CoP will be a platform with the ability to render location-specific resources.
BR2-014	The CoP will permit comments, questions and reviews being made of resources.

1.4. Pillar #3 – News and Updates

Requirements – Pillar #3	
Name	Description
BR3-001	The CoP will be a platform where news and events can be shared.
BR3-002	The CoP will be a platform where information about initiatives in various locales can be shared.
BR3-003	The CoP will be a platform for providing current events and press releases in the sector.
BR4-004	The CoP news and updates section will have social media sharing features allowing users to post on their social media accounts.

1.5. Pillar #4 – Forms & Curated Resources

Requirements – Pillar #4	
Name	Description
BR4-002	The CoP must provide the capability to download documents.
BR4-003	The CoP must provide the capability to open and view documents on screen using a standard tool (e.g., Adobe Acrobat).
BR4-004	The CoP must provide the capability to view and then print documents.
BR4-005	The CoP must provide the capability for version control for all documents.
BR4-006	The CoP must provide the capability to easily distinguish the most current version of any document.
BR4-008	The CoP will announce, or somehow otherwise indicate, whenever there is a new version of a form.
BR4-009	The CoP will provide a means by which the forms it hosts can be easily located.
BR4-011	The CoP will provide a platform for resources on specific topics (e.g., a legal clinic section).

1.6. Pillar #5 – Webinars & Professional Development

Requirements – Pillar #3	
Name	Description
BR5-001	The CoP will provide a platform for self-directed education on various topics.
BR5-003	The CoP will provide a platform for sharing information on group learning sessions.
BR5-004	The CoP will provide a platform for informal professional development (e.g., peer-to-peer learning, knowledge and experience sharing opportunities, chance to mentor colleagues, and team-building).
BR5-005	The CoP will provide a platform for general skills training.
BR5-008	The CoP will provide a platform for subject matter training.
BR5-009	The CoP will provide a platform for opportunities for training for paid staff and volunteers.
BR5-010	The CoP will provide a platform for identifying training sessions available by region with the corresponding format (online, webinar, in-person). This feature may be implemented via a calendar that is kept up-to-date.
BR5-011	The CoP will provide a platform to link to audio and video assets.
BR5-012	The CoP shall be a platform to share existing career and professional development resources rather than creating new resources by default.

1.7. Pillar #6 – Tools

Requirements – Pillar #6	
Name	Description
BR6-001	The CoP will be able to host or link to new web tools
BR6-002	The CoP will provide a platform for toolkits.
BR6-004	The CoP will provide a platform for sharing templates (e.g., Action Plans, Referral Forms).
BR7-006	The CoP will allow users to ask questions, post comments and review tools in conversation threads attached to the resource.

1.8. Non-Functional

Requirements – Pillar #6	
Name	Description
NFR-001	The CoP will be bound by all Canadian federal and provincial laws.
NFR-002	The CoP will be bound by the federal and provincial laws governing Canada's two national languages (English and French).
NFR-003	The CoP must be a platform that is a trusted place to share information.
NFR-004	The CoP shall provide a platform for which changes and upgrades are transparent to the users.

1.9. Account Management

Requirements – Pillar #6	
Name	Description
ACC-001	The CoP will allow users to create an account, tied to their email.
ACC-002	The CoP will allow users with an account to save resources and links to folders within their account.
ACC-003	The CoP will give account users a dashboard that filters the CoP based on their interests and region.
ACC-004	The CoP will display Biographical information that users provide in their account to other users who click on the respective user's profile.
ACC-005	The CoP will need to be signed in to their accounts to submit content, discussions or other anything else to the CoP.

2. Launch

2.1. Umbrella Requirements

Requirements – Pillar #1	
Name	Description
BR-001	The CoP will be a nationwide platform, including all provinces and territories.
BR-002	The CoP will provide a platform for the settlement sector; a “Settlement Hub”.
BR-003	The CoP will comprehend Canada’s two national languages.
BR-004	The CoP will provide a platform for shared knowledge.
BR-005	The CoP will provide a platform for knowledge co-creation.
BR-006	The CoP will provide a platform for peer-2-peer connection and communication.
BR-007	The CoP will provide a platform for networked learning.
BR-008	The CoP will provide a platform for learning circles.
BR-009	The CoP will be an aggregate of people in the settlement sector who come together around mutual engagement.
BR-010	The CoP will encompass practices – ways of doing things, ways of talking, beliefs, values, power relations – as the basis for mutual engagement.
BR-011	The CoP will provide a platform for addressing the needs of the settlement sector.
BR-012	The CoP will provide a platform that grows with the needs of the settlement sector.
BR-013	The CoP will provide a platform that will encompass all areas of settlement work.
BR-014	The CoP will allow to display information, pre-filtered, based on the url the user used to access the website.
BR-015	The CoP will provide a platform that encompasses work with newcomers in all of the following areas and/or stages of the resettlement journey.
BR-016	The CoP must make navigation simple and elegant.

Requirements – Pillar #1

Name	Description
BR-017	The CoP will provide a platform for plain language.
BR-018	The CoP will provide a platform that minimizes, ideally eliminates, technical constraints and impediments.
BR-019	The CoP will provide a platform free of contradictory information but allows for differing opinions and perspectives.
BR-020	The CoP will provide a platform on which updates are noticeable.
BR-021	The CoP will provide a platform that identifies resources by date, where applicable.
BR-022	The CoP will provide a platform for relevant information.
BR-023	The CoP will provide a platform for provincial regulations and services relevant to the settlement sector.
BR-024	The CoP must provide a robust search engine to take into account discoverability, search-ability and retrieve-ability are important factors and that users search in many different ways to locate specific, rather than generic, information.
BR-025	The CoP will provide a platform with access to online tools.
BR-026	The CoP will provide a platform for local resources and also interprovincial and cross-sector resources.
BR-027	The CoP will provide a platform for integration for umbrella agencies and other organizations without the need to replace current toolsets (e.g., LIPs user Basecamp).
BR-028	The CoP may be a platform to provide tools to enhance staff capacity to deliver services.
BR-029	The CoP will be a platform for a centralized “one-stop” library for online resources.
BR-030	The CoP will be a platform with the ability to render location-specific resources.
BR-031	The CoP needs to establish a useful interoperable system of files names, metadata, and taxonomies that are applicable across the sector, so that questions such as the following can be answered: “We need mental health resources to assist newcomers in our service area, categorized by type of mental health issue, service language, government subsidies to consider”.
BR-032	The CoP must ensure that maintenance of documents is efficient and requires a minimal amount of time.
BR-033	The CoP must establish and maintain policies pertaining to sharing information and develop procedures that cover “where to post”, “what to post”, and “how to post”.
BR-034	The CoP must comprehend privacy laws and organizational policies pertaining to confidentiality and obtaining a client’s consent.

Requirements – Pillar #1

Name	Description
BR-035	The CoP platform must be secure.
BR-036	The CoP platform must provide quick and easy access to relevant information.
BR-037	The CoP must provide a robust method for data management, including, version control.
BR-038	The CoP must provide the ability to print resources.
BR-039	The CoP must correctly render on screen resources in multiple languages.
BR-040	The CoP must correctly render in print form resources in multiple languages.
BR-041	The CoP must be optimized to render on smartphones.
BR-042	The CoP must identify and negotiate a shared space with existing CoPs/hubs.
BR-043	The CoP is a platform for other CoPs for specific interest groups (e.g., Local Immigration Partnerships – LIPs).

2.2. Pillar #1 - Forum

Requirements – Pillar #1

Name	Description
BR1-001	The CoP will be a platform where practitioners can network.
BR1-002	The CoP will be a platform where practitioners can make new connections.
BR1-003	The CoP will be a platform where discussions about similar initiatives can take place.
BR1-004	The CoP will be a platform where Francophones will be able to maintain affinity with their community in an Anglo-dominant environment.
BR1-005	The CoP will provide a platform for Q&A between users.

2.3. Pillar #2 – Content Library

Requirements – Pillar #2

Name	Description
BR2-001	The CoP must provide the capacity for Intellectual Property to be retained (e.g., for unique documents, authored documents available in the public domain, a mix of proprietary and publicly-available content).

Requirements – Pillar #2

Name	Description
BR2-002	The CoP must provide the capability to share resources with colleagues as easily as in email and with the “least amount of friction”.
BR2-003	The CoP must provide the capability to appropriately manage data according to stipulated classifications.
BR2-004	The CoP must provide the capability for users to share when English and French are not their mother tongues (e.g., spelling and grammar tools).
BR2-005	The CoP must make the right resources available to the right audience at the right time (i.e., so that the user is not presented with too much information).
BR2-006	The CoP must ensure there is no duplication of documents.
BR2-007	The CoP must ensure that maintenance of documents is efficient and requires a minimal amount of time.
BR2-008	The CoP will be a platform with resources from IRCC and related immigration agencies.
BR2-009	The CoP will provide contact information (addresses, phone numbers, etc.) for government agencies, settlement agencies, and other services.
BR2-010	The CoP will provide information about new funding opportunities, deadlines and forms for submission of proposals.
BR2-011	The CoP will be a platform for pro-tips including, but not limited to the following: <ul style="list-style-type: none"> - Software troubleshooting; ideas for activities and programming (groups, children, youth, etc.); how to write and prepare letters; successful proposals and contracts; grammar and writing tips; how to write manuals; how to efficiently work with digital files including file conversions for sharing; teaching materials; lesson plans; other teaching resources; poster ideas; tips to help children problem solve on their own.
BR2-012	The CoP will be a platform to provide information for language and translation services.
BR2-013	The CoP will be a platform to provide information in multiple languages.
BR2-014	The CoP will be a platform for a centralized “one-stop” library for online resources. (It will either link or contain information / OR mix of both)
BR2-015	The CoP will be a platform with the ability to render location-specific resources.
BR2-016	The CoP will permit comments, questions and reviews being made of resources.

2.4. Pillar #3 – News and Updates

Requirements – Pillar #3

Name	Description
BR3-001	The CoP will be a platform where news and events can be shared.
BR3-002	The CoP will be a platform where information about initiatives in various locales can be shared.
BR3-003	The CoP will be a platform for providing current events and press releases in the sector.

Requirements – Pillar #3

Name	Description
BR4-004	The CoP news and updates section will have social media sharing features allowing users to post on their social media accounts.
BR5-005	The CoP will allow users to open a discussion thread or comment under a news pieces.

2.5. Pillar #4 – Forms & Curated Resources

Requirements – Pillar #4

Name	Description
BR4-001	The CoP must provide the capability to upload documents.
BR4-002	The CoP must provide the capability to download documents.
BR4-003	The CoP must provide the capability to open and view documents on screen using a standard tool (e.g., Adobe Acrobat).
BR4-004	The CoP must provide the capability to view and then print documents.
BR4-005	The CoP must provide the capability for version control for all documents.
BR4-006	The CoP must provide the capability to easily distinguish the most current version of any document.
BR4-007	The CoP will provide the most current versions of forms from government agencies such as, although not limited to: IRCC, CRA, EI, and EIA.
BR4-008	The CoP will announce, or somehow otherwise indicate, whenever there is a new version of a form.
BR4-009	The CoP will provide a means by which the forms it hosts can be easily located.
BR4-010	The CoP will provide a platform on which related IRCC information is accessible in one place (i.e., IRCC has essential information on different webpages, requiring multiple Google searches to locate specific information).
BR4-011	The CoP will provide a platform whereby current sector trends can be showcased.
BR4-012	The CoP will provide a platform for resources on specific topics (e.g., a legal clinic section).
BR4-013	The CoP will provide a platform for sharing Fact Sheets.
BR4-014	The CoP will provide a platform for a directory of locally-situated service providers, colleagues, and service providers in other areas of settlement work.
BR4-015	The CoP will provide a platform for making documents accessible in multiple languages (e.g., articles regarding bed bugs, head lice, or counselling services).
BR4-016	The CoP will allow for users to post conversations about the forms and curated resources (e.g., ask one another about the quality or relevance of the resources).

2.6. Pillar #5 – Webinars & Professional Development

Requirements – Pillar #5	
Name	Description
BR5-001	The CoP will provide a platform for self-directed education on various topics.
BR5-002	The CoP will provide a platform for sharing best practices, methods, and tools inter-provincially and cross-sector.
BR5-003	The CoP will provide a platform for sharing information on local conferences.
BR5-004	The CoP will provide a platform for sharing information on interprovincial conferences.
BR5-005	The CoP will provide a platform for sharing information on group learning sessions.
BR5-006	The CoP will provide a platform for informal professional development (e.g., peer-to-peer learning, knowledge and experience sharing opportunities, chance to mentor colleagues, and team-building).
BR5-007	The CoP will provide a platform for sharing information about seminars.
BR5-008	The CoP will provide a platform for general skills training.
BR5-009	The CoP will provide a platform for career advancement and progression advice and options (e.g., Alberta certificate program).
BR5-010	The CoP will provide a platform for information about formal education option: degrees, certifications and credentials.
BR5-011	The CoP will provide a platform for subject matter training.
BR5-012	The CoP will provide a platform for opportunities for training for paid staff and volunteers.
BR5-013	The CoP will provide a platform for identifying training sessions available by region with the corresponding format (online, webinar, in-person). This feature may be implemented via a calendar that is kept up-to-date.
BR5-014	The CoP will provide a platform to collaborate on the development of new best practices.
BR5-015	The CoP will provide a platform to propose new best practices.
BR5-016	The CoP will provide a platform to link to audio and video assets.
BR5-017	The CoP shall be a platform to share existing career and professional development resources rather than creating new resources by default.
BR5-018	The CoP shall permit users to leave reviews of their experience with webinars or ask questions of their organizers.
BR5-019	The CoP will allow users to post associated files with webinars and professional development opportunities.

2.7. Pillar #6 – Tools

Requirements – Pillar #6	
Name	Description

BR6-001	The CoP will be able to host or link to new web tools
BR6-002	The CoP will be a repository of forms.
BR6-003	The CoP will provide a platform for toolkits.
BR6-004	The CoP will provide a platform for calendars (local, regional meetings, workshops, webinars, conferences and other activities relevant to community users, e.g., grant deadlines).
BR6-005	The CoP will provide a platform for an IRCC toolkit with up-to-date information on policies and processes.
BR6-006	The CoP will provide a platform for sharing templates (e.g., Action Plans, Referral Forms).
BR6-007	Ref: BR6-004. Resource Kits for Newcomers will include activities and workshop ideas, be in plain language and appropriate language (multi-lingual) and contain orientation documents – driver’s guide, legal information, employment, health, and crisis help – and the most needed forms for newcomers.
BR6-008	Re: BR6-006. Calendars should be filterable by local area, regional, provincial, Canada-wide or global.
BR7-009	The CoP will allow users to ask questions, post comments and review tools in conversation threads attached to the resource.

2.8. Non-Functional

Requirements – Non-Functional	
Name	Description
NFR-001	The CoP will be bound by all Canadian federal and provincial laws.
NFR-002	The CoP will be bound by the federal and provincial laws governing Canada’s two national languages (English and French).
NFR-003	The CoP must be a platform that is a trusted place to share information.
NFR-004	The CoP shall provide a platform for which changes and upgrades are transparent to the users.

2.9. Account Management

Requirements – Account Management	
Name	Description
ACC-001	The CoP will allow users to create an account, tied to their email.
ACC-002	The CoP will allow users with an account to save resources and links to folders within their account.
ACC-003	The CoP will give account users a dashboard that filters the CoP based on their interests and region.
ACC-004	The CoP will display Biographical information that users provide in their account to other users who click on the respective user’s profile.
ACC-005	The CoP will need to be signed in to their accounts to submit content, discussions or other anything else to the CoP.

APPENDIX B

NATIONAL SETTLEMENT SECTOR COMMUNITY OF PRACTICE (CoP)

SETTLEMENT SECTOR BACKGROUND

OCASI's publication "The Development of Service and Sectoral Standards for the Immigrant Services Sector" (http://atwork.settlement.org/downloads/Development_Sectoral_Standards.pdf) provides the following overview of settlement, the settlement sector, and its service offerings to newcomers to Canada.

Defining Immigrant Settlement

Several working definitions of settlement and settlement work co-exist in the sector, such as: Settlement is a process or a continuum of activities that a new immigrant/refugee goes through upon arrival in a new country. This process includes the following stages:

- Adjustment: acclimatizing and getting used to the new culture, language, people and environment or coping with the situation
- Adaptation: learning and managing the situation without a great deal of help
- Integration: actively participating, getting involved and contributing as citizen of the new country.

Integration is defined as the ability to contribute, free of barriers, to every dimension of Canadian life, that is, economic, social, cultural and political. The goal of settlement is for every immigrant to have full freedom of choice regarding her level of participation in the society. If the immigrant wants to participate actively in the society, there are no systemic barriers preventing her from doing so, and there are mechanisms in place to positively facilitate this process. It is generally accepted that the process of settlement and adaptation is a two-way process that involves changes in the newcomer and host society.

Definition of the Sector

The community-based immigrant settlement sector is composed of agencies whose mandate is to provide both diverse and specialized services to immigrants and refugees. These organizations provide a wide range of essential services to assist a culturally, linguistically and religiously diverse population of immigrants and refugees in the process of settlement and integration. In response to the unique realities and changing needs of communities, volunteers and staff at these agencies have developed unique, culturally sensitive and professional programs. Many of these programs are not available from the larger public service institutions; some have provided models for these institutions; and others help these institutions make their services accessible.

Settlement Services and Programs

Settlement services are specialized services geared to facilitate the full and equitable participation of all newcomers in Canadian society. The sector, in response to immigrant community needs, has responded with a myriad of diverse and innovative services targeting, for example, the needs of women, youth, children, foreign-trained professionals, families, etc. Some of the most frequently provided services include:

- Settlement Counselling Services: reception, orientation, interpretation, translation, referrals, documentation, and long-term adjustment
- Language and Citizenship Training: instruction in English and/or French, citizenship classes, and employment-related language training
- Employment Services: vocational or career counselling, skills training, resume preparation, job referrals, work placement, and workplace orientation

- Social Support Services: individual and family counselling, family and child services, crisis intervention, and financial counselling
- Health Services: health promotion, HIV/AIDS education and prevention, peer support groups, mental health counselling and support services
- Legal Assistance: immigration, housing, income maintenance, employment standards, workers' compensation, family law, and law reform
- Community Participation: community outreach, public forums, needs assessments, advocacy on access issues, production of educational materials, and community development.

The work of immigrant service agencies is fundamentally about breaking down barriers which often prevent immigrants from reaching their full potential as participants and contributors to Canada's prosperity and economic growth.

Recent Findings

As part of the Environmental Scan (needs assessment) performed in early 2018, a national survey was conducted. Respondents were asked: "What areas of settlement work and services are you most associated with?" A very broad range of responses was provided:

Client Advocacy, All Newcomers, Education, Employment, Front-line Work, Funding Partners, Health, Housing, Indigenous Communities, Interprovincial Migrants, Language, LGBTQIA+, Legal, Local Immigration Partnership (LIP), Public Institutions, Seniors, Temporary Foreign Workers, Refugee Services, Umbrella Agencies, Women, Youth, Mental Health and Addictions, and Violence Against Women (VAW).

Respondents were also asked about the work settlement practitioners performed with newcomers. The responses were similarly diverse: Pre-Arrival Services, Orientation and Needs Assessment, Community Connections, Career Counselling, Bridging Programs, Francophone Immigration, Language Assessment, Translation and Interpretation, Citizenship Support, Newcomer Settlement, Housing Services, Child Care Services, Settlement Counselling, Social Support Services, Crisis and Trauma.