

## **2015 Evaluation Case Competition**

### **Preliminary Round Case: Immigrant Women Services Ottawa (IWSO) — Settlement and Integration Services**

**February 7, 2015**

The Request for Proposals in this document was developed for the Student Evaluation Case Competition for educational purposes. It does not entail any commitment on the part of the Canadian Evaluation Society (CES) or the program's agency, funder or any related service delivery partners.

We thank IWSO for graciously agreeing to let us use this program for Round 1 of the 2015 competition. We also thank Mercy Lawlivi, Manager, Settlement and Integration Services, for providing the material to support this case.

#### **Student Evaluation Case Competition Sponsors**

Canadian Evaluation Society

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## Introduction

Welcome to the Preliminary Round of the 2015 CES/CESEF Student Case Competition!

Here is the scenario for this round:

Your consulting firm has been invited to respond to the attached Request for Proposals (RFP) for an evaluation of a program introduced in 2009-10.

Settlement and Integration Services is a program delivered through an Ottawa registered charitable organization, Immigrant Women Services Ottawa (IWSO). The program's aim is to assist newcomer women in settling into their new lives in Canada, developing a sense of belonging and securing employment.

IWSO is interested in an evaluation of the program to assess outcomes and whether service delivery could be improved. Your proposal should include your understanding of the assignment, a logic model assessment and, if required, a revised logic model, a methodology, an evaluation matrix, a mitigation strategy to address anticipated challenges, and up to five evaluation competencies you will be drawing upon.<sup>1</sup> Section 2.1 of the RFP identifies the proposal requirements in more detail.

The Steering Committee will assess proposals using the criteria identified in section 2.2 of the RFP. Three proposals will be short-listed.

We look forward to your submission at the end of the day.

*The CES Student Case Competition Working Group and Case Selection Sub-Committee: Bea Courtney, Brian McGowan, Patricia King, Kathryn Radford, Marla Steinberg and Sharon Margison.*

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<sup>1</sup> A list of evaluation competencies is posted at the CES website under Professional Designations: try [http://www.evaluationcanada.ca/site.cgi?s=5&ss=11&\\_lang=EN](http://www.evaluationcanada.ca/site.cgi?s=5&ss=11&_lang=EN); en français : [http://www.evaluationcanada.ca/site.cgi?s=5&ss=11&\\_lang=fr](http://www.evaluationcanada.ca/site.cgi?s=5&ss=11&_lang=fr).

## Rules

1. The team's designated contact person will receive an e-mail from Case Competition organizers indicating a website and team identification number for retrieval of the case.
2. Teams can begin work on the case upon receipt of the document from the contact person.
3. Submissions may be in either official language.
4. The submission must be uploaded as a **PDF** file to the same website **no later than 5 hours and 30 minutes** after initial download from the website.
5. Coaches must not communicate with their teams once the case document has been downloaded and distributed to the team.
6. Judges must not be able to identify team members. Throughout their submission, teams should refer to themselves only by an imaginative, non-revealing code name, such as Noble Consultants, and must **not** identify the university, city or province/territory where the team is located.
7. Your submission should be saved as **[your team name].pdf**, e.g. Noble Consultants.pdf.
8. Judges may take up to six weeks to select the three best submissions. All teams will receive feedback.

## Questions or Problems

To communicate with organizers on the day of the competition, please email [casecomp@evaluationcanada.ca](mailto:casecomp@evaluationcanada.ca), or call one of the following individuals:

Name	Telephone Number	Times Available (EST)
Patti King (enquiries in English)	709-746-2875	8:00 am to 6:00 pm
Martine Perrault (demandes de renseignements en français)	613-897-7074	8:00 am to 6:00 pm

**Have fun and good luck!**

# **Request for Proposals: IWSO's Settlement and Integration Services**

February 7, 2015

## **1.0 Program Profile**

### **1.1 *About Immigrant Women Services Ottawa (IWSO)***

Immigrant Women Services Ottawa (IWSO), established in 1988, is a registered charitable organization serving immigrant and visible minority women in the Ottawa area. It aims to create positive changes in women's lives by providing culturally-responsive, timely and integrated services to achieve the following:

- Help immigrant women and their children overcome abusive, violent situations
- Empower immigrant women to reach their full potential.

For many years, IWSO focused solely on providing services to immigrant women who were victims of violence, through its Crisis Intervention and Counselling program. In more recent years, the agency broadened its mandate to include two other key areas of service: Settlement and Integration, and Language Interpretation and Translation. These two programs align with the agency's second objective of empowering immigrant women to reach their full potential.

Settlement and Integration Services, introduced in 2009-10 and funded by Citizenship and Immigration Canada (CIC), will complete its sixth year in 2014-15. IWSO would like an evaluation of the program to assess outcomes and whether delivery of any of the services could be improved.

### **1.2 *Settlement and Integration Services***

The objective of these services is to provide immigrant women – specifically permanent residents, convention refugees or live-in caregivers – with the necessary supports to ensure successful integration into their new life in Ottawa. The program serves both immigrants who have encountered abuse or other violence, such as war, and those who have not. Clients represent a wide range of backgrounds, with each woman having unique settlement needs based on such factors as motivation for seeking immigration, life experiences to date, educational background, individual expectations and so forth.

IWSO's Settlement and Integration Services recognizes that newcomer women benefit from assistance in settling into their new lives in Canada and developing a sense of belonging. It understands the challenges of adjusting to a new language, a new culture and new surroundings. The program provides information, referrals and access to community resources and skills training. Such support must be practical and accurate, with timely information and appropriate referrals to help newcomer women meet their immediate settlement needs. The intent is to empower clients to settle and integrate into their community successfully, enabling them to contribute socially, economically and culturally to their new city. Settlement and Integration Services encompass the following elements:

- ❖ Needs Assessment and Referral
- ❖ Newcomer Orientation
  - One-on-One Counselling
  - Group Information/Orientation Sessions
  - Social and Recreational Activities
    - Arts and Crafts Circle
    - Yoga for Newcomer Women
- ❖ Employment Services
  - Job Search Workshops
  - French Conversation Circles
- ❖ Computer Training Program
- ❖ Care for Newcomer Children

Women learn about these services from such sources as other community agencies, word of mouth, flyers, program outreach and promotional events and social media, such as Facebook. A few women have connected with the program prior to arriving in Canada, via IWSO's website, and have received pre-arrival assistance.

### **1.2.1 Needs Assessment and Referral**

The individual needs of each new client are assessed in order to tailor information, referrals and services to the newcomer's specific circumstances. When the assessment indicates multiple referrals are required, the client receives a settlement plan. This component and Newcomer Orientation are the program's core services. The number of new clients increased from 185 in the first year to an average of 335 for the three years from 2011-12 through 2013-14.

## **1.2.2 Newcomer Orientation**

### ***One-on-One Counselling***

Two settlement counsellors provide services to new and existing clients to help them learn about the city, find affordable housing, locate the right school for their children, access important community resources and develop a network of friends. The counsellors help clients acquire English or French language skills, begin their job search and secure their first professional job.

### ***Group Information/Orientation Sessions***

These sessions are organized in partnership with other community agencies to provide newcomer women with information on various settlement issues and as a way of removing them from isolation and integrating them within their community. The sessions help newcomer women to understand life in Canada, including laws, rights and responsibilities. Some of the topics discussed include the following: credentials assessment, starting your own business, having a career in home child care, cancer screening, human trafficking, identity theft and fraud, self-defence for women, and immigration policies and legal implications. The sessions are popularly called Friendship Circles. For the two years 2012-13 and 2013-14, the program held 22 and 24 sessions respectively, serving an average of 330 women each year.

### ***Social and Recreational Activities***

Arts and Crafts Circles, run entirely by volunteers, provide a platform for newcomer women who are artistically inclined. Single women, stay-at-home mothers or sole support parents, or those who feel alone and isolated in their new community, can socialize and make new friends while learning and creating art. This activity is both recreational and therapeutic, especially for women who have experienced abuse or war.

IWSO offers 'Free Yoga for Women'. This is made possible by the generosity and commitment of certified yoga instructors who volunteer their time and expertise. Newcomer women benefit from the many positive effects of yoga, such as stress reduction, flexibility, strength and increased energy. Feedback from clients indicates that they are very appreciative of the program and the great feeling of wellbeing that yoga gives them. This activity has been offered on a weekly basis starting in 2013-14, and was offered every other week previously.

## **1.2.3 Employment Services**

### ***Job Search Workshops***

Each year, hundreds of skilled foreign workers are welcomed to Ottawa. However, many are not familiar with the Canadian work environment and the tools needed to compete effectively for jobs for which they have the required skills. Settlement and

Integration Services works in partnership with World Skills, another Ottawa-based non-profit organization, to offer Job Search Workshops to help newcomers integrate into the Canadian labour market. For the two years 2012-13 and 2013-14, the program delivered 15 and 16 workshops respectively for newcomer clients, with an average of 149 clients each year.

The workshops are designed to provide clients with the skills and tools they need to address the following aspects of an effective job search: knowledge of the Canadian job environment and the local labor market; effective job search skills and Canadian employer expectations; successful résumés and cover letters; connecting to one's chosen field and finding suitable positions; and making a strong impression in interviews. One-on-one assessments with an employment counsellor are available to determine next steps and develop an individualized action plan for success in Canada. Clients have access to a fully computerized environment.

### ***French Language Skills***

Newcomer women in the first couple of years of the program identified a lack of French language skills as a significant barrier to employment. Many stated that their efforts to find employment were often stifled as a result. In response to clients' repeated requests for French language training with other immigrant women to learn or improve their French language skills, Settlement and Integration Services introduced French Conversation Circles in July 2011. Although the focus is on French oral expression, activities also include listening, reading and writing. Evaluations conducted through tests and client feedback indicated a significant improvement in French language skills.

### **1.2.3 Computer Training Program**

In today's world, computer illiteracy is a serious barrier to accessing employment. Labour market trends indicate the necessity for employees to have computer skills in order to compete in the job market. For many newcomer women, this barrier to employment hinders their efforts to successful economic and social integration. Settlement and Integration Services offers three levels of computer training to equip newcomer women with the computer skills needed to compete effectively in the Canadian labour market.

Level 1 covers computer basics, including keyboarding, an introduction to MS Word, résumé preparation, the Internet and e-mail. Level 2 covers desktop management, MS Word, an introduction to MS Excel, online photo albums and Internet smarts, including copyright and shopping. Level 3 covers more advanced aspects of MS Word and MS Excel, as well as MS PowerPoint and social media.

For the two years 2012-13 and 2013-14, an average of 222 women participated each year in the three levels of training. An average of 89% successfully completed their training, with an average of 97% stating that their understanding and use of computers increased tremendously.

#### **1.2.4 Care for Newcomer Children**

Settlement and Integration Services provides qualified Early Childhood Educators (ECE) to take care of its clients' children, as well as those of two other agencies in the building, World Skills and the Catholic Centre for Immigrants. Children are provided with a safe, clean, tidy and well-ventilated space to play and learn while their parents meet with settlement counsellors or attend other programs or activities for newcomers in the building. Activities are designed to enhance fine- and gross-motor skills, as well as music, movement, language, social and cognitive skills. Language skills are enhanced through songs, stories, actions and table activities. Children can explore their creative art, sensory, experimental, role-playing skills and more. The centre provides many multicultural toys, storybooks and resources.

### ***1.3 Stakeholders, Governance and Resources***

Program clients and their families are key stakeholders, being the immediate and direct beneficiaries. Other key stakeholders include IWSO, CIC, and World Skills, a service established in 1997 to simplify, coordinate and facilitate delivery of employment services for newcomers in the Ottawa area. Ultimately, the community at large and local services and employers also benefit.

IWSO's Manager, Settlement and Integration Services reports to IWSO's Executive Director, who reports to the Board of Directors. The Board is responsible for the stewardship of the organization, providing leadership to oversee the management of IWSO's business and affairs and to grow value responsibly, in a sustainable manner.

Program funding is provided by the federal government through CIC's Immigrant Settlement and Adaptation Program. IWSO's Settlement and Integration Services annual budget of \$293,752 covers four full-time employees (two settlement counsellors and two ECE staff), 0.2 full-time management/ supervisory staff, and 0.2 of a full-time computer instructor. Delivery of Social and Recreational Activities (Arts and Crafts Circles, Yoga for Newcomer Women) and French Conversation Circles depends entirely on activity leaders and session instructors volunteering their time. Altogether, the program relies on 10 to 15 volunteers to deliver these services.

### ***1.4 Program Logic Model***

The program's logic model is presented on the following page.

## IWSO Settlement and Integration Services Logic Model

Target Group	Activities	Inputs	Outputs: Targets for 2014-15	Outcomes		
				Short Term	Intermediate	Long Term
Client Group	Activities/Tasks	Resources	Deliverables	Learning	Action	Conditions
Immigrant women: – Permanent Residents – Convention Refugees – Live-in Caregivers	<p><b>Needs Assessment and Referrals</b></p> <p>↓</p> <p>Provide initial intake and needs assessment</p> <p>↓</p> <p>Provide referrals to appropriate CIC-funded and community agencies based on identified needs</p> <p>↓</p> <p><b>Information and Orientation</b></p> <p>↓</p> <p>Facilitate information/orientation sessions</p> <p>Participate in social networking, outreach and promotion activities</p> <p>↓</p> <p><b>Support Services</b></p> <p>Provide childcare, Settlement counselling, Interpretation and Translation as needed</p>	<p><b>STAFF</b></p> <p>4.0 FTE staff per year to provide settlement services and childcare</p> <p>.2 FTE Management/Supervisory staff</p> <p>.2 FTE computer instructor</p> <p><b>Volunteers</b></p> <p>10-15 volunteers to assist with activities and programs</p> <p><b>Materials</b></p> <p>Develop new information materials and research other appropriate materials</p> <p><b>Technology</b></p> <p>Utilize existing technology – however, regular maintenance and upgrading is required</p> <p><b>Partnerships</b></p> <p>Develop partnerships</p> <p><b>Activities</b></p> <p>Develop activities to meet client needs</p>	<p># women to be served – 400 (approx.)</p> <p># initial needs assessments – 400 (approx.)</p> <p># subsequent client visits – 1000 (approx.)</p> <p># referrals within the agency – 75 (approx.)</p> <p># information sessions on CIC services – 8</p> <p># information sessions on community services – 8</p> <p># information sessions on rights and obligations of residents – 8</p> <p>Total # of sessions – 24</p>	<p>* Client are able to access settlement services</p> <p>* Clients receive information and referrals based on identified individual needs.</p> <p>*Clients become aware of CIC settlement services and community agencies</p> <p>*Clients receive individual settlement counselling</p> <p>*Clients participate in information sessions and become more knowledgeable about community resources</p> <p>*Clients have developed a more positive attitude in spite of traumatic life experiences</p> <p>*Clients develop new skills</p>	<p>*Clients have accurate information to make informed settlement choices.</p> <p>*Clients have a better understanding of life in Canada including laws, rights and responsibilities</p> <p>*Clients have developed new skills that foster their independence</p> <p>*Clients broaden their networks and become resourceful and proud of their individual strengths</p> <p>*Clients become motivated to pursue their goals and move towards self-sufficiency</p>	<p>*Clients become thriving members of the community who enjoy their rights and act on their responsibilities</p> <p>*Clients have successfully integrated into the community</p> <p>*Clients have improved socio-economic status</p> <p>*Clients are self-empowered and see themselves as mentors to other newcomer women</p>

## 2.0 Scope of Work

The Steering Committee is seeking a consulting team to undertake an evaluation of IWSO's Settlement and Integration Services program to assess its performance, especially with respect to long-term outcomes, and whether delivery of any of the services could be improved. The findings should speak to the program's relevance as well, although this is not a key focus for the evaluation. While IWSO has done some follow up with clients to find out how they are doing and if they are facing any particular challenges, there has been no formal evaluation of the program, and program outcome indicators need to be determined as part of the evaluation. IWSO is undertaking the evaluation on its own initiative. There is no requirement in the funding agreement with CIC for an evaluation, and hence no departmental evaluation requirements to address.

IWSO senior management and the Board's Policy and Program Committee are interested in increasing their own evaluation capacity to improve their understanding of what constitutes a good evaluation, effective logic models and appropriate program outcome indicators. That is, they want to be better positioned a) to oversee consultants undertaking evaluations, from planning through reporting, and b) to be able to assess logic models and program outcome indicators for their effectiveness. Given an already demanding workload, the capacity building work should be carried out in an efficient manner and not unduly burden staff and board members.

The Committee estimates that it will take 30 to 40 days of consultant time to undertake this evaluation.

### 2.1 *Proposal Requirements*

The Steering Committee expects proposals from your consultant team to include (but not be limited to) the following components:

1. An overview of your understanding of the Settlement and Integration Services program and the evaluation requirements.
2. An assessment of whether the current logic model requires any adjustments, and if so, a revised logic model with a brief explanation of how it is an improvement.
3. A detailed description of how you would undertake the evaluation (approach and data collection methods), ensure cultural competency, and support evaluation capacity building of agency officials.
4. An evaluation matrix that includes a list of key evaluation questions along with one to three indicators per level of outcome (i.e. short term, intermediate and long term) in the logic model to be used for the evaluation, clearly indicating which indicator is linked to which outcome.
5. Anticipated methodological challenges, and how you propose to deal with them.

6. A brief description of how your team has demonstrated up to five Credentialed Evaluator competencies in developing its proposal.

The Steering Committee does not require that proposals include a budget.

Proposals **must** meet the following technical specifications:

- Maximum of (12) pages. This limit excludes the cover letter, cover page and table of contents. **Text over 12 pages, including any appendices, will not be read or scored;**
- Standard paper size (US letter);
- 12 point minimum font size for text;
- Sum of left and right margins to be at least 6.2 cm. Examples: a) left 3.1, right 3.1 cm; b) left 2.9, right 3.3 cm; *et cetera*;
- Sum of top and bottom margins to be at least 5.2 cm. Examples: a) top 2.6, bottom 2.6 cm; b) top 3.1, bottom 2.1, *et cetera*;
- For tables and figures the minimum font size is 10 point and minimum side margin is 2 cm.

## 2.2 Judging Criteria

The criteria by which submissions will be assessed are as follows:

Criteria	Weight
<b>Understanding of the requirement:</b> Demonstration of an understanding of Settlement and Integration Services and IWSO's evaluation needs (beyond a reiteration of the text provided in the RFP)	10%
<b>Logic model assessment:</b> Strength of discussion of the appropriateness or limitations of the current logic model, and if a revised model is proposed, its clarity, completeness and appropriateness	10%
<b>Methodology:</b> Appropriateness of the approach and data collection methods for undertaking the evaluation, and the means for ensuring cultural competency and supporting evaluation capacity building	25%
<b>Evaluation matrix:</b> Appropriateness and clarity of evaluation questions, and appropriateness and feasibility of program outcome indicators	25%
<b>Challenges and mitigation strategy:</b> Clarity and appropriateness of the assessment of methodological challenges and the mitigation strategy	10%
<b>Competencies for Canadian evaluation practice:</b> Clarity and appropriateness of the competencies identified	5%
<b>Innovation:</b> Innovative ideas	5%
<b>Proposal:</b> Quality of the proposal (writing and format)	10%
<b>Total</b>	<b>100%</b>