Building Quality Justice Services for Newcomers

Training and Knowledge Sharing: Guidelines

This document has been developed as part of the CCR's Quality of Services project which aims to support NGOs serving immigrant and refugee communities to provide high-quality services in areas related to immigration and refugee legal processes. For more information, please see the Project Framework.

Organizations are encouraged to use this document when reviewing existing policies or developing new ones. These guidelines may also apply to organizational processes or practices, particularly if written down (even if not in the form of a "policy").

Organizations need mechanisms for training and knowledge sharing in all areas of their services. This project, and these guidelines, are designed to focus on **services related to immigration and refugee law, such as helping people with immigration applications**. The guidelines can be used to help assess whether existing mechanisms are appropriate to this service area or to develop new mechanisms.

The ultimate goal of the CCR project is to elevate the quality of services provided by organizations to clients within the immigration and refugee processes.

FONDS McLACHLIN FUND

Objectives

These guidelines are designed to help the organization meet the following objective taken from the Proposed framework for high quality immigration and refugee services:

- **Relevant Knowledge and Skills:** The organization and individuals within the organization who assist people in refugee, immigration and citizenship processes have the relevant knowledge and skills.

Please note

- Some of the suggestions below might not reflect the reality in all organizations. We recognize that each organization's realities are different. Organizations should choose, modify or add elements that reflect their circumstances.

- In working through the points below, consider whether the organization's training and knowledge sharing mechanisms respond specifically to **services assisting people with immigration and refugee legal processes.**

Notes on terms

- Some organizations regularly use the term "clients" while others prefer to use different language. To reflect this diversity, we refer sometimes to "clients" and sometimes to "service users".

- In some organizations staff, interns and volunteers all provide services relating to immigration and refugee legal processes – they all need training and access to information. In order to avoid repetition of "staff, interns and volunteers", we sometimes use "people" where the context makes clear we are referring to "staff, interns and volunteers".

A. Training

1. Onboarding training

a. There are standard training programs on immigration and refugee processes

- Is there a standard training program on immigration and refugee processes designed and offered to all staff, interns or volunteers who are beginning to work with the organization on services related to immigration and refugee legal processes?

- Are there are specialized training programs adapted to specific positions based on the types of processes they are helping with, or their level of responsibility in relation to immigration and refugee processes?

- Does the onboarding training make clear what people can do based on the level or area of training successfully completed? Does the onboarding training Include clear guidance on the scope of services people are to provide and when and where to refer clients (internally or externally)?

- For staff, interns and volunteers not directly working on immigration and refugee processes, does the onboarding training include guidance on how to respond if service users have needs related to refugee and immigration processes (for example, how and where to refer them; advice on not improvising answers)

b. Successful completion of the training is required before services are delivered

- How do you assess whether trainees have fully completed the training and have understood the contents?

- What remedial processes do you have if the training is not successfully completed?

c. There is a mentorship process for those beginning to offer services

- Do you have a mentoring process for new staff, interns and volunteers? Do they spending time shadowing or observing more experienced workers as they provide services related to immigration and refugee processes?

- Does the mentorship include a period when the person seeks approval from the mentor before taking certain actions? (for example, before providing a client with certain information or finalizing an application)

- How long is the mentorship for? Does it vary depending on the types of responsibilities or the needs and abilities of the person being mentored?

2. Ongoing Training

a. Training is provided on a regular basis and as needed

- Is there regular training for all staff, interns and volunteers offering services related to immigration and refugee legal processes? How often is it offered (for example, every two weeks or every month)?

- Do you have a process for scheduling extra training when needed? (For example, when there is a change to refugee and immigration law or processes related to the services the organization offers, or if a complaint or feedback points to gaps in knowledge.)

b. **There is a clear and effective process for identifying training needs and opportunities**

- How are the training needs determined? (Input from staff? Are issues identified by managers? Feedback from clients? Board? Changes in government rules? Regular review/assessment?)

- How do you take advantage of training opportunities within the sector (government educational sessions, umbrella organizations' sessions, etc.)? What is the process for identifying sessions that are relevant and deciding who will attend on behalf of the organization? How do you ensure that information acquired at such sessions is shared with others within the organization?

3. **Training resources and approaches**

a. **There is clear responsibility for overseeing and implementing training**

- Who has overall responsibility for training on refugee and immigration legal issues? (A specific position or positions? Or a committee?)

- Is planning, organizing and/or delivering training part of the explicit responsibilities of one or more staff members?

b. **Training is well-organized and of a high standard**

- Do you use a learning management system (such as https://www.talentlms.com)? If not, how do you organize information about training plans and the content of training sessions?

- Are you able to call on internal and external subject matter experts to prepare, review and/or deliver training on refugee and immigration legal processes?

- Does your organization partner with other organizations to share training resources or opportunities?

- What is the format of the training? (Online, self-guided? In-person or virtual group or individual? Presentation, break out groups?) Does it vary depending on the topic?

- Does your training include a scenario-based approach or a review of cases? (To help workers navigate appropriate responses to clients' needs)

- Do you use a "train the trainer" approach where trained employees will later train other employees within the organization to transfer knowledge?

4. The organization provides adequate funding for training

- How is the training funded? Is there an overall budget for training related to refugee and immigration legal processes? Are staff allocated a budget for the purpose of training at the beginning of each year? (e.g. $500 per person) Is there a budget for training for interns and volunteers?

- Is the budget adequate?

5. Training is regularly reviewed

- Is there a process in place to regularly review the organization's training (onboarding and ongoing) to ensure it is relevant, accurate, engaging and effective?

- Is there an effective way for trainees and trainers to give feedback on the organization, content and format of the training? How is that feedback reviewed and acted upon?

B. Knowledge Sharing

1. Compiling and sharing relevant information

a. The organization has an effective system to compile and update relevant information

- What system does the organization use to store relevant information on immigration and refugee legal processes? Is it an in-house system such as a shared drive or internal wiki? Or do you use a learning management system such as https://www.talentlms.com?

- Who is responsible for the information system?

b. Relevant information is readily accessible to all who need it

- Is the system accessible to all staff, interns and volunteers who need it?

- Is it organized in a manner that allows people to readily find what they are looking for?

2. Sharing and updating information

a. The organization has effective strategies to keep up-to-date on relevant information

- Does the organization participate in CCR meetings, consultations and webinars, and review CCR member mailings, in order to keep up to date on changing information related to immigration and refugee legal processes?

- What local or regional (formal/informal) networks does your organization participate in where relevant information is exchanged?

- Does your organization have partnerships with other organizations with expertise (e.g. specialized NGOs, legal clinics)? Which ones and how do you use those relationships to keep up to date?

- Which relevant listservs or information newsletters is the organization subscribed to?

b. The organization has effective strategies to share relevant updated information to all within the organization who need to know?

- Do you use regular staff meetings to share updated information? If so, how do you pass on the information to relevant people that might not be at the meeting (e.g. staff who are absent, or relevant volunteers)?

- Are information updates shared through online systems, such as notifications on an information system or a Microsoft Teams Channel?

- Who is responsible for ensuring updates are shared?

- What is the process to ensure that people who have received relevant information updates (for example, because they attended an external training session) pass the information on to others?

- How do you ensure that all within the organization who need the information are included on the list of people receiving updates? (for example, all staff, interns and volunteers who work in a specific immigration process area receive notifications of updated information in that area)

c.   The information system is kept up-to-date

- Who is responsible for ensuring that relevant new information is added to the organization's information system? Is there a designated staff member? Is it a joint responsibility among several people?

- Is there a timeline for updating information, to ensure there is not a long delay?

- Is there a process to regularly review and update the information? How often? By whom?

- Is there a clear process for all relevant people to point out if they notice that information may be out of date or incorrect? Are they encouraged to do so?

- Do individuals or small teams within the organization develop and maintain expertise in certain areas? Is there a system to ensure that others within the organization know whom they can ask about specific areas? Do you have a process to ensure that there is always someone on staff with expertise in each relevant area?

- Does the organization have relationships with outside experts (e.g., lawyers) who can be contacted when questions arise about the latest information? What is the process for referring questions? How is the information shared once an answer is received?

- Does the organization collaborate with other organizations to regularly update the information?

3. Knowledge sharing processes are regularly reviewed

- Is there a process in place to regularly review the organization's processes for compiling, sharing and updating relevant information?

- Is there an effective way for all relevant people to give feedback on the processes for compiling, sharing and updating relevant information? How is that feedback reviewed and acted upon?