



Best Practices for Monitoring Resource Kit

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Best Practices for Monitoring

1. Introduction

Bringing refugees to a safe and peaceful country is one of the primary motivations of a Sponsorship Agreement Holder (SAH), yet the quality of settlement assistance offered to refugees upon their arrival in Canada is equally important. SAHs must draft a [Settlement Plan](#) as part of their sponsorship application, and implementation and follow-up should be included in this plan. If a sponsoring group does not have a mechanism for checking whether a [Settlement Plan](#) is realized, it can result in unmet settlement and financial needs and lead to a possible sponsorship breakdown and/or default.

Periodically monitoring the activities of its Constituent Groups (CGs) and co-sponsors post-arrival is a key responsibility of a SAH.

2. What is Monitoring?

The SAH's Sponsorship Agreement defines monitoring as: "Periodic follow-up to check the status and progress of a sponsorship and to verify that responsibilities are being fulfilled."¹

3. Who is Responsible for Monitoring?

According to the Sponsorship Agreement signed by Immigration, Refugees and Citizenship Canada (IRCC) and SAHs, both IRCC and SAHs are responsible for monitoring the quality of financial and settlement support being provided to the newcomer(s) in order to ensure that both the sponsor and the newcomer(s) are meeting their respective commitments and responsibilities.²

A SAH is expected to monitor the activities of its CGs and co-sponsors to ensure that they are fulfilling their sponsorship responsibilities and obligations, while IRCC is responsible for monitoring the SAH, its CGs and co-sponsors.

SAHs are also responsible for informing and working cooperatively with IRCC to resolve any post-arrival issues or problems that could lead to a sponsorship breakdown, regardless of whether the issue concerns the newcomer(s) or the SAH's CGs and co-sponsors.³

National SAHs that have offices across Canada must provide adequate oversight to their regional offices. The head office for the SAH must ensure that their regional offices, as well as any CGs, co-sponsors and newcomer(s) in the community of settlement, are aware of their responsibilities and what is expected of them. The national SAH must also ensure that they are

¹ See Appendix 4 of the Sponsorship Agreement at p.29.

² See Section 5(r) of the Sponsorship Agreement and Section 6(k) of the Agreement.

³ See Section 5(s) of the Sponsorship Agreement.

kept aware of any potential or emerging issues that arise pre-arrival and during the sponsorship period so that they are able to intervene if necessary.

3. Why is Monitoring Important?

There are many reasons for SAHs to monitor their CGs and co-sponsors during the sponsorship period. These reasons are related to the large number of financial and settlement responsibilities that sponsors agree to take on; the responsibilities of SAHs as outlined in the Sponsorship Agreement; and, ultimately, to ensure that the financial and settlement needs of the newcomer(s) are being met and that the successful settlement of the newcomer(s) in Canada is supported.

All parties that sign the [Sponsorship Undertaking – Sponsorship Agreement Holders \(SAH\) \[IMM 5373\]](#) form, i.e. SAHs, CGs and/or co-sponsors, are jointly liable to fulfill the obligations and responsibilities associated with refugee sponsorship, namely providing financial and settlement support to the newcomer(s) during the sponsorship period.⁴ However, the SAH retains ultimate legal responsibility and in situations where the CG or co-sponsor does not fulfill their obligations, the SAH will be held solely responsible.⁵ If a SAH is unaware that their CG and/or co-sponsor is not providing sufficient financial and/or settlement support to the newcomer(s), they may be held liable and this may have an impact on the SAH's ability to submit new applications and their Sponsorship Agreement.

SAHs are responsible for ensuring they have sufficient resources and expertise to fulfil their sponsorship responsibilities and must ensure that their CGs and co-sponsors have adequate resources and have made the appropriate arrangements to fulfill these responsibilities.⁶ Monitoring allows SAHs to ensure that their CGs and co-sponsors are fulfilling their sponsorship responsibilities and are providing adequate financial and settlement support to the newcomer(s). It also enables SAHs to provide timely support to their CGs, co-sponsors and the newcomer(s), and act in a timely manner to avoid sponsorship disputes and breakdowns. For example, if the SAH realizes that its CG and/or co-sponsor are not meeting their sponsorship responsibilities, it is expected to offer training, advice, information and support to help them do so.

Following this, if the CGs and/or co-sponsor are still not carrying out their duties, the SAH may take other action such as finding an alternative sponsoring group. Or if the newcomer(s) have moved out of the community of settlement, the SAH can ensure that the [residency requirements](#) are still being fulfilled.

Monitoring also allows SAHs to ensure, support and contribute to the successful settlement of the newcomer(s) they have sponsored in Canada and that the financial and settlement needs of

⁴ See Section 5(l) of the Sponsorship Agreement.

⁵ See Section 5(l) of the Sponsorship Agreement.

⁶ See Section 5(n) of the Sponsorship Agreement.

the newcomer(s) are being met. If a SAH is unaware that their CG and/or co-sponsor is not providing sufficient financial and/or settlement support to the newcomer(s), or there are issues or conflicts between parties, the needs of the newcomer(s) will not be met and this can lead to a sponsorship breakdown.

5. What Should SAHs Monitor?

SAHs should monitor whether their CGs and co-sponsors are meeting their sponsorship responsibilities by providing adequate financial, settlement, practical and emotional support to the newcomer(s) they have sponsored (as detailed in Appendix 1 of the SAH Agreement; Section F of the [Sponsorship Undertaking – Sponsorship Agreement Holders \(SAH\) \[IMM 5373\]](#) form; [Appendix A of the Instruction Guide for Sponsorship Agreement Holders \[IMM 5413\]](#); and, the [FAQs on Post-Arrival Financial Support for the PSR Program](#)).

The things that SAHs should monitor can include, but is not limited to:

- Whether the CG and/or co-sponsor has met with the newcomer(s) in person and how often they have met with them since arriving in Canada;
- Whether the newcomer(s) have adequate housing;
- Whether the newcomer(s) have received their Permanent Resident (PR) cards, and if not, what steps have been taken to follow up with IRCC;
- Whether the newcomer(s) have had a language assessment and are attending or have attended English or French language classes;
- Whether children under the age of 16 are enrolled in school, if applicable;
- Whether the newcomer(s) have applied for the Canada Child Tax Benefit (CTB), if applicable;
- Whether the newcomer(s) know and have access to public transit, if applicable, or other methods of transportation;
- Whether the newcomer(s) are aware of the Interim Federal Health Program (IFHP) and have a provincial health card;
- Whether the newcomer(s) have a family doctor, dentist and have been connected with any other medical services that are required, and whether they know how to contact emergency services (911);
- Whether the newcomer(s) have any physical or mental health needs that they still require treatment for;
- Whether the newcomer(s) have been connected with a settlement agency or other community-based services;
- Whether the newcomer(s) have access to an interpreter, if required;
- Whether the newcomer(s) have their own bank account, know how to use it and manage their own finances;
- Whether the newcomer(s) receive financial support from the CG and/or co-sponsor, including how much, how often and does this comply with what was agreed upon and detailed in the settlement plan;

- Whether the newcomer(s) brought any financial assets with them to Canada and how this was dealt with by the CG and/or co-sponsor;
- Whether the CG and/or co-sponsor charged the newcomer(s) any fees or requested money or donations from the newcomer(s) either pre or post-arrival; and,
- Whether the newcomer(s) are employed or self-employed and whether this is voluntary.

5. How Often Should Monitoring Take Place?

There are no set time frames on how often SAHs should monitor their CGs and/or co-sponsors. Depending on capacity, some SAHs may check-in with their CGs, co-sponsors and the newcomer(s) on a monthly basis. Other SAHs may have identified certain points in the sponsorship period where they will speak to their CGs, co-sponsors and the newcomer(s) they sponsored.

Successful monitoring is built on frequent contact and clear communication with CGs, co-sponsors and the newcomer(s). Good communication will result in strong relationships with all parties, including the newcomer(s), and clear expectations around what is expected from everyone involved with the sponsorship.

Good communication starts when CGs and potential co-sponsors first contact the SAH to see if they are able to submit an application. Before submitting an application to IRCC, SAHs should clearly explain to CGs and co-sponsors that they will be checking in throughout the sponsorship period with them and the newcomer(s) to ensure that everyone is fulfilling their obligations and responsibilities.

Based on common SAH practices, this page has checklists that can be downloaded and used pre-arrival, in the first few weeks following arrival, and at three, six and nine months after arrival, to monitor the activities of CGs, co-sponsors and newcomer(s). An evaluation form is also available to download and this can be used at the end of the sponsorship period in month twelve or after the sponsorship period ends.

6. Best Practices Used by SAHs

The Sponsorship Agreement does not state how SAHs should monitor their Constituent Groups (CGs) and co-sponsors. SAHs have the discretion to develop and implement their own monitoring procedures and practices. The diversity in size, composition and capacity of SAHs makes it difficult to develop a one-size-fits-all monitoring mechanism or procedure. However, certain activities that occur pre-arrival and during the sponsorship period with CGs, co-sponsors and the newcomer(s), such as orientation, training, the sharing of resources and good communication, can assist with setting up successful sponsorships.

The information in this section may help SAHs in developing their own monitoring procedures and practices.

Practices or Procedures Being Used by SAHs

A 2016 survey of SAH monitoring practices found the following steps were used by many SAHs:

- An initial orientation to refugee sponsorship for new, existing and prospective CGs and co-sponsors; screening potential CGs and co-sponsors; assigning and clarifying roles and responsibilities; the use of an internal Memorandum of Understanding (MoU), agreement or other type of contract that clearly outlines responsibilities and obligations; and, preparing the [Settlement Plan](#) with CGs and co-sponsors.
- Communication with CGs and co-sponsors throughout the application process; providing SAH or RSTP training to CGs and co-sponsors while the application is in process; sharing RSTP resources, such as [fact sheets](#) and [recorded webinars](#); and, sharing and distributing resources that the SAH may have developed internally.
- A pre-arrival check-in or meeting with the CG and/or co-sponsor, often when the Notification of Arrival Transmission (NAT) is issued, to review tasks, responsibilities and obligations.
- A post-arrival check-in with the CG and/or co-sponsor and the newcomer(s), often within the first two weeks after arrival, to ensure that the proper supports are in place.
- Check-in with the CG and/or co-sponsor and the newcomer(s) during the sponsorship period on an ad-hoc basis or at regular intervals.
- Three, six and nine month check-ins during the sponsorship period; and,
- An evaluation with the CG and/or co-sponsor and the newcomer(s) at or near the end of the sponsorship period, or a final report is prepared and submitted to the SAH by the CG and/or co-sponsor.

Useful Tools and Practices

SAHs have found the following tools and practices helpful when monitoring or checking-in with the CG and/or co-sponsor and the newcomer(s):

- Ensuring that all parties (CG and/or co-sponsor and the newcomer(s)) have a copy of the [Settlement Plan](#) that the SAH prepared with the CG and/or co-sponsor and submitted to IRCC or kept on file;
- Listing all persons or parties involved in the sponsorship on the [Sponsorship Undertaking – Sponsorship Agreement Holders \(SAH\) \[IMM 5373\]](#) form as a CG or a co-sponsor so they have a formal legal responsibility with IRCC and can be held liable;
- A signed internal agreement, MOU or contract with the CG and/or co-sponsor with each parties' responsibilities, obligations and expectations clearly outlined;
- A [database](#) that allows the SAH to track applications and store contact information for the CG, co-sponsor and the newcomer(s);

- An agreement that the parties will inform the SAH if there are any changes in contact information (such as residential address so that the SAH can ensure they are fulfilling the residency requirements); and,
- Distributing the contact information of the SAH to CGs, co-sponsors and newcomer(s) and encouraging them to contact the SAH with any issues or questions.

What Methods Work for SAHs?

SAHs have the same latitude in setting their own monitoring practices as they do with setting their criteria for recognizing and authorizing CGs and co-sponsors. SAHs can review the list of practices in this document and choose those that work best for them.

SAHs should decide on a process or list of steps that they will use with each group. Here are ones that many SAHs use already:

1. Reviewing the Settlement Plan: A SAH should revisit the [Settlement Plan](#) it completed and kept on file for the application with its CG and/or co-sponsor either shortly before or shortly after the expected arrival of the newcomer(s), preferably with the newcomer(s) full participation. This might be as soon as the application is approved by the Visa Office overseas; when the pre-Notice of Arrival Transmission (NAT) or the NAT is received; or, a few days before the newcomer(s) arrival in Canada.

Some refugees arrive in Canada several months or years after the sponsorship is submitted to IRCC. For this reason, the [Settlement Plan](#) should be reviewed so that the CG and/or co-sponsor is reminded of their responsibilities, obligations and commitments. In addition, there may have been changes in the composition of the SAH, CG and/or co-sponsor: the SAH may have a new representative; members of the CG or the co-sponsor may have moved to a different location; the CG and/or co-sponsor may no longer be available due to sickness or incapacitation and be unable to carry out their duties. Reviewing the [Settlement Plan](#) allows the SAH to address and respond to any of these changes, as well as revise the [Settlement Plan](#), to ensure that the newcomer(s) will receive adequate financial and settlement support on their arrival in Canada.

Reviewing and revising the [Settlement Plan](#) with the CG and/or co-sponsor and the newcomer(s) throughout the sponsorship period is also helpful, especially if unexpected issues arise that affect the enactment of the original plan. This may take place if the group identifies previously unknown settlement needs, or a conflict arises amongst the parties, or the CG and/or co-sponsor is not providing financial and settlement support to the required standards, and the SAH needs to find an alternative group.

IMPORTANT: All SAHs are required to complete a [Settlement Plan](#). If the SAH is less than two years old, the [Settlement Plan](#) must be submitted with the application package to ROC-O. If a SAH is more than two years old, the [Settlement Plan](#) does not need to be submitted to ROC-O, but it must be completed and kept on file as IRCC may request a copy of this form at any time.

2. Good Communication: Good communication and an open-door policy on the part of the SAH towards its CGs, co-sponsors and the newcomer(s) will foster successful settlement and the smooth execution of the [Settlement Plan](#). CGs, co-sponsors and newcomers should be encouraged to contact the SAH with any issues or questions. A collegial working relationship with CGs, co-sponsors and the newcomers throughout the sponsorship period will allow the SAH to act in a timely way to ensure the best settlement outcomes for the resettled newcomer(s) and to ensure that the CG and/or co-sponsor is fulfilling its financial and settlement responsibilities. For national SAHs, good communication with regional offices, CGs, co-sponsors and the newcomer(s) in the community of settlement is particularly important as it enables the SAH to respond to any issues that arise and intervene if necessary.

3. Home Visits: Some SAHs have found it useful to visit the newcomer(s) to observe their living conditions. The visit could happen at the early stages of the sponsorship period, or once the newcomer(s) are housed in permanent accommodation. A visit allows the SAH to see whether the accommodation is appropriate for the newcomer(s) family's size and the needs of children, young women and the elderly in the family; whether the furniture and utensils are suitable; and, whether the housing is safe and fit to live in during both cold and hot seasons. Visiting more than once, without being intrusive, may be a good way for SAHs to ensure that the CG and/or cosponsors are fulfilling their responsibilities and to find out if the newcomer(s) has any concerns. Home visits should be scheduled respectfully and with the permission of the newcomer(s).

4. Surveys: Some SAHs have developed surveys to gather information about the settlement experiences of newcomer(s) and the CG and/or cosponsors. One SAH distributes two surveys: one that is filled out by the newcomer(s) during the initial stages of the sponsorship, and another that all parties complete at the end of the sponsorship. This gives the SAH an idea of how the CG and/or co-sponsor have met or tried to meet the needs of the newcomer(s) and honour their responsibilities, obligations and commitments. Note: Surveys should be used in combination with one or more of the other listed methods to ensure that the SAH is kept aware of any potential or emerging issues that arise during the sponsorship period and is able to intervene if necessary.

5. Monthly Reporting: Some SAHs require the CG and/or co-sponsors to provide a monthly report using a template that the SAH has created. The questions in the reporting template deal with different aspects of the sponsorship and cover the relationship between the CG and/or co-sponsor and the newcomer(s) as well as the supports being provided and the internal processes used to ensure that the newcomer(s) needs are being met.

6. Individual Intervention: A SAH has the right and an obligation to intervene and take corrective action to avoid situations, misunderstandings or disagreements which could have an impact on newcomer(s), the sponsorship or the SAH's Sponsorship Agreement. These misunderstandings or disagreements might happen if the CG or co-sponsor are unable or unwilling to fulfill their responsibilities and obligations due to conflict or other reasons. In the

case of a conflict or a dispute, SAHs should find a way to help resolve the conflict. If, despite the best efforts of a SAH, the CG and/or co-sponsors cannot continue providing financial and settlement support to the newcomer(s), the SAH may need to look for another CG and/or co-sponsors to assume the responsibilities of the sponsorship. The SAH also has the option of assuming the sponsorship responsibilities without the assistance of the CG and/or co-sponsor. If the SAH cannot resolve a conflict, it can [contact IRCC for guidance](#).

Just as every SAH and its CGs and co-sponsors are different and every sponsorship is unique, there is no single way to monitor sponsorships. The above-mentioned practices, and others, can help sponsors determine whether the sponsorship commitments are being met on schedule and if the settlement experience is meeting the refugees' needs.

SAHs may also choose to use the best practices checklists available for download on this page to monitor and check-in with their CG and/or co-sponsors and the newcomer(s).

7. Monitoring by IRCC

As noted in the SAH's Sponsorship Agreement, both IRCC and SAHs are responsible for monitoring the quality of financial and settlement support being provided to the newcomer(s) in order to ensure that both the sponsor and the newcomer(s) are meeting their respective commitments and responsibilities.⁷

IRCC's [Resettlement Services Assurance Team \(RSAT\)](#) conducts post-arrival assurance activities to ensure that the newcomer(s) are receiving the support they should be from the SAH and the CG and/or co-sponsor.

Information about the activities and procedures used by RSAT can be found [here](#).

For information on who to contact at IRCC at each stage of the sponsorship process can be found [here](#).

⁷ See Section 5(r) of the Sponsorship Agreement and Section 6(k) of the Agreement.

Initial Meeting Checklist

An initial meeting with potential and existing Constituent Groups (CGs) and co-sponsors is required by many SAHs. If handled well, this can help CGs and co-sponsors set reasonable expectations regarding the sponsorship and ensure that potential sponsors understand what their responsibilities and obligations are. Here are some of the ways SAHs can handle their first contact with a new group:

- An in-person **assessment interview** to examine the financial and settlement capacity of the co-sponsors;
- The SAH representative **meets with one or more key members of the group** to give an overview of what to expect during the sponsorship; or,
- The SAH holds **information and training workshops** for all potential CGs and co-sponsors, as well as existing CGs and co-sponsors.

Below are some of the items that SAHs have found useful to review with prospective CGs or co-sponsors when they first enquire about sponsoring:

- The requirements of the PSR and/or the BVOR programs and the application process.
- Helpful resources/training, such as those available from the SAH and RSTP.
- The cost of sponsorship and sponsors' financial and settlement responsibilities.
- An introduction to the [RAP rates](#), RAP polices (as outlined in the [FAQs on Post-Arrival Financial Support for the PSR Program](#)) and how they affect sponsorship costs.
- The requirements of sponsors and their volunteers regarding criminality checks and screenings etc.
- The role and names of local settlement agencies (English and French language).
- The importance of connecting with a local settlement agency and settlement workers.
- The SAH's expectations about participation in training.
- A review of the internal contract or Memorandum of Understanding (MOU) that the SAH uses and the group will be expected to sign (if any).
- Expectations and timelines regarding monitoring, checking in and reporting.
- SAH's expectations regarding communication.
- SAH and CG/co-sponsor responsibilities prior to the arrival of the refugee(s).
- SAH and CG/co-sponsor duties and responsibilities post-arrival.
- The importance of the Settlement Plan.
- What help the SAH can provide pre- and post-arrival.

Training

Most SAHs recommend that their CGs/co-sponsors take training, regardless of whether they are new to refugee sponsorship or experienced sponsors. Some SAHs require their CGs/co-sponsors to be familiar with the items listed below before the SAH will assist them with their application. A wide variety of resources are available for CGs and their volunteers, and also new groups, on what sponsorship is and what the responsibilities and obligations are when sponsoring refugees from overseas.

Training may consist of in-person or webinar sessions that the SAH itself conducts or that RSTP provides. Many recordings of past webinars are available on the RSTP website at the following link: <http://www.rstp.ca/en/resources/video/past-webinars/>

Some SAHs produce their own fact sheets, FAQs and information resources, as does the SAH Association. RSTP also has [fact sheets](#) (translated into a variety of languages), [videos](#), [recorded webinars](#) and a [Sponsorship Handbook](#) available online under the 'Resources' tab at: www.rstp.ca

After training, SAHs can assess whether the CG and/or the co-sponsors are familiar with the following:

- The rights of refugees.
- Sponsorship costs, RAP rates, RAP polices and the financial requirements.
- The CG's settlement responsibilities on arrival.
- The CG's responsibilities and obligations duties throughout the sponsorship period.
- The sponsorship process and certain markers in the application process, e.g. when the NAT might be received etc.

Support and Resources

Many SAHs encourage new CGs and co-sponsors to reach out and find support through existing CGs and co-sponsors.

Your SAH may want to consider holding a meeting for new and experienced CGs and co-sponsors so they can share their experiences about the process, best practices and manage the expectations of sponsors new to refugee sponsorship. You may also want to consider hosting meetings or trainings with local SAHs to contribute to this networking, sharing of experiences and best practices. Or perhaps you can link a new group with an experienced group for mentoring.

Some SAHs support their groups with regular updates on sponsorship. This will ensure that the sponsoring groups are well-prepared for sponsorship, which in turn makes monitoring less onerous for all.

Social media channels like Twitter and Facebook are also easy to set up and a great way to get information out to CGs and co-sponsors. Many SAHs announce new arrivals, fundraising efforts and new sponsorship groups to their community this way. If your SAH is using social media, please ensure that you protect the refugee(s)' privacy and do not identify refugee(s) by name, share their story or pictures of them without their consent as doing so may have implications for the friends and family members of the refugee(s) that are not in Canada (i.e. they may still be in the country of origin and targeted for persecution).

RSTP sends out a biweekly [RSTP Bulletin](#) that contains the latest policy and program updates and posts the details of upcoming [webinars](#) and [training sessions](#) on its [website](#), through its social media channels and list-servs.

Pre-Arrival Checklist

Many SAHs check-in with the Constituent Group (CG) and/or co-sponsors in the weeks just before the newcomer(s) arrive and it is recommended that all SAHs do so in order to ensure that the CG and/or co-sponsors are ready for the arrival of the newcomer(s). Often this is linked to when the SAH, CG and/or co-sponsors receives a Notice of Arrival Transmission (NAT) or pre-NAT, i.e. the notification of when the newcomer(s) will be arriving.

This check-in is a good time to address any remaining questions, concerns or issues the CG and/or co-sponsors might have, and also a good time to reassure and encourage them to approach the SAH if there are any issues during the sponsorship period. It is also the ideal moment to ensure they have reviewed the [RSTP Sponsorship Handbook](#), other resources produced by the SAH and RSTP, and provide them with the other checklists in this resource kit.

The SAH should review the [Settlement Plan](#) with the CG and/or co-sponsors at this time to remind everyone of their responsibilities, commitments and obligations and to make sure that the original commitments are still feasible. This review allows members of the sponsoring group to refresh and renew their legal commitment to honour the original responsibilities; to update the Settlement Plan, if necessary; and, to review and remind themselves of any changes that may have occurred since its original preparation and submission to IRCC, such as a new spouse or child that was added post-submission.

Here are the items SAHs have found useful to check at this point:

- The Settlement Plan and any changes that have occurred with the CG and/or co-sponsors.
- Details of the arrival contained within the pre-NAT and NAT.
- Whether temporary or permanent housing has been set up and is available on or before the date of arrival.
- Who will be at the airport to meet the newcomer(s).
- Whether an interpreter is required and have the CG and/or co-sponsors made the arrangements for an interpreter to be present when the newcomer(s) arrive.
- A review of what documents the newcomer(s) may be issued at the airport, e.g. Confirmation of Permanent Residence (COPR) document, Interim Federal Health Program (IFHP) certificate, Social Insurance Number (SIN) etc.
- Whether the CG and/or co-sponsors are aware of reception and information services available at the airport, what services they provide, where they are located at the airport, how to contact them (in the event that there are any issues or delays on arrival, e.g. receiving documents or exiting customs, so the CG and/or co-sponsors can call to confirm) and how the newcomer(s) can access their services.
- How the newcomer(s) might be feeling when they first arrive in Canada and any immediate health issues or concerns that need to be addresses as soon as possible after arrival.

- What the CG and/or co-sponsors plan is for the newcomer(s) immediately after they arrive in Canada and have been welcomed at the airport, i.e. where will the newcomer(s) be going immediately after arrival in Canada.
- A reminder for the CG and/or co-sponsors to provide the newcomer(s) with information on how to call emergency services in the event of an emergency and how to contact the SAH, CG and/or co-sponsors if there are any sponsorship related issues.
- The tasks for the first two weeks after arrival.
- The priorities of those tasks and who is responsible for each task.
- Whether the group has a list of local settlement agencies (either French or English language, depending on the language of the newcomers) that the newcomer(s) can access and will be connected with.

Airport Arrival – Who Should Go?

Some SAHs will send a representative to assist the group with welcoming the newcomer(s) at the airport, but usually it is the CG and/or co-sponsor who organizes this.

Week 2 Checklist

Many SAHs check in about the settlement of the sponsored individual(s) two weeks after they have arrived in Canada. There are various ways that SAHs do this:

- Offer a mandatory in-person arrival orientation session using an interpreter with both the newcomer(s) and the Constituent Group (CG) and/or co-sponsors, followed by an orientation with an interpreter for just the newcomer(s).
- One SAH offers an orientation session for the CG and/or co-sponsors and newcomer(s) on the rights and responsibilities of each party.
- Another SAH offers a community circle to all newcomer(s). A community circle is a safe discussion space that encourages openness, empowerment and the opportunity to express differing thoughts and opinions in a safe, non-judgmental place.
- Some SAHs visit the newcomer(s) at their home to see how things are going and to find out if there are any issues or concerns.
- Check-in by phone or e-mail with the CG and/or co-sponsors and the newcomer(s).

If at all possible, it is best to meet in-person with both the CG and/or co-sponsors and the newcomer(s) during these first few weeks. If this is not possible, each SAH may wish to explore what options they have for obtaining meaningful feedback from the newcomer(s) directly as well as from their CG and/or co-sponsors. It is important for the SAH to communicate directly with the newcomer(s) and to ensure that the newcomer(s) feel comfortable contacting them. Doing so enables the SAH to receive first-hand information and feedback from the newcomer(s) about the sponsorship.

Some SAHs use a survey or a standard questionnaire to get feedback from the newcomer(s) directly. If your SAH chooses this option, please ensure that the survey or questionnaire is accessible in the newcomer(s)' language. The responses to the survey or questionnaire should be recorded and filed with the [Settlement Plan](#) and any other documents the SAH has on file for the application. This is also a good time to discuss with the newcomer(s) any questions, issues or concerns they have with the sponsorship and ensure that the CG and/or co-sponsors have connected or referred the newcomer(s) to a settlement agency so they can discuss with a settlement worker any questions they have about living in Canada.

The questions that could be asked of the newcomer(s) towards the end of their first or second week include those in the checklist below; they can be used in designing your survey or questionnaire.

For the Newcomer(s)

Arrival and Communication

- Were the newcomer(s) met at the airport?

- Have the newcomer(s) been able to reach any family overseas?
- Are there any family or close friends in Canada?
- Do newcomer(s) have a cell phone and know how to contact the SAH, CG and/or co-sponsors?
- Do the newcomer(s) need interpretation support?
- Do the newcomer(s) have any urgent physical or mental health issues that need to be addressed immediately?

Housing and Clothing

- Do the newcomer(s) have adequate temporary or permanent housing?
- If the newcomer(s) are in temporary housing, is there a clear and realistic plan to transition them to permanent housing?
- Do the newcomer(s) have adequate clothing (including winter clothing), food, linens, kitchen equipment and furniture?

Documents and Applications

- Were the newcomer(s) issued a Social Insurance Number (SIN) on arrival at the airport in Canada and have the newcomer(s) made an application for one if they were not?
- Do the newcomer(s) know of or have they applied for the Canada Child Benefit (CCB)?
- Do the newcomer(s) know how to or have they opened a bank account?
- Do the newcomer(s) need to submit an application under the One-Year Window of Opportunity Provisions to bring any family members that were listed as non-accompanying on the application forms to Canada and is the newcomer(s) aware that this application must be submitted within one year of their arrival in Canada?
- Do the newcomer(s) need help with any other applications or documents?

Education

- Have all school age children been registered at a school?
- Are the newcomer(s) enrolled in English or French classes, has the CG and/or co-sponsor made plans to do so if they are not and do the newcomer(s) know how to do this themselves?
- Are the newcomer(s) aware that they have the choice to study (full-time or part-time) or do employment training programs rather than work during the sponsorship period?

Sponsorship

- Do the newcomer(s) have any questions regarding the sponsors' (SAH, CG and/or co-sponsors) role and their relationship with them?
- What are those questions?

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- Do the newcomer(s) know how to contact the SAH, CG and/or co-sponsors when they have questions?
 - Do the newcomer(s) feel comfortable contacting the SAH, CG and/or co-sponsors with questions?
 - Are the newcomer(s) aware of the length of the sponsorship period?
 - Are the newcomer(s) aware of their rights and responsibilities under PSR or BVOR programs?

Transportation

- Do the newcomer(s) have access to transportation?
- Have all newcomers 18 years of age or older being provided with monthly public transportation passes, or in areas with no public transit system, do they have access to alternative transportation?
- Do the newcomer(s) know how to use public transit, if available?
- Do the newcomer(s) know of the requirements for a driver's license?

Budgeting and Finance

- Have the CG and/or co-sponsors talked about budgeting with the newcomer(s)?
- Do the newcomer(s) have their own bank account?
- Do the newcomer(s) know how much money they will receive each month, when and from whom?
- Do the newcomer(s) know where to find food that they are familiar with at reasonable prices?
- Do the newcomer(s) know where to find clothing and household goods at reasonable prices?
- Are the newcomer(s) aware they'll have to repay their travel loan?
- Are the newcomer(s) aware that they can apply any funds that exceed the [personal asset exemption limit](#) against the balance of their loan before financial support is deducted?

Employment/Self-Employment

- Are the newcomer(s) aware that they are not expected to work or start looking for employment or self-employment during the sponsorship period, but, are encouraged to do so if they would like to and it is appropriate, i.e. it is not interfering with settlement

tasks, such as language training, or out of necessity due to not receiving financial support equivalent to the RAP rates?

- Are the newcomer(s) aware of a settlement agencies and resources in the local area that can help them prepare for employment or self-employment?

Health

- Do the newcomer(s) understand the benefits they will receive through the Interim Federal Health Program (IFHP)?
- Do the newcomer(s) know their basic coverage under the IFHP will end after 3 months once provincial healthcare coverage starts, and all IFHP coverage (including prescription drugs, vision, and emergency dental care) will end after the sponsorship period?
- Have the newcomer(s) signed up for provincial healthcare coverage?
- Have the newcomer(s) registered with local health professionals, i.e. family doctor, dentist and any other required medical services?
- Do the newcomer(s) have relevant information on vaccinations?
- Do the newcomer(s) require dental care?
- Do the newcomer(s) know how to contact emergency services if needed?
- Do the newcomer(s) know that counselling and mental health support is available and covered under IFHP for the duration of the sponsorship period?
- Do the newcomer(s) need assistance getting to appointments and, if so, do they know who will be helping them?

General

- How are the newcomer(s) doing and adjusting overall?
- What else might the newcomer(s) need?
- Is there anything the newcomer(s) would like to know?
- Has the newcomer(s) been connected or referred to a settlement agency?

Questions for the CG and/or Co-Sponsors

- Are there any concerns that the CG and/or co-sponsors have regarding the sponsorship?
- Are there any concerns that the CG and/or co-sponsors have regarding the newcomer(s)?
- Are there any concerns that the CG and/or co-sponsors have regarding another member of the group or another party to the sponsorship?
- Is everyone still following the Settlement Plan?
- Does the Settlement Plan need to be adjusted? If so, how?

Month 3 Checklist

Many SAHs check-in with both the newcomer(s) and the Constituent Group (CG) and/or co-sponsors three months after the newcomers have arrived in Canada. This can be done by phone, e-mail or in-person.

SAHs are recommended to check-in monthly throughout the sponsorship period. Alternatively, SAHs can check-in monthly up to the three month mark and then every three months thereafter. If your SAH decides to check in at the three month mark, the following are some of the questions that may be useful for the newcomer(s) and the Constituent Group (CG) and/or co-sponsors.

For the Newcomer(s)

Housing, Food and Finances

- Do the newcomer(s) have [adequate permanent housing](#) at this time?
- Do the newcomer(s) have adequate clothing, food, linens, household goods and furniture?
- Are the newcomer(s) receiving their monthly income regularly?
- Are the newcomer(s) now receiving the Canada Child Benefit (CCB)?
- Do the newcomer(s) know where to find foods they are familiar with at reasonable prices?
- Are the newcomer(s) using their bank account to pay for rent, groceries and other expenses?
- How is the newcomer(s) budget working for them? Do they have any questions about the budget?

Documents

- Have the newcomer(s) received their Social Insurance Number (SIN)?
- Have the newcomer(s) received their Permanent Resident (PR) cards?

Education

- Have the newcomer(s) registered all school age children for school and themselves for English or French language classes?
- How are the newcomer(s) settling in classes (school and language classes)?

Transportation

- Do the newcomer(s) know how to get around their town or city?

- If public transit is available in the town or city, do the newcomer(s) have monthly transit passes or do they know how to purchase transit passes?
- Have adequate transportation arrangements been made for the newcomer(s) if public transit is not available in the town or city?
- Do the newcomer(s) have the necessary information on how to get a driver's license, if needed?

Health

- Do the newcomer(s) have their provincial health cards?
- Have the newcomer(s) visited the necessary medical professionals, i.e. family doctor, dentist etc.?
- Do the newcomer(s) need counselling or any other mental health support?
- Have the newcomer(s) received the appropriate referrals or been given relevant information on how to access counselling or other mental health services?

Other Supports

- Have the newcomer(s) been in touch with their local settlement service providers or a settlement agency?
- Have the newcomer(s) expressed interest in attending/being involved in religious, ethno-cultural or community organizations?
- Do the newcomer(s) know how to contact the SAH, CG and/or co-sponsors when they have questions?
- Do the newcomer(s) feel comfortable contacting the SAH, CG and/or co-sponsors with questions?
- Have the newcomer(s) received assistance and support from the SAH, CG and/or co-sponsors when they need it?
- Do the newcomer(s) feel supported emotionally and morally by the SAH, CG and/or co-sponsors?
- Do all parties involved in the sponsorship, i.e. the SAH, CG and/or co-sponsors and the newcomer/s, feel like they can raise any concerns they may have with the another party?
- Are there any issues that the CG and/or co-sponsors and the newcomer(s) would like to talk about with the SAH?

Questions for the CG and/or Co-Sponsors

- How is the CG and/or co-sponsors finding the sponsorship?
- Are there any issues in the sponsorship that the CG and/or co-sponsors would like to talk about with the SAH?

Month 6 Checklist

SAHs should check-in at month six by phone or e-mail, although an in-person meeting is preferable, especially if you did not hear from the Constituent Group (CG) and/or co-sponsors and/or the newcomer(s) at month three, or there were concerns or issues raised by the CG and/or co-sponsors or the newcomer(s).

For the Newcomer(s)

Housing and Finances

- How is the housing and living situation for the newcomer(s)?
- Are the newcomer(s) aware of their rights and responsibilities as tenants?
- Do the newcomer(s) know when and how to pay their rent and any other household bills (utilities, hydro, phone, internet, cable, etc.)?
- Do the newcomer(s) need any help with budgeting?
- Are the newcomer(s) aware of the repayment plan for their travel loan?

Transportation, Mobility and Community

- Are the newcomer(s) able to get to where they need to go?
- Have the newcomer(s) made any connections with persons outside of the sponsorship group?
- Do the newcomer(s) require more support to make connections with persons outside the sponsorship group, or to find or get to community activities or events?
- Do the newcomer(s) need help connecting to specific programs or groups in the community related to their interests?

Documents and Applications

- Do the newcomer(s) have all the documents they require, e.g. Social Insurance Number (SIN); Permanent Resident (PR) card etc.?
- If applicable, have the newcomer(s) submitted an application under the One-Year Window of Opportunity Provisions to bring any family members that were listed as non-accompanying on the application forms to Canada? If so, what is the status of the application?
- Do the newcomer(s) need the assistance of the SAH, CG and/or co-sponsors with the application process for any remaining documents?

Relationships and Supports

- How is their relationship between the SAH, CG and/or co-sponsors and the newcomer(s)?

- Have the newcomer(s) checked-in with a settlement agency or met with a settlement worker?

Education and Development

- How are newcomer(s) English or French language classes progressing?
- How are the children of school age progressing at school?
- If the newcomer(s) have children that are younger than 12 years of age, have they been able to access occasional childcare or afterschool activities?
- Do the newcomer(s) wish to pursue further educational studies in future, e.g. bridging programs, secondary education, vocational courses, university degrees etc., and do they have access to resources and information on how they can pursue this?
- Are the newcomer(s) aware of the vocational classes, courses and diplomas that are available to them?
- Are the newcomer(s) interested in volunteering to improve their English or French language skills and to gain Canadian work experience, and do they have access to resources and information on how they can pursue this?

Other Needs

- Are there any other needs the newcomer(s) have?
- If yes, what are the needs and how does the SAH, CG and/or co-sponsors plan to address these?

Questions for the CG and/or Co-Sponsors

- How is the SAH, CG and/or co-sponsors relationship with the newcomer(s)?
- How are relationships between the SAH, CG and/or co-sponsors?
- Are there any issues in the sponsorship that the CG and/or co-sponsors would like to talk about with the SAH?
- Does the Settlement Plan need to be adjusted? If so, how?

Month 9 Checklist

Month nine is a crucial moment in the life of a sponsorship as all parties will need to be thinking of how to prepare for the end of the sponsorship period and the transition to Month 13.

SAHs should try to have in-person meetings with the Constituent Group (CG) and/or co-sponsors and/or the newcomer(s) to begin planning for the transition.

The CG and/or co-sponsors will need to think about whether the newcomer(s) have any unmet needs or service gaps that need to be addressed before the sponsorship period comes to an end, as well as what their relationship with the newcomer(s) will be like once the sponsorship comes to an end.

The newcomer(s) will need to think about employment/self-employment, social assistance, continued language classes and other educational courses and what they want the relationship with the SAH, CG and/or co-sponsors to be like once the sponsorship comes to an end.

The Month 13 – Planning Resource Kit

- Ensure that the CG and/or co-sponsors discuss the end of the sponsorship period and Month 13 with the newcomer(s) and about the need to plan for the transition.
- Ensure that the CG and/or co-sponsors have been provided with the [Month 13 – Planning Resource Kit](#) and that they and the newcomer(s) use it together to see if there is anything that needs to be done before the sponsorship period comes to an end.
- Ensure that the CG and/or co-sponsors collaborate with the newcomer(s) to make and discuss the transition plan.
- Use the checklists in the [Month 13 – Planning Resource Kit](#) to check-in with the CG and/or co-sponsors and newcomer(s).

If your SAH has used the checklists provided in this resource kit for Months 3 and 6, you'll find that some questions in the checklists of the [Month 13 – Planning Resource Kit](#) may already have been covered.

For the Newcomer(s)

Documents and Applications

- Do the newcomer(s) have all the documents they require, e.g. Social Insurance Number (SIN); Permanent Resident (PR) card etc.?
- If applicable, what is the status of the One-Year Window of Opportunity Provisions application to bring any family members that were listed as non-accompanying on the application forms to Canada?

- Do the newcomer(s) need the assistance of the SAH, CG and/or co-sponsors with the application process for any remaining documents?
- Do the newcomer(s) have information on when they are eligible to apply for citizenship and how to apply?

Other Needs

- Are there any other needs the newcomer(s) have?
- If yes, what are the needs and how does the SAH, CG and/or co-sponsors plan to address these before the end of the sponsorship period?

Questions for the CG and/or Co-Sponsors

- How is the SAH, CG and/or co-sponsors relationship with the newcomer(s)?
- How are relationships between the SAH, CG and/or co-sponsors?
- Are there any issues in the sponsorship that the CG and/or co-sponsors would like to talk about with the SAH?
- Does the Settlement Plan need to be adjusted? If so, how?

- Does the CG and/or co-sponsors need any help from the SAH?
- Do the CG and/or co-sponsors need any support, resources or training from the SAH or RSTP?
- Do the CG and/or co-sponsors know how to access further training and support if they need it?

Issues for Follow-Up

- Issues identified for follow-up at last check-in resolved?
- Any issues identified for follow up at next check-in?

Month 13 Evaluations

It is important for the SAH to receive feedback from the Constituent Group (CG) and/or co-sponsors and the newcomer(s) on how the sponsorship went.

Some SAHs have a final in-person meeting with the newcomer(s). Other SAHs conduct a survey over the phone or by e-mail with the newcomer(s). SAHs should distribute an evaluation to the CG and/or co-sponsors or require a final report from them after the sponsorship period is over.

SAHs can ask their CGs and/or co-sponsors to use the evaluation in the [Month 13 – Planning Resource Kit](#) to review and reflect on the sponsorship, or use their own (internal) evaluation and questionnaire tools.

When meeting or speaking with the newcomer(s), the SAH may want to discuss the following:

Settlement Support

- Are the newcomer(s) connected to a settlement service provider?
- Are the newcomer(s) satisfied with this service provider?

Finances and Employment

- Are the newcomer(s) employed or self-employed?
- If the newcomer(s) are employed, do they know about workplace rights and safety?
- Have the newcomer(s) applied for provincial social assistance (if necessary)?
- Does the newcomer(s) understand the details of provincial social assistance, such as:
 - How to apply;
 - How much money will be provided and when;
 - The terms and conditions; and,
 - The reporting requirements.
- Are the newcomer(s) comfortable managing their finances?
- Does the newcomer(s) know how to transfer money electronically, pay for their rent, household bills and other expenses?

Education and Training

- Are the newcomer(s) aware of the various vocational programs and academic courses they are able to access?
- If the newcomer(s) wish to pursue further studies, do they have the relevant information on courses and institutions?
- Do the newcomer(s) know how to arrange for childcare?

Housing

- Do the newcomer(s) have adequate housing?
- Are the newcomer(s) aware of subsidized housing options?
- Are the newcomer(s) aware of their rights and responsibilities as tenants?

Sponsorship Process and Period

- Is there anything they would like to say about the sponsorship process?

- Do they have any feedback about the SAH, CG and/or co-sponsors?
