



**Migration and
Refugee Services**

Renewing Hope. Seeking Justice.

UNITED STATES CONFERENCE OF CATHOLIC BISHOPS



Changes to the Cooperative Agreement

October 29, 2024



Housekeeping

Interact with presenters & attendees by:

Typing into the chat box

Asking questions in the Q&A

Raising your hand

The Zoom toolbar is at the bottom of your screen!

RESETTLEMENT SERVICES CONTACTS

FY2025 TEAM-AT-A-GLANCE



Resettlement Directors



Reception and Placement (R&P)



Match Grant



Preferred Communities & Supplemental Programs



Volunteer Engagement and Community Sponsorship



E-Learning Courses



Communications



Translated Resources Library



Resources

Webinar Recording on MRSCConnect

All webinars for the fiscal year are saved on the Communications tile.

Today's webinar will also be saved on the Reception & Placement page.

Introduction

Gaby Scott will be our facilitator today.

Gaby



R&P Field Support Coordinator

Learning Objectives

By the end of this session, you will be able to:

1

List key changes to the R&P Cooperative Agreement (CA)

2

Discuss how CA changes impact case management, performance outcomes, and program administration

3

Describe USCCB and PRM's timeline for implementing CA changes

R&P Service Models

*Different ways to serve
your clients*

Traditional/Standard R&P

Service-Based

Agency staff provide ***all*** required services and ***might*** receive assistance from volunteers, donors, and/or the U.S. tie to meet the case's needs

Cash-Based R&P

Direct Assistance Focus

Clients receive the full direct assistance amount up-front and agency staff provide ***few or no*** services or material needs support. **Not all R&P clients are eligible.**

Virtual R&P

Virtual Service

US Ties provide housing and additional support upon arrival. Cases receive virtual case management through their RA

R&P Service Models

*Different ways to serve
your clients*

Co-Sponsorship Team

Majority of Services

A community group provides the **majority or all** R&P services in partnership with your staff. Certain services cannot be delegated to co-sponsors

Support Team

Minority of Services

A community group provides **less than a majority** of R&P services in partnership with your staff. Certain services cannot be delegated to support teams

Cooperative Agreement Changes

23
Total
changes

Theme of the Change

Text directly from the
Cooperative Agreement

*Affiliate actions will be
bolded in red if needed*

Increased per-capita (direct assistance – \$1650/arrival) went into effect **10/1/2024**

- USCCB/MRS will monitor for the higher per-capita for **all arrivals on/after 10/1/2024**

USCCB/MRS will monitor for **all other FY25 changes** beginning with **arrivals on/after 12/1/2024**

USCCB/MRS Updates

- Since the FY25 R&P Cooperative Agreement does not specify that service plans are required for attached refugee minors (codes M2, M3, M5, M6, M7), USCCB/MRS has removed this requirement – **in FY25, service plans are required for all adult case members**
- USCCB/MRS is working to clean up MRSCoconnect and make sure all R&P resources are up-to-date
- While new/revised R&P case file forms are linked in this presentation, and were sent out in today's Resettlement Connection, more updated resources are coming soon in Resettlement Connection (e.g., the R&P Program Operations Manual)

Categories of Changes

Service Provision

Affiliate Finances

Quarterly
Consultations

HQ/USCCB
Changes

Administrative/
PRM Changes

Cash-Based R&P

Admin Changes

For your awareness, not your action!

For HQ/ USCCB

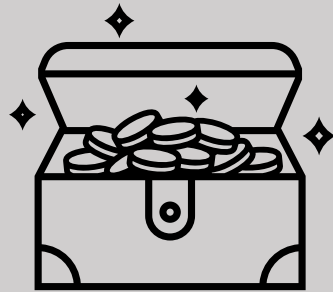
- For both ERMA and MRA quarterly performance reports, RAs will be required to distinguish between the number of clients, broken out by refugee and SIVs, served under the MRA and the ERMA awards. **For monitoring reports**, in addition to including findings and recommendations **RAs must notate the number of clients served under each award whose case file was reviewed or who received a home visit** as part of each reported monitoring.
- **RA monitoring reports must now include evidence that the affiliate's flex fund policy** include clear criteria to determine which cases will receive additional funds, how funds will be allocated, and how disbursement will be tracked and managed.

For Administrative/PRM

- For monitoring purposes, PRM may now **request both evidence of assessment for cases resettled through Cash-Based R&P Services and affiliate policies** on Cash-Based R&P Services.
- Revised the **definition of “community sponsorship”** to better incorporate individualized volunteer support.
- Incorporated throughout all Cooperative Agreements **“remote placement community partners”** alongside **“affiliates”** and **“co-sponsors,”** when relevant, and for RAs who resettle through remote placement, **removed redundancies** from the Remote Placement section of the Cooperative Agreement.

Flash Poll!

Does your office plan to utilize the full
\$400 in flex funds in FY25?



Affiliate Finances

for your awareness AND action

Per Capita Increase

Increased R&P Per Capita Direct Assistance from \$1325 to \$1650 and Affiliate Capacity Per Capita from \$1100 to [for USCCB - \$1,250 - \$1,450*]

For all arrivals starting Oct. 1!

No ADA

Removed language regarding Additional Direct Assistance (ADA)

**See [10.1.24 Resettlement Connection](#) & your funding award letter for more information on USCCB/MRS' FY25 tiered, cost-of-living-based admin funding*

Affiliate Finances

for your awareness AND action

Flex Fund Increase

Increased the flexible funding portion of the direct assistance per capita from \$200 to \$400. The new minimum direct assistance is \$1250.

From \$200 per arrival to \$400

Flex Fund Policy Collection

Strengthened requirements for affiliate flex fund policies and created a requirement that RAs must create standards for reviewing flex fund policies and that those standards must be approved by PRM. RAs must review and approve affiliates' flex fund policies before affiliates can start withholding \$400/arrival.

Details in next slide

Flex Fund Policy Collection

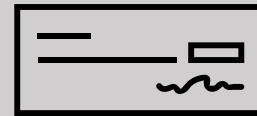
What needs to be included in my FY25 Flex Fund policy?

- ☐ *Amount of flex funds withheld from cases is clear*
- ☐ *Amount of flex funds withheld is no more than \$400 per individual*
- ☐ *Policy is clear if flex funds are withheld from all R&P individuals, or from specific R&P individuals*
 - *If flex funds are only withheld from certain individuals, this must be a fair and equitable policy*
- ☐ *Clear criteria to determine which cases will receive additional funds*
 - *Allowable to spend flex funds on anything that R&P direct assistance can be spent on*
- ☐ *Clear criteria to determine how funds will be allocated*
 - *Will funds be given to clients, or to vendors?*
- ☐ *Clear criteria for how disbursement will be tracked and managed*

UNTIL your FY2025 R&P Flex Fund Policy has been reviewed and approved by USSCB/MRS, you cannot withhold more than \$200 in flex funds from FY25 R&P arrivals

Flash Poll!

Does your office currently operate
Cash-Based R&P?



Cash-Based R&P

for your awareness AND action

Opting-in Post Arrival

Codified the ability to accommodate refugees/cases who request to opt-into Cash-Based R&P Services post-arrival. All post-arrival enrollments must follow an established policy and include individual case assessment.

Accommodates requests to be enrolled in CBRP post-arrival

Expands CBRP to Class B Cases

For Cash-Based R&P Services, expanded the ability to resettle Class B cases as appropriate (such as those who are labeled Class B due to having tattoos).

Class B arrivals can now do CBRP, as appropriate

Cash-Based R&P

for your awareness AND action

CA Language Update

For Cash-Based R&P Services, as with the material needs support section, incorporated the requirements under Post-Arrival Services and Case File Preparation and Maintenance into those relevant CA sections rather than listing all the Cash-Based requirements together in one section.

Health Screenings Follow-up

For Cash-Based R&P Services, changed the name from “well-being check” to “well-being check-in visit,” moved its requirement to the post-arrival section, added the refugee health screening to the list of services needing follow-up, specified that it can be a virtual or in-person visit, and extended its deadline to 90 days.

Refer clients for health screenings (by intake deadline), do the well-being check-in visit by day 90!

Cash-Based R&P

for your awareness AND action

Health Screening Assistance

**For Cash-Based R&P Services,
added the requirement to
assist these cases with
scheduling health screenings
if self-schedule is not
possible.**

***Affiliate must assist with
Health Screening (if client
cannot)***

Cash-Based R&P

New Case File Monitoring Tool (CFMT) – and CFMT Addendum - with Deadlines

P.A. Name				Int'l DOA	11/1/24	Domestic DOA	11/2/24	Client type	Refugee	
Case #		 Size				90th Day	1/29/25	MG:	No	
Cash-Based R&P Case Note Log Requirements										
1. Case Note Log (RF-4) required components				Service Date	Service Mode	Staff Name	Service Notes	Program Funder (or N/A)	Comments	
				Yes	Yes	Yes	Yes	Yes		
2. Appropriate Interpretation, as necessary only if 1 or more clients is present during service delivery who requires interpretation				Case Notes <u>or</u> Forms Indicate Compliance		No Compliance Indicated in Case File		Comments		
				Yes						
Required Cash-Based R&P Case File Forms				PRESENT Form	COMPLETE Form	Due Date	Service Date	Comments		
Programmatic Documents										
3. Copy of the R&P US Tie Assessment (RF-18A)				No	No	11/13/24				
4. Copy of the Cash-Based R&P Service Plan Assessment (RF-18B)				No	No	11/13/24				
5. Copy of the Cash-Based R&P Agreement (RF-18C) (signed by all adult case members)				No	No	11/13/24				
6. Copy of the Cash-Based R&P Client Resource Guide (RF-18D)				No	No	11/13/24				
7. Copy of the Cash-Based R&P Well-Being Check-In Visit Form (RF-18E)				No	No	1/29/2025				
8. I-94 (or copy of SIV visa) for each case member				No	No					
9. Assurance Form (MRIS)				No	No					
10. Copy of R&P Period Report that includes initial submission date				No	No	2/5/2025				

Cash-Based R&P – majority of service deadlines are within seven working days of domestic arrival (the date of intake)

Cash-Based R&P

New Case File Monitoring Tool (CFMT) – and CFMT Addendum - with Deadlines

Cash-Based R&P Service Documentation	PRESENT Case Note or Form	COMPLETE Case Note or Form	Due Date	Service Date	Comments
Service Counseling					
11. Case is eligible for Cash-Based R&P enrollment, according to site's Cash-Based R&P Policy and Cooperative Agreement guidance	No	No			
12. Reception services provided (may be provided by UST) with appropriate interpretation as needed	No	No	11/2/24		
13. Counseling provided by R&P staff regarding recommended material needs support with appropriate interpretation as needed	No	No	11/13/24		
14. Intake Interview provided by R&P staff with appropriate interpretation as needed	No	No	11/13/24		
15. Counseling regarding any necessary post-arrival services with appropriate interpretation as needed	No	No	11/13/24		
16. Assistance with scheduling initial health appointment (required unless refugees can self-schedule in resettlement location - if clients can self-schedule, this must be clearly noted) with appropriate interpretation as needed	No	No	11/13/2024		
16b. Clear documentation that client(s) was informed of time and location of initial health screening, if scheduled by staff with appropriate interpretation as needed	N/A	No	11/13/2024		
17. Well-Being Check-In Visit with appropriate interpretation as needed	No	No	1/29/2025		
18. Documentation that case info was submitted to USCCB/MRS for monthly cash-based enrollment report to PRM	No	No	12/2/2024		

Cash-Based R&P – majority of service deadlines are within seven working days of domestic arrival (the date of intake)

Cash-Based R&P

New Case File Monitoring Tool (CFMT) – and CFMT Addendum - with Deadlines

R&P Financial Documentation (required forms)	PRESENT Form	COMPLETE Form	Comments
Proof of direct assistance payments:			
19. R&P Summary Financial Record (RF-19)	No	No	
20. Adult acknowledgement of receipt of direct assistance (RF-35) – e.g. direct payments to case; goods bought or payments made on case's behalf	No	No	
21. Check payments to client, vendor, etc.	No	No	
22. Receipts (written acknowledgement received upon payment for goods/services) (if applicable)	No	No	
23. Invoices/Bills (a request for payment) (if applicable)	No	No	
24. Disbursement of R&P funds by 90 days, with most/all funds spent on case's material needs (disbursement of funds should be soon after Cash-Based R&P Client Agreement was signed)	No	No	
Proof of cash, in-kind, and volunteer support (if applicable):			
25. Adult case member acknowledges receipt of private contributions: in-kind goods, services, and/or private cash (if applicable)	No	No	
26. Volunteer record and/or donated miles (RF-20B or equivalent) (if applicable)	No	No	
27. Donated professional services: pro bono invoice or documented local fair market value for service (if applicable)	No	No	

Note that for a Cash-Based R&P case, some of these financial fields (such as receipts, invoices, in-kind donations, volunteer services) might be N/A

Service Provision

*for your awareness**

Added to the Limitation of Responsibilities clause to **accommodate for when services cannot occur according to requirements due to unusually high arrivals**, requiring a case note and the prioritization of refugee well-being.

- Support for affiliates during high arrivals

Added the phrase "Assistance with..." in front of Post-Arrival Services to **clarify PRM's requirement that the affiliate begin the process, not complete the service**, by the deadline.

- Clarity of what is expected by a service due date

Removed "clear and detailed" from the requirement that case files include a record of core services and added that the record may include separate documents to **discourage affiliates from over-documenting services** in the case file and the case note log.

- Further simplifies documentation requirements for core services

Separated the new service plan requirement out from the intake requirement, for clarity.

- Clarifies service plan versus intake requirements – service plans are no longer REQUIRED to be done DURING intake appointment

Removed quantities regarding sheets and blankets and replaced with "sufficient seasonally appropriate linens."

Service Provision

for your action

Revised the requirement about refugee receipt of EADs to provide guidance about EADs that get lost in the mail.

Revised the CO topic, “Role of the Local Resettlement Agency” to help manage refugee expectations and address discrepancies across refugees and/or local affiliates about required vs. needed furnishings and supplies.

Refugees must now receive assistance to change their address via individual myUSCIS accounts on my.USCIS.gov.****

(USCCB/MRS) Service plans are no longer required for attached refugee minors (M2, M3, M5, M6, M7)

Flash Poll!

Are you comfortable navigating
the USCIS website?



Stakeholder Coordination (Quarterly Consultations)

Updated Responsibilities

Revised Community Consultation and Coordination Requirements to reflect new joint ORR-PRM policies.

For now: conduct QCs as you did in FY2024

Implementation date: TBD

for your awareness AND action

Eventually, your SRC's office will hold responsibility for conducting QC's

These QC's will focus more on **collaboration** of community capacity to support projected arrivals, community **strategies to support** refugee integration and participation in civic life, **coordination** of supports and service

Affiliates will be **responsible for follow-up** and their own **record keeping** (which can be shared amongst local offices)

New Case File Forms and Templates

These documents can be found on MRSCConnect under R&P > Program Administration

Updated – Standard R&P

- [USCCB/MRS RF-24 Case File Monitoring Tool \(rev. 10/2024\)](#)
- [FY25 R&P Case File Monitoring Tool Addendum \(rev. 10/2024\)](#)
- [RF-7 R&P Service Plan \(rev. 10/2024\)](#)
- [RF-18A USCCB/MRS R&P US Tie Assessment \(rev. 10/2024\)](#)
(required for cash-based R&P, may be helpful for other R&P cases)

Updated – CBR&P Specific

- [RF-18A USCCB/MRS R&P US Tie Assessment \(rev. 10/2024\)](#)
- [RF-18B USCCB/MRS Cash-Based R&P Service Plan Assessment \(rev. 10/2024\)](#)
- [RF-18C USCCB/MRS Cash-Based R&P Agreement \(rev. 10/2024\)](#)
- [RF-18D USCCB/MRS Cash-Based R&P Client Resource Guide \(rev. 10/2024\)](#)
- [RF-18E USCCB/MRS Cash-Based R&P Well-Being Check-In Visit Form \(rev. 10/2024\)](#)
- [Cash-Based R&P Case File Monitoring Tool \(RF-24\) \(rev. 10/2024\)](#)
- [Cash-Based R&P Case File Monitoring Tool Addendum \(rev. 10/2024\)](#)

Summary

Cash-Based R&P

- Codified the ability to accommodate refugees/cases who request to opt-into Cash-Based R&P Services post-arrival. All post-arrival enrollments must follow an established policy and include individual case assessment.
- For Cash-Based R&P Services, expanded the ability to resettle Class B cases as appropriate
- For Cash-Based R&P Services, as with the material needs support section, incorporated the requirements under Post-Arrival Services and Case File Preparation and Maintenance into those relevant CA sections rather than listing all the Cash-Based requirements together in one section (see strike-out language above).
- For Cash-Based R&P Services, changed the name from “well-being check” to “well-being check-in visit,” moved its requirement to the post-arrival section, added the refugee health screening to the list of services needing follow-up, specified that it can be a virtual or in-person visit, and extended its deadline to 90 days.
- For Cash-Based R&P Services, added the requirement to assist these cases with scheduling health screenings if self-schedule is not possible.

Service Provision:

- Removed “clear and detailed” from the requirement that case files include a record of core services and added that the record may include separate documents to discourage affiliates from over-documenting services in the case file and the case note log.
- Added to the Limitation of Responsibilities clause...
- Removed quantities regarding sheets and blankets and replaced with “sufficient seasonally appropriate linens.”
- Separated the new service plan requirement out from the intake requirement, for clarity.
- Added the phrase “Assistance with...” in front of Post-Arrival Services to clarify PRM’s requirement that the affiliate *begin* the process, not *complete* the service, by the deadline.
- Revised the requirement about refugee receipt of EADs to provide guidance about EADs that get lost in the mail.
- Refugees must now receive assistance to change their address via individual myUSCIS accounts on my.USCIS.gov.
- Revised the CO topic, “Role of the Local Resettlement Agency” to help manage refugee expectations and address discrepancies across refugees and/or local affiliates about required vs. needed furnishings and supplies.
- **USCCB/MRS has removed requirement for service plans for attached refugee minors (M codes M2, M3, M5, M6, M7)**

Summary

PRM- Administrative

- For monitoring purposes, PRM may now request both evidence of assessment for cases resettled through Cash-Based R&P Services and affiliate policies on Cash-Based R&P Services.
- Revised the definition of “community sponsorship” to better incorporate individualized volunteer support.
- Incorporated throughout all Cooperative Agreements “remote placement community partners” alongside “affiliates” and “co-sponsors,” when relevant, and for RAs who resettle through remote placement, removed redundancies from the Remote Placement section of the Cooperative Agreement.

Affiliate finances:

- Increased R&P Per Capita Direct Assistance from \$1325 to \$1650 and Affiliate Capacity Per Capita from \$1100 to \$1350. *[Note that USCCB is operating a tiered system for affiliate per-capita, ranging from \$1250-\$1450]*
- Increased the flexible funding portion of the direct assistance per capita from \$200 to \$400. The new minimum direct assistance is \$1250. *[FY25 flex fund policy must be approved by USCCB before affiliate can withhold more than \$200 in flex funds]*
- Removed language regarding Additional Direct Assistance.
- Strengthened requirements for affiliate flex fund policies and created a requirement that RAs must create standards for reviewing flex fund policies and that those standards must be approved by PRM.

HQ- USCCB

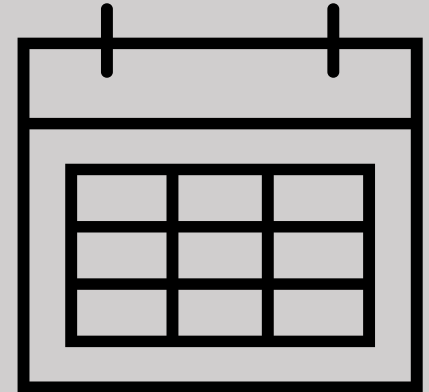
- For both ERMA and MRA quarterly performance reports RAs will be required to distinguish between the number of clients, broken out by refugee and SIVs, served under the MRA and the ERMA awards. For monitoring reports, in addition to including findings and recommendations RAs must notate the number of clients served under each award whose case file was reviewed or who received a home visit as part of each reported monitoring.
- RA monitoring reports must now include evidence that the affiliate’s flex fund policy include clear criteria to determine which cases will receive additional funds, how funds will be allocated, and how disbursement will be tracked and managed

Quarterly Consultations

- Revised Community Consultation and Coordination Requirements to reflect new joint ORR-PRM policies. *[As of 10/29/2024, this requirement is on hold – continue to schedule and conduct QCs as you did in FY24]*

Reminder:

- Increased per-capita (direct assistance – \$1650/arrival) went into effect **10/1/2024** - USCCB/MRS will monitor for the higher per-capita for all arrivals on/after 10/1/2024
- USCCB/MRS will monitor for all other FY25 changes beginning with arrivals on/after 12/1/2024





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Questions?

Please share your
thoughts.

Anonymous Survey

You can scan this QR code with
your phone's camera.

Or, there is a link to the same
survey in the chat.

