SETTLEMENT NARRATIVE REPORT

Guide for Recipients

Table of Contents

OVERVIEW

Narrative reports are used to describe progress on activities, provide context to statistical information collected in iCARE and outline concerns, challenges or changes that may impact the success of your program. As a recipient, you are required to submit narrative reports according to the reporting periods and due dates outlined in Schedule 4 of your Contribution Agreement (CA).

Your Program Officer (PO) will review narrative reports submitted by your organization. If additional information is required on a narrative report, your PO will communicate this to you and may return the report for you to review and respond. Your PO will advise you if the narrative report has been completed satisfactorily.

The purpose of this guide is to provide information and examples for you to reference while completing the narrative report template. It is important to review this guide in its entirety to answer any preliminary questions you may have and ensure the report is completed in a time-effective and accurate manner.

GUIDELINES FOR NARRATIVE REPORTING

- All information included in this report must be specific to the reporting period referenced.

- If there are multiple activities under a single programming component, complete separate responses for each activity to match Schedule 1 of the CA.

- For each <u>activity</u> indicated in Schedule 1 identify whether targets are "On", "Over" or "Under" target based on planned outputs for the reporting period. Responses must be solely based on clients eligible to receive IRCC-funded services, as per section 2.5 of the CA Articles. Additionally, target responses must align with the PDF iCARE monthly and quarterly reports.

- "Output Target" refers to the expected number of services to be delivered for the reporting period. "Client Target" refers to the number of clients expected to be served during the reporting period. In some activities, the output and client targets will be the same, as service is on an individual basis (i.e. NAARs, Language Assessment, Support Services, etc.). It is unnecessary to repeat information for both "Output Target" and "Client Target" sections for these activities.

- "On Target" should be understood to mean activity targets have been met, according to the portion of forecasted outputs to be delivered and clients to be served throughout the reporting period.

- It is unnecessary to provide written explanations for activities that are running as expected and targets that have been met or exceeded. However, if your organization wishes to elaborate on programming, examples have been provided throughout the document which outline the expected content and format of narrative responses.

- Do not reiterate numerical responses or statistical data that is already included in your monthly iCARE reports unless it is helpful in providing context to your narrative explanation. For additional resources related to iCARE, refer to the iCARE Resources section of this document.

- This report is meant to capture progress on activities and provide organizational updates to inform regular communication with your PO. Ensure that your PO is notified of time-sensitive issues as they occur. For example, if there are newly emerging considerations that require you to make changes to your programming, or there was an incident or issue that your PO should be notified of, do not rely exclusively on the narrative report as a means of communication. Rather, directly contact your PO to ensure concerns or requests can be addressed in a time-effective manner.

- The narrative report is for the PO's reference. It is advised that focus be placed on deliverables that are directly tied to the CA, and solutions that can be addressed with the PO. Broader issues relevant to the entire fiscal year should be identified on the Annual Project Performance Report (APPR) or Annual Performance Report for Community Partnerships (APRCP), which are reviewed by both the PO and the Settlement and Integration Policy (SIP) branch of the Department.

- For additional support related to narrative report completion, please contact your PO.

DIRECT ACTIVITIES:

Needs Assessments and Referrals

Output Description:
Automatically populated based on Schedule 1 of CA.

Output Target:

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If service targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On Target:
N/A or Example

Our organization delivered an increased number of assessments for highly skilled and educated newcomers, which led to additional client referrals to provincial labour market services during the reporting period. NAARs services were on target for the reporting period.

Over Target:
N/A or Example

Due to a recent influx of GARs, our organization identified clients who would benefit from a case management approach. Additional sessions were required to ensure referrals were frequently reassessed and made according to the identified needs and assets of clients. Sessions exceeded target by X for reporting period.

Under Target:

In-person NAARs sessions were reduced to comply with social-distancing regulations. Clients were hesitant to participate in online intake sessions, due to online security concerns. Our organization is developing information sessions for clients to learn about the privacy and security protocols we have in place for online program offerings. NAARs sessions were under target by X for reporting period.

Client Target:

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If client targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:
N/A or Example

Our organization has continued to implement community outreach strategies to ensure potential clients are aware of our services. We have noticed that outreach through social media platforms such as Facebook and Instagram have been very successful. Clients served were on target for the reporting period.

Over target:
N/A or Example

Our organization is now offering NAARs services in an online setting. This has permitted additional clients to be served, exceeding what was initially forecasted for the reporting period.

Under target:

Our organization received fewer newcomer clients than originally forecasted for the reporting period. We are actively reaching out to partnering organizations and local educational institutions to ensure newcomers are aware of NAARs services available to them to further improve their settlement journey.

Client Referrals:

1. *For the current reporting period, indicate the top three needs identified by clients that could not be accommodated through existing programming in the community (funded by the Department or otherwise), and therefore could not be successfully referred.*

2. *Indicate the number and demographic of clients who identified each of these specific needs, as well as the barrier (e.g., lack of service availability, extensive wait times, prohibitive cost, etc.).*

Next steps:
Address the following as appropriate based on responses for this activity:

a) *Steps that will be taken to address being under target for the reporting period.*
b) *Actions already taken to alleviate any contributing circumstances.*
c) *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous narrative report for this activity, provide an update on the status of those items.

<u>Information and Orientation</u>

Output Description:
Automatically populated based on Schedule 1 of CA.

Output target:
Number of Information and Orientation sessions delivered vs. planned for the reporting period:

    ☐On target
    ☐Over target
    ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in session offerings that have been observed under this activity. If service targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target: N/A or Example Information sessions about the Canadian public school system were well attended by newcomer parents, as children were preparing to return to in-person classes. Session targets were met for reporting period.
Over target: N/A or Example Our organization noted additional requests for information sessions regarding the COVID-19 vaccine, which we accommodated in partnership with the local health authority. Session targets were exceeded by X for reporting period.
Under target: Finances and banking information sessions received less client enrollment than forecasted for the reporting period. Our organization noted that many new clients had received this information from other service providers in the local area. Session targets were under by X for reporting period.

Client target:

Number of clients served vs. planned for reporting period:

    ☐On target
    ☐Over target
    ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If clients targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

<table>
<tr><td>

On target:
N/A or Example

Our organization noted an increase in attendance of newcomer young adults for information sessions regarding public transit. This was largely due to the beginning of the new school year for high schools and universities in the local area.
</td></tr>
<tr><td>

Over target:
N/A or Example

Since the opening of a new meat-packing plant, our organization has noted a trend in newcomer secondary migration to the local area. We have enrolled more clients than forecasted for information sessions regarding public services available in the community. Client targets were exceeded by X for reporting period.
</td></tr>
<tr><td>

Under target:

Less clients were able to attend outdoor water safety information sessions than forecasted for the reporting period. This was due to unexpected facility closures related to poor weather. Information sessions were not conducive to an online environment. Client targets were under by X for reporting period.
</td></tr>
</table>

Client Referrals:

Indicate if French-speaking clients were informed of and referred to Francophone organizations.

Next steps:

Address the following as appropriate based on responses for this activity:

   a) *Steps that will be taken to address being under target for the reporting period.*
   b) *Actions already taken to alleviate any contributing circumstances.*
   c) *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous narrative report for this activity, provide an update on the status of those items.

Employment-Related Services

Output Description:
Automatically populated based on Schedule 1 of CA.

Output target:
Number of Employment-Related Services delivered vs. planned for the reporting period:

    ☐On target
    ☐Over target
    ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in session offerings that have been observed under this activity. If service targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:
N/A or Example

Our employment programming was initially focused on resume writing. However, we expanded session offerings to include interview preparation courses due to increased interest from clients.

Over target:
N/A or Example

Due to a surge in requests from clients, our organization delivered additional networking sessions to foster newcomer engagement with local employers. The sessions were well attended, as we offered the programming both in-person and online. This approach proved to be successful, as the flexible format encouraged greater employer and client participation. Session targets were exceeded by X for reporting period.

Under target:

Programming offered did not align with the expressed interest of clients during the reporting period. While our organization offers employment counselling, many clients inquired about work placement programs. Thus, we offered less sessions than expected, due to low demand. Our organization referred clients to settlement agencies in the local area who offered programming to meet their needs. Session targets were under by X for reporting period.

Client target:
Number of clients served vs. planned for reporting period:

    ☐On target
    ☐Over target
    ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If client targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

On target:
N/A or Example

Our organization served an increased number of newcomer parents of young children who expressed interest in seeking part-time employment.

Over target:
N/A or Example

Our organization noted increased client participation in online employer networking workshops. The virtual format permitted client attendance to exceed the initial workshop attendee limit, as there were no longer attendee limitations associated with the workshop space. Client targets were exceeded by X for reporting period.

Under target:

Our organization had less clients registered than forecasted for interview preparation and resume writing workshops. Client targets were under by X for reporting period.

Example Responses:

Client Referrals:

Indicate if French-speaking clients were informed of and referred to Francophone organizations.

Next steps:

Address the following as appropriate based on responses for this activity:

    a)   Steps that will be taken to address being under target for the reporting period.
    b)   Actions already taken to alleviate any contributing circumstances.
    c)   *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous narrative report for this activity, provide an update on the status of those items.

<u>Community Connections</u>

Output Description:
Automatically populated based on Schedule 1 of CA.

Output target:
Number of Community Connections sessions delivered vs. planned for the reporting period:

  ☐On target
  ☐Over target
  ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in session offerings that have been observed under this activity. If service targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target: N/A or Example Programming initially focused on connecting newcomers to Canadian citizens expanded session offerings to include intercultural and diversity workshops, as our organization noted increased interest from clients on these particular topics.
Over target: N/A or Example Our organization received many requests from clients to participate in Conversation Circles programming. The Community Connections programming team planned one additional session per week to meet this need. Sessions exceeded target by X for reporting period.
Under target: Less volunteers were available to participate in our Canada Connects program during the reporting period. We plan to utilize social media platforms and engage with post-secondary institutions to spread greater awareness about volunteer opportunities at our organization. Sessions were under target by X for reporting period.

Client target:

Number of clients served vs. planned for reporting period:

  ☐On target
  ☐Over target
  ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If client targets have been met or exceeded, an explanation is not

required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:
N/A or Example

Programming initially designed to connect newcomer youth with Canadian citizens expanded its target demographic to include newcomer parents of young children, as there was increased interest from this client group throughout the reporting period.

Over target:
N/A or Example

Outdoor program offerings for large events permitted greater attendance than initially expected for our intercultural community event stipulated in Schedule 1. Clients served exceeded target by X for reporting period.

Under target:

Our organization noted challenges meeting SWIS programming targets for reporting period. Due to social distancing regulations implemented by local school divisions, less SWIS workers were able to work on-site to provide direct services to clients. We are working to expand online SWIS programming. Clients served were below target by X for reporting period.

Client Referrals:

Indicate if French-speaking clients were informed of and referred to Francophone organizations.

Next steps:

Address the following as appropriate based on responses for this activity:

> a) *Steps that will be taken to address being under target for the reporting period.*
> b) *Actions already taken to alleviate any contributing circumstances.*
> c) *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Language Training (In-person)

Output Description:
Automatically populated based on Schedule 1 of CA.

Output target:

Number of language training courses offered vs. planned for the reporting period:

☐On target
☐Over target
☐Under target

Include the number of courses over or under target, as applicable, as well as the contributing circumstances. Unexpected class closures that are not a part of the course schedule on file can also be reported here. Also include any relevant trends or changes in client demographics that have been observed under this activity. If the activity is now provided in a blended service model (both online and in-person) due to the pandemic, you do not need to report separately for each service format. If service targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

> **On target**:
> N/A or Example
>
> Our organization noted increased client interest for additional CLB 3 courses. CLB 2 classes were not well attended throughout the reporting period. Thus, we changed the CLB 2 class offerings to CLB 3, to meet the apparent client need.

> **Over target:**
> N/A or Example
>
> Our organization received multiple client referrals from local settlement organizations for in-person Literacy classes. Following consultations with our Program Officer, we offered an additional Literacy class to accommodate the waitlist.

> **Under target**:
>
> Due to pandemic-related closures of in-person services at our organization, language training was designated to an online platform. Literacy was not well attended once this transition took place. Thus, the course was closed for the remainder of the reporting period. Courses were below target by X.

Client Target:

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. This section will provide context to statistical data reported in iCARE or HARTS; you do not have to report the data here. If client targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:
N/A or Example

Due to reduced client need for Literacy training, our organization substituted one Literacy class for CLB 1-2 instruction, as there was an active waitlist for this language level. Client targets were met for reporting period.

Over target:
N/A or Example

Our organization has developed a seamless process for ensuring any and all seat vacancies are filled immediately. This has been done with careful waitlist management and frequent communication with clients to monitor availability and learning needs. Enrollment exceeded target by X% for the reporting period.

Under target:

Our organization had several seats vacant due to clients obtaining employment mid-month. As there was no existing waitlist for this class, the seats remained vacant for the duration of the class offering. Enrollment was under target by X for the reporting period.

Client Referrals:

Indicate if French-speaking clients were informed of and referred to Francophone organizations.

Next steps:

Address the following as appropriate based on responses for this activity:

   a)   *Action plan to address enrollment below 100%*
   b)   *Actions already taken to alleviate contributing circumstances*
   c)   *The number of clients receiving Language training in an online learning environment*
   d)   *Suggestions as to how your PO can provide support in addressing these issues*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Language Training (Online)

Output target:

Number of online language training spots offered vs. planned for the reporting period:

        ☐On target
        ☐Over target
        ☐Under target

Explain in paragraph or point form the contributing circumstances to target outcomes. Unexpected cancellations/closures that are not a part of the course schedule on file can also be reported here. Also include any relevant trends or changes in client demographics that have been observed under this activity. If service targets have been met or exceeded, an explanation is optional. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:

N/A or Example

The organization noted increased need for technical support throughout the reporting period. Clients were lent devices to engage with online language courses through the organization's device lending library. All language training courses were on target for the reporting period.

Over target:

N/A or Example

The organization's tablet lending program permitted additional clients to enroll in online language training. This required additional courses to be offered for CLB levels 2 and 3. Online language courses exceeded targets by X for reporting period.

Under target:

The organization noted a decline in enrollment for Literacy classes. Clients indicated there were exceptional challenges to learning this level in an online setting. Many clients requested to be placed on the in-person Literacy class waitlist. The organization ensured there were no other vacancies at other language training centres in the local area for clients to be referred to, prior to adding clients to the waitlist. Outputs were under target by X for reporting period.

Waitlist:

Have waitlisted clients been contacted every 60 days with updated information?

        ☐Yes
        ☐No
        ☐There were no waitlists of over 60 days in this reporting period

Identify promising practices and effective strategies related to waitlist management.

Next steps:

Address the following as appropriate based on responses for this activity:

- a)   Actions to be or already taken to alleviate contributing circumstances
- b)   Suggestions as to how your program officer can provide support in addressing these issues

Follow-up:
If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Language Assessment

Output Description:
Automatically populated based on Schedule 1 of CA.

Output target:
Number of language assessments conducted vs. planned for the reporting period.

       ☐On target
       ☐Over target
       ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes to client demographics that have been observed under this activity. If assessment targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On Target: N/A or Example   Language assessments that were primarily conducted in-person expanded program offerings to offer online services for rural communities outside of our service location. This permitted language assessment targets to be met throughout the reporting period.
Over target: N/A or Example   The inclusion of online language assessments permitted our organization to facilitate more sessions than initially scheduled for the reporting period. Sessions were over target by X.
Under target: Throughout the pandemic, our organization had been operating with reduced capacity. In-person assessments were limited by the number of individuals permitted on-site while maintaining social

distancing practices. This limited the number of staff available to assess clients. Thus, session targets were under by X for the reporting period.

Client Target:

Number of clients served vs. planned for reporting period:

☐ On target
☐ Over target
☐ Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If client targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On target:
N/A or Example

Our organization has continued to implement community outreach strategies to ensure potential clients are aware of our services. Our organization has noted that outreach through social media platforms have been very successful. Clients served were on target for the reporting period.

Over target:
N/A or Example

After speaking with our PO and making budget adjustments, our organization began to offer language assessments in an online setting. This has permitted additional clients to be served, exceeding what was initially expected for the reporting period.

Under target:

Our organization noted a decrease in clients requiring language assessments, as many language providers indicated that their clients were receiving these services at local education institutions and universities. Our organization is continuing to advertise our services within the community to spread awareness of our program offerings. Clients served were under target by X for reporting period.

Client referrals:

Indicate the following:

1. *Number of standalone appointments conducted in the reporting period for clients to obtain referrals to language training services funded by the Department where a language assessment was not necessary.*

2. *The top three language training or associated support service needs identified by clients that could not be accommodated through existing programming in the community (funded by the Department or otherwise), and therefore could not be successfully referred.*

3. *The number and demographic of clients who identified each of these specific needs, as well as the barrier (e.g., lack of service availability, extensive wait times, prohibitive cost, etc.)*

Focus on identifying the need and purpose, not necessarily a specific program. Responses should be limited to 50-100 words.

Next steps:

Address the following as appropriate based on responses for this activity:

a) *Steps that will be taken to address being under target for the reporting period.*
b) *Actions already taken to alleviate any contributing circumstances.*
c) *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Support Services (child care for language training or other long-term programming, on-site or subsidized)

Output target:

Number of child care spaces offered or available vs. planned for the reporting period

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes to scheduled programming that have been observed under this activity. Unexpected closures that are not a part of the schedule on file can also be reported here. For contracted spaces with third-party providers, this section can be used to address seat availability in the community. If services have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit response to 50-100 words.

Example Responses:

On Target:
N/A or Example

Our organization's subsidized childcare seats (third-party) recently moved facility locations throughout the reporting period. We worked with the third-party to communicate this change to clients, to ensure uninterrupted service delivery.

Over Target:
N/A or Example

Our organization began offering online childcare services to permit the enrollment of parents in online language training. After speaking with our PO and making adjustments to our budget, additional childcare spaces were made available. Seat offerings exceeded target by X for reporting period.

> **Under Target:**
>
> In-person programming was reduced due to social-distancing policies implemented by our organization. Thus, less children were on-site to receive childcare services, and seats were not filled. Childcare services were under target by X for reporting period.

Client Target:

Number of clients served vs. planned for reporting period:

       ☐On target
       ☐Over target
       ☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes that have been observed under this activity. If client target has been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

> **On Target:**
> N/A or Example
>
> Our organization noted increased childcare registration from clients with low English language proficiency. Additional interpretation services were required when clients enrolled their children for childcare services. Enrollment targets were met for reporting period.

> **Over Target:**
> N/A or Example
>
> After discussing necessary budget adjustments with our PO, our organization began offering online childcare services to assist parents enrolled in online language training. In conjunction with in-person sessions, enrollment targets were exceeded by X for reporting period.

> **Under Target:**
>
> Numerous newcomer children were able to transition from childcare services to in-person preschool classes, and no longer required childcare services during the reporting period. Enrollment was under target by X for reporting period.

Client Referrals:

N/A

Next steps:

Address the following as appropriate based on responses for this activity:

    a)   *Steps that will be taken to address being under target for the reporting period.*
    b)   *Actions already taken to alleviate any contributing circumstances.*
    c)   *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Support Services (occasional child care, interpretation, translation, client transportation assistance, provisions for clients with disabilities)

Output target:
Number of support services delivered/offered vs. planned for the reporting period:

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes in client demographics that have been observed under this activity. If service targets have been met or exceeded, an explanation is not required. Being over or under target in this category is not a major concern unless there are financial implications (e.g., slippage or requiring additional funds to alleviate barriers). Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 word.

Example Responses:

On Target: N/A or Example Our organization noted that additional interpretation services were requested by clients with young children to support their transition into the Canadian school system.
Over Target: N/A or Example Additional interpretation services were required throughout the reporting period, as our organization was permitted to host a vaccination clinic in partnership with the local health authority. Thus, targets were exceeded by X for reporting period.
Under Target: In-person programming was reduced due to social distancing policies related to the pandemic. Thus, transportation support was required less than expected. Services were under target by X for reporting period.

Client Target:

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

Explain in paragraph or point form any anomalies, relevant trends or changes that have been observed under this activity. If client target has been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts. Please limit responses to 50-100 words.

Example Responses:

On Target: N/A or Example Our organization noted increased enrollment of senior clients in Information and Orientation programming. To access services, many clients requested taxi vouchers, as they were hesitant to commute on public transit. Services were on target for reporting period.
Over Target: N/A or Example Our organization enrolled three new clients with hearing impairments in our Language programming. To meet their needs, visual aid and sign language services were provided during their classes. Support services were over target for the reporting period.
Under Target: Our organization noted a decreased need for childminding in September, as many clients enrolled their children in pre-school and kindergarten. Forecasted client targets for reporting period were not met.

Client Referrals:

N/A

Next steps:

Address the following as appropriate based on responses for this activity:

a) *Suggestions as to how your PO can provide support in addressing these issues*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

INDIRECT ACTIVITIES

*The following are selected **examples** of narrative responses for Indirect activities, and are not a comprehensive representation of activity options related to Indirect programming.*

Indirect – Community Engagement

Output target:
Number of services offered vs. planned for the reporting period:

> ☐On target
> ☐Over target
> ☐Under target

If the activity outlined in Schedule 1 contains targets, indicate the annual target(s) compared to current figures as of the end of the current reporting period. Additionally, indicate deliverables undertaken during the reporting period and their outcomes. If the activity is running as expected and targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts.

Example Responses:

On Target: N/A or Example 18 of the 36 annual anti-racism and intercultural workshops have been completed thus far in the fiscal year. Since we began offering these workshops, our organization has noted greater community interest and engagement with volunteer opportunities in local Settlement programs.
Over Target: N/A or Example Additional workshops were facilitated throughout the reporting period, as more organizations and private businesses requested our services. 60% of workshop participants from the community have volunteered to participate in our newcomer employment job fair, scheduled to be hosted in the next reporting period. Our organization exceeded targets and facilitated 20 of the 36 annual workshops throughout the reporting period.
Under Target: Due to pandemic-related closures of small businesses and organizations, we have been unable to facilitate the number of workshops initially scheduled for the reporting period. Our organization is working to adapt our workshops to an online format to ensure the continuation of services in the community. We have completed 5 of 36 annual workshops so far this fiscal year.

Client Target:

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

As client targets are not applicable for indirect activities, an explanation is not required.

Example Responses:

N/A

Client Referrals:

N/A

Next Steps:

Address the following as appropriate based on responses for this activity:

   a)   Steps that will be taken to address being under target for the reporting period.
   b)   Actions already taken to alleviate any contributing circumstances.
   c)   Suggestions as to how your PO can provide support in addressing this issue.

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Indirect – Tool Development

Output target:
Number of services offered vs. planned for the reporting period:

☐On target
☐Over target
☐Under target

If the activity outlined in Schedule 1 contains targets, indicate the annual target(s) compared to current figures as of the end of the current reporting period. Additionally, indicate deliverables undertaken during the reporting period and their outcomes. If the activity is running as expected and targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts.

Example Responses:

On Target:
N/A or Example

Our organization is partnering with service providers in the community to develop a standardized NAARS tool to improve consistent assessment and referral processes. The NAARS tool working group met twice throughout the reporting period to discuss components and confirm the first draft of the standardized questionnaire. Our organization is on target and on track to complete the tool, according to Schedule 1 of our CA.

Over Target:
N/A or Example

Our organization has exceeded targets as we are completing the NAARs tool in consultation with partnering service providers ahead of schedule. The tool is now being tested with 10 NAARs providers in our region.

Under Target:

Our organization is behind schedule in the confirmation of the first draft of the NAARs tool. While we intended to host two meetings to discuss the tool framework and components, we were unable to coordinate schedules with our multiple working group members. This was largely due to the meetings being scheduled during the summer months, when many members of the working group were away. An additional meeting will be scheduled in the following reporting period to ensure the project objectives are completed on time.

Client Target

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

As client targets are not applicable for indirect activities, an explanation is not required.

Example Responses:

N/A

Client Referrals:

N/A

Next Steps:

Address the following as appropriate based on responses for this activity:

- *a) Steps that will be taken to address being under target for the reporting period.*
- *b) Actions already taken to alleviate any contributing circumstances.*
- *c) Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Indirect – Research Activities

Output target:

Number of services offered vs. planned for the reporting period:

☐On target
☐Over target
☐Under target

If the activity outlined in Schedule 1 contains targets, indicate the annual target(s) compared to current figures as of the end of the current reporting period. Additionally, indicate deliverables undertaken during the reporting period and their outcomes. If the activity is running as expected and targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts.

Example Responses:

On Target: N/A or Example Throughout the reporting period, our organization's research team issued a survey to gather information related to the success of employment programming and its relation to newcomer employment obtainment in the local job market. Further, we hosted two of our four scheduled working group meetings with participating stakeholders to discuss the survey composition, release and results. Project is on target, according to the planned outputs in Schedule 1.
Over Target: N/A or Example Our organization is ahead of schedule, according to the outputs in Schedule 1. Survey results for our research related to newcomer employment obtainment were received and assessed by our research team and provided to the working group for discussion. Our research team has begun drafting the report.
Under Target: Our research project is behind schedule, as we have only met once with our working group to discuss survey compilation strategies. Although we had two meetings scheduled for the reporting period, necessary changes were made to accommodate the schedules of working group members.

Client Target

Number of clients served vs. planned for reporting period:

☐On target
☐Over target
☐Under target

As client targets are not applicable for indirect activities, an explanation is not required.

Example Responses:

N/A

Client Referrals:

N/A

Next Steps:

Address the following as appropriate based on responses for this activity:

- a) *Steps that will be taken to address being under target for the reporting period.*
- b) *Actions already taken to alleviate any contributing circumstances.*
- c) *Suggestions as to how your PO can provide support in addressing this issue.*

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

Indirect – Conferences

Output target:

Number of services offered vs. planned for the reporting period:

      ☐On target
      ☐Over target
      ☐Under target

If the activity outlined in Schedule 1 contains targets, indicate the annual target(s) compared to current figures as of the end of the current reporting period. Additionally, indicate deliverables undertaken during the reporting period and their outcomes. If the activity is running as expected and targets have been met or exceeded, an explanation is not required. Examples have been included below for reference if your organization chooses to provide a narrative response for "on" and "over" target contexts.

Example Responses:

On Target:

N/A or Example

Our organization has worked with partnering agencies to organize workshop presenters and facilitators for the event scheduled in the latter portion of the fiscal year. A portion of the deliverables were met in preparation for the upcoming conference. Conference scheduling is currently on track to meet deadlines stipulated in Schedule 1.

Over Target:

N/A or Example

Our organization has booked more conference presenters than initially expected, permitting the expansion of the conference from a one day event to a two day event. In consultation with our Program Officer, we were able to reinvest slippage within our budget to accommodate this expansion.

Under Target:

Due to pandemic-related closures, our organization was unable to facilitate the planned conference. We had not developed the necessary processes to transition the event to an online setting. Thus, in consultation with our PO, the conference will be postponed until the next fiscal year.

Client Target

Number of clients served vs. planned for reporting period:

      ☐On target
      ☐Over target
      ☐Under target

As client targets are not applicable for indirect activities, a response is not required.

Example Responses:

N/A

Client Referrals:

N/A

Next Steps:

Address the following as appropriate based on responses for this activity:

a) Steps that will be taken to address being under target for the reporting period.
b) Actions already taken to alleviate any contributing circumstances.
c) Suggestions as to how your PO can provide support in addressing this issue.

Follow-up:

If "Next Steps" had been identified on a previous Narrative Report for this activity, provide an update on the status of those items.

GENERAL CA UPDATES

Challenges

Describe challenges that may have arisen during the reporting period. Also include actions already taken to alleviate indicated challenges and whether it was successful, or alternative approaches that will be taken, if not successful.

Outstanding Advances

Indicate why any remaining advanced funds were left unspent, if applicable.

Follow-up

If challenges had been identified on a previous narrative report, provide an update on the status of those items.

Successes/Promising Practices

Describe any successes or promising practices achieved in this reporting period. Successes/Promising Practices should demonstrate the impact or changes experienced by newcomers, or visible in the community as a result of the CA's activities. This could include successful intersectional approaches taken by your organization or observed in program implementation, or client success in a particular settlement stream. Your organization may also include a description of the creativity and innovation that staff used to help achieve these outcomes. Use the following prompts, if relevant:

o Unique or complicating factors
o The actions or interventions performed
o Results/outcomes
o Quotes

Organizational Updates

Identify any changes over the course of the reporting period, or impending changes to the following. Only provide a response if applicable.

1) **Staffing**
   Identify relevant staffing changes related to program delivery, as well as any changes to administrative staff or board members. Identify the position(s) that were or will be vacated, the planned staffing action(s) to fill the position(s), and dates.

2) **Overhead**

Identify relevant changes in areas related to current rent, lease agreements and repairs as applicable. Specific overhead issues related to programming should be identified under the correlating activity.

3) Upcoming events or meetings
Identify new events or meetings that did not form part of the original CA schedules or those that will be removed from the approved CA activities. Include dates and locations of upcoming events or meetings where your organization may request a Department representative to attend or to speak.

4) Professional development
Identify conferences or professional development activities that have not previously been identified to the department. Also identify any resulting program closures or interruptions (if known).

5) Documentation on file
Confirm that the following forms on file are up-to-date. If not, include an updated version when submitting this report.

   ☐Basic Recipient Information form
   ☐Annual Financial Statement
   ☐Legal History Form
   ☐Lease agreements
   ☐Licenses (as applicable)
   ☐Detailed Salary Worksheet
   ☐Detailed Budget

6) Any Additional Comments
Please indicate all intersectional approaches your organization has implemented for staffing procedures, client engagement and program implementation. If your organization has any additional comments you would like captured in this report for the period that have not already been included elsewhere, this information should also be included here.

iCARE Resources

To ensure accuracy when indicating clients served for the reporting period, please solely refer to the PDF iCARE monthly and quarterly reports. If any discrepancies exist between iCARE data and your organization's internal service/client data, please contact your PO to discuss further. For additional iCARE resources regarding iCARE data interpretation, training and program-specific manuals, visit the Resources tab on the iCARE website.