

# Facilitating Quarterly Consultations (QCs)

Strategies for Effective Community Engagement and Coordination



## Why This Toolkit?

Switchboard has developed this toolkit in partnership with the Migration Policy Institute (MPI) to support public and private sector stakeholders involved in resettlement with conducting effective quarterly consultations (QCs). Those stakeholders include State Refugee Coordinators (SRCs), State Refugee Health Coordinators (SRHCs), national and local resettlement agency (RA) staff, ethnic community-based organizations (ECBOs), and others. After reading this toolkit, you will be able to:

- Describe the goals, requirements, and key elements of QCs in newcomer-receiving communities
- Explain the importance of effective data-sharing for promoting community connectedness and positive outcomes for newcomers
- Determine key data sources and agenda items necessary for accurate community capacity assessment across systems used by newcomers
- Apply facilitation best practices that increase the efficiency and impact of QCs

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## QC Background and Federal Requirements

Among organizations and local governing agencies engaged in receiving and supporting newcomers, QCs are essential processes by which communities gauge their capacity to provide resettlement and ongoing services to an increasingly wide range of individuals. These consultations have evolved over decades, as have the profiles and characteristics of those eligible for various services. Communication and coordination are more critical than ever before to avoid duplication of efforts, identify and fill service gaps, and ensure the success of service delivery for community members.

QCs are meetings with stakeholders who are integral to the successful resettlement and integration of all ORR-eligible newcomer clients. These meetings are not only a federal program requirement—they also provide RAs and stakeholders an opportunity to foster increased engagement within their community. The meeting is an opportunity to share best practices, program successes, and ideas for stakeholder collaboration.

The basis for QCs is more clearly understood by reflecting on references within federal law, federal regulations, and legal agreements from the founding of the refugee resettlement program. The Refugee Act of 1980, signed into law by President Jimmy Carter effective April 1, 1980, amended the Immigration and Nationality Act of 1965 (INA) and the Migration and Refugee Assistance Act of 1962. The Refugee Act revised procedures for the admission of refugees to the U.S. and established “a more uniform basis for the provision of assistance to refugees.”<sup>1</sup>

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<sup>1</sup> Public Law 96-212

**Table 1: Policy Implications for QCs According to the Immigration and Nationality Act of 1965**

Direct Quotation from INA Sec. 412 [8.U.S.C 1522] (2)	Policy Implications for QCs
<p><i>(A) The Director* and the Federal agency administering subsection (b)(1)** shall consult regularly (not less often than quarterly) with State and local governments and private nonprofit voluntary agencies concerning the sponsorship process and the intended distribution of refugees among the States and localities before their placement in those States and localities.</i></p>	<p>Federal government actors (ORR, PRM) require states and RAs to discuss projected newcomer arrivals on a quarterly basis.  <i>*Director of ORR</i>  <i>**Refers to PRM</i></p>
<p><i>(B) The Director shall develop and implement, in consultation with representatives of voluntary agencies and State and local governments, policies and strategies for the placement and resettlement of refugees within the United States.</i></p>	<p>States, RAs, and local governments must create policies and strategies for community integration.</p>
<p><i>(C) Such policies and strategies, to the extent practicable and except under such unusual circumstances as the Director may recognize, shall-</i></p>	
<p><i>(i) ensure that a refugee is not initially placed or resettled in an area highly impacted (as determined under regulations prescribed by the Director after consultation with such agencies and governments) by the presence of refugees or comparable populations unless the refugee has a spouse, parent, sibling, son, or daughter residing in that area</i></p>	<p>Placement of newcomers should avoid oversaturation of specific areas, unless the newcomer has a close family member in said location.</p>
<p><i>(ii) provide for a mechanism whereby representatives of local affiliates of voluntary agencies regularly (not less often than quarterly) meet with representatives of State and local governments to plan and coordinate in advance of their arrival the appropriate placement of refugees among the various States and localities</i></p>	<p>States, RAs, and local governments must quarterly assess projected capacity for newcomer arrivals.</p>
<p><i>(iii) take into account-</i></p>	
<p><i>(I) the proportion of refugees and comparable entrants in the population in the area,</i></p>	<p>Projected arrivals and services must be determined in relation to current populations.</p>
<p><i>(II) the availability of employment opportunities, affordable housing, and public and private resources (including educational, health care, and mental health services) for refugees in the area,</i></p>	<p>Participants must assess accessibility and availability of resources related to integration: employment, education, health care, etc.</p>
<p><i>(III) the likelihood of refugees placed in the area becoming self-sufficient and free from long-term dependence on public assistance, and</i></p>	<p>Newcomers must be able to attain self-sufficiency and independence from public assistance programs.</p>
<p><i>(IV) the secondary migration of refugees to and from the area that is likely to occur.</i></p>	<p>Participants must be aware of additional in- and out-migration of newly arrived and likely/anticipated newcomers in communities.</p>
<p><i>(D) With respect to the location of placement of refugees within a State, the Federal agency administering subsection (b)(1) shall, consistent with such policies and strategies and to the maximum extent possible, take into account recommendations of the State.</i></p>	<p>PRM will carefully consider what states and RAs recommend in terms of place based on content and conversations from QCs.</p>

Implementation of this federal law is in the hands of the experts at the federal agencies operating the program—in this case, ORR and PRM. ORR and PRM must determine how to comply with the law and report to Congress by determining regulations or contractual obligations to meet the goals of the law. Title 45 Section 400.5 (h) of the Code of Federal Regulations (CFR) requires that, in addition to compliance with the above Sec. 412 [8.U.S.C 1522] (2) of the INA, a state’s annual plan to ORR must:

“Provide that the State will, unless exempted from this requirement by the Director, assure that meetings are convened, not less often than quarterly, whereby representatives of local resettlement agencies, local community service agencies, and other agencies that serve refugees meet with representatives of State and local governments to plan and coordinate the appropriate placement of refugees in advance of the refugees' arrival.”

Just as ORR has applied this regulation to federal law, PRM in its Cooperative Agreements with RAs requires coordination and cooperation with public agencies. Over the decades, how national and local QCs have been conducted has varied widely due to the implementation of updated regulations, evolving methods of compliance with the annual Cooperative Agreement, and other emerging issues that attract popular attention. ORR and PRM have cooperated on various approaches over the years, including a recent period of co-convening quarterly phone calls with SRCs and SRHCs, in addition to QCs occurring locally. Ultimately, the original language in the INA can be interpreted and implemented variously at federal, state, and local levels, to most effectively communicate information and coordinate services to those eligible to receive them. This toolkit will assist QC conveners at all levels to enhance their QCs and better serve communities welcoming newcomers.

## Defining the Purpose of QCs Further According to Major Stakeholders

In September 2022, Refugee Council USA (RCUSA) engaged Switchboard to support discussions on improving the consultation process among SRCs, SRHCs, and RAs. The initial aim was to develop a universal tool or form to guide local and state conversations about resettlement capacity during planning processes. However, tri-sector discussions in April 2023 revealed that the complexity of these situations required more than a single form could provide.

**Table 2: Collected Responses to Purpose of Consultations by Sector (SRC, SRHC, or RA)**

SRCs	SRHCs
<ul style="list-style-type: none"> <li>• Coordination of resources from different sources; knowing where resources are and how they are being allocated</li> <li>• Learning about policy changes and projections</li> <li>• Fostering more discussion and engagement from the community</li> <li>• Interaction between sectors, broad cross-section of stakeholders</li> <li>• Coordination of seamless processes among stakeholders for refugees to access resources in their local communities</li> </ul>	<ul style="list-style-type: none"> <li>• Sharing challenges, barriers, and success stories</li> <li>• Transparency and acknowledgement of capacity challenges</li> </ul>
	RAs

The need for consultations to effectively plan for both regular arrivals and unexpected migrations called for a comprehensive review of the consultation process throughout the year. Switchboard's subsequent analysis explored whether QCs primarily serve as informational sessions or if, instead, they are intended to collaboratively address challenges, as illustrated above by three sectors' responses to the question, "What is the purpose of consultations?"

Federal regulations as defined in the Refugee Act, PRM's Cooperative Agreement, and the ORR State Plan are quite clearly defined, but the purposes of QCs can go beyond what is explicitly mentioned in these sources for overall improved community building and engagement. In broader terms than what can be found in the federal regulations, the purposes of QCs are to:

**Figure 1: Synthesized Purposes of QCs**



## Required Agenda Items and Participants for QCs

The presence of certain participants and agenda items is necessary for consultations to be federally compliant. Required agenda items include:

- Assessing community capacity for placement and service provision and planning for appropriate placement and arrival planning
- Assessing needs of refugees for services and assistance
- Using the best available data to project demand for refugee services and benefits

State and local providers have the freedom and flexibility, however, to set their own formal agendas and are benefited greatly by operating with a standard QC agenda template (to be discussed in the section "QC Facilitation Strategies and Best Practices"). In addition to these agenda items, QC policy also requires the presence of several key stakeholders, in addition to the RAs who are conveners alongside state representatives,<sup>2</sup> outlined below in Table 3.

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<sup>2</sup> See [DCL 24-09](#) for current ORR guidance on QC leadership duties of the state and QC participants.

**Table 3: Required Participants for QCs<sup>3</sup>**

<b>QC Stakeholder</b>	<b>Representatives</b>
<b>State Refugee Coordinator (SRC)</b>	SRC or a representative appointed on their behalf
<b>State Refugee Health Coordinator (SRHC)</b>	SRHC or a representative appointed on their behalf
<b>Local resettlement agencies</b>	Organizations providing Reception & Placement services and/or receiving ORR funds
<b>Local community service agencies and other agencies that serve refugees</b>	Interpreters and highly engaged community members volunteers ECBOs and community leaders from ORR-eligible populations Other local nonprofits/NGOs
<b>Representatives of state and local governments</b>	City Council members
	Mayor's Office
	City Manager's Office
	County Legislator's Office
	Higher elected officials (state/federal legislators, governor)
<b>Public school officials</b>	Local public school system (K-12)
	Community colleges and adult education/ESL providers
<b>Public health officials</b>	Federally Qualified Health Clinic staff (health screener provider)
	Local or county public health department staff
	Health/mental health service providers (clinics, hospitals)
<b>Welfare and social service agency officials</b>	Local administrators of TANF, SNAP, Medicaid, SSA, etc.
	Housing officials or landlords
	Child welfare services
	Workforce Investment Act recipients/implementers
	City neighborhood services
<b>Police or other law enforcement officials</b>	Local law enforcement
	Fire safety
	Emergency medical services
	Other emergency services
<b>Other attendees<sup>4</sup></b>	Employers/business leaders
	Mutual aid organizations
	Department of Motor Vehicles
	Local foundations/funders
	Representatives from the courts

<sup>3</sup> ORR's State Plan Template (under Admin Assurance for QCs, #6) lists the required stakeholders on the left.

<sup>4</sup> While these may not be required, they are highly suggested invitees who can add value to discussions about capacity. Rationale and justification for additionally invited participants is discussed in the section of this toolkit related to various domains of integration support for newcomers.

## Effective QC Data-Sharing Sources and Capacity Assessment

In addition to helping community stakeholders understand refugee challenges, QCs should also help refugee providers (SRCs, SRHCs, and local RAs) understand community capacity. While the QC process is meant to provide an avenue for informing community stakeholders to help them understand challenges, data sharing during QCs is often limited to available refugee arrivals data and program enrollment/participation. More robust engagement on other data relevant to resettlement requires an investment in understanding the patchwork of metrics that mainstream systems rely on to describe their capacities. With this understanding, QC conveners and participants can share and discuss data more effectively.

When data is leveraged and presented well in consultations, participants can identify specific service needs and create partnerships capable of implementing tailored solutions. Conversely, a lack of engagement with key system actors and/or insufficient data sharing can lead to miscommunications and missed opportunities regarding integration needs. By focusing on a more inclusive approach to data exchange, the QC process can better support coordinated efforts to meet the ever-evolving strengths and service needs of refugees.

### Key Players and Data Sources

Given that resettlement spans many key areas of work, it is important to consider some of the key system players and data sources across the following integration domains. In the following section of this toolkit, we will address key metrics, data sources, and players<sup>5</sup> to consult for more accurate assessments of capacity in QC communities.<sup>6</sup> The six integration domains we will explore in this toolkit are:

1. Early Childhood Education and Care (ECEC)
2. K-12 Education
3. Adult Education and Workforce Development
4. Health Care
5. Social Services and Public Assistance
6. Housing

## Early Childhood Education and Care

ECEC offers significant potential for supporting immigrant families—through two-generation success programs as well as by partnering with parents to support their children's healthy development, kindergarten readiness, and future school success. Despite the rapid growth in ECEC services over recent decades, research at the intersection of immigration and early childhood is still in the early stages. However, emerging studies are exploring key topics, like the mental health of young immigrant children; the challenges of providing linguistically and culturally competent services; and the benefits of nontraditional child care in immigrant communities.

The exchange of accurate data between early childhood systems and the refugee resettlement network is

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<sup>5</sup> Position title nomenclature for key contacts varies by state/localities.

<sup>6</sup> Many of the data sources suggested throughout the following pages vary in terms of local, state, and national contexts. QC stakeholders are encouraged to engage with data at all of these levels, as community-based services should be responsive to many changes and trends. Please read the introductory sections under each data heading carefully for considerations on how these data sources may support your QC coordination.



crucial for identifying the specific needs of refugees and other populations. Such information can help local ECEC systems determine where outreach and service provision is needed, as well as how linguistic and cultural competence capacities of programs should be adjusted. With the influx of newcomer children since 2021, ECEC programs face capacity strains, as many systems already struggle to provide linguistically and culturally competent services to immigrant and refugee families. Without precise data and collaboration with local refugee experts, it can be difficult for system leaders to address these challenges proactively. Increased data and information exchange related to state and local ECEC infrastructure can also contribute to better planning around career development for refugees seeking employment in this field, especially given the growth rate of ECEC educators with immigrant or refugee backgrounds.<sup>7</sup>

**Table 4: Key Metrics, Data Sources, and Players for Newcomer ECEC**

	Data Points and Sources (linked)	Key Players
<b>ECEC</b>	<ul style="list-style-type: none"> <li>• <a href="#">Maternal, Infant, and Early Childhood Home Visiting (MIECHV) rates of utilization</a></li> <li>• <a href="#">Child Care and Development Fund (CCDF) trends</a></li> <li>• <a href="#">Head Start and Early Head Start enrollment figures</a></li> <li>• <a href="#">School enrollment rates for young children</a></li> </ul>	<ul style="list-style-type: none"> <li>• MIECHV Specialist/Coordinator (state and local)</li> <li>• Deputy Superintendent</li> <li>• Early Care and Learning</li> <li>• Director, Office of Early Childhood/Early Learning (state and local)</li> <li>• Head Start Association President</li> <li>• Head Start Coordinator (state and local)</li> <li>• CCDF Administrator/Specialist (state and local)</li> </ul>

## K-12 Education

Public school systems are often highly sensitive to the impacts of new arrivals, and their specific capacities are often an important indicator of a broader community’s capacity to absorb newcomers. With every child in the U.S. guaranteed a free public education, funded in large part by state and local tax dollars, the strain on school capacities and budgets is often of key concern for localities. In order for local school districts to have time to plan for basics such as classroom space, mandated language support, and sufficient professional staffing, it is especially helpful to ensure newcomer students do not arrive without advance notice to local jurisdictions.

When preparing to integrate newcomer students into K-12 education systems, data profiles—where available—offer valuable insights into the demographics, needs, and characteristics of incoming students. This information helps schools and districts plan for classroom adjustments and additional supports such as English instruction, special needs accommodations, and social-emotional support, as well as language access for parents. Given their close and ongoing contact with immigrant children and families, schools often become key points of connection for other systems which need information about or access to these communities.

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<sup>7</sup> Maki Park et al., [Immigrant and Refugee Workers in the Early Childhood Field: Taking a Closer Look](#), (Washington DC: Migration Policy Institute, 2015).

Table 5: Key Metrics, Data Sources, and Players for Newcomer K-12 Education

K-12 Education	Data Points and Sources (linked)	Key Players
	<ul style="list-style-type: none"> <li>• <a href="#">Number of state/city/district K-12 English learners</a></li> <li>• Data on <a href="#">experiences and needs of refugee children in schools</a></li> <li>• <a href="#">Census data for educational attainment trends, availability of educational services, enrollment figures, public school financial records</a></li> <li>• Bilingual/English for Speakers of Other Languages class <a href="#">staff ratios</a></li> <li>• State/district/school report card <a href="#">English learner proficiency rates</a> in English and math</li> </ul>	<ul style="list-style-type: none"> <li>• Office of English Learners/Multilingual and Multicultural Education/Bilingual Education (state and local district)</li> <li>• Offices of Curriculum and Instruction (state and local)</li> <li>• Office of Special Education (state and local)</li> <li>• Office of Family Engagement Office Director (state and local)</li> <li>• Title III Director/Director of English Learners (state and local)</li> <li>• Department of Education Director of Federal Programs (state and local)</li> <li>• Director of Career and Technical Education</li> <li>• Refugee School Impact Grant Coordinator(s)</li> <li>• Director, Student Support Services/Counseling</li> </ul>



## Adult Education and Workforce Development

Quickly attaining employment is the primary focus of the U.S. Refugee Admissions Program (USRAP), with the Reception and Placement (R&P) program prioritizing self-sufficiency within the first 90 days. Research indicates that—despite this intense focus on employment—adult education, workforce development, and labor trends are often overlooked in QCs. Adult education services tend to focus on serving immigrants through English and basic education courses, while workforce development programs can be challenging for refugees to access due to language barriers, educational requirements, lack of child care, transportation costs, and the wages lost through participating in training or degree programs without pay.

Despite these barriers to participation, adult skills programs are often locally accessible, presenting an opportunity for collaboration with system leaders. By sharing information about the language skills, educational backgrounds, and professional experience of new arrivals, collaborative efforts may emerge, resulting in services better suited to the unique needs of refugee communities.

**Table 6: Key Metrics, Data Sources, and Players for Newcomer Adult Education and Workforce Development**

	Data Points and Sources (linked)	Key Players
<b>Adult Education and Workforce Development</b>	<ul style="list-style-type: none"> <li>• <a href="#">Unemployment rate, Workforce Innovation and Opportunity Act (WIOA) Title I and II trends</a></li> <li>• <a href="#">Labor shortages</a></li> </ul>	<ul style="list-style-type: none"> <li>• American Job Center Director(s)</li> <li>• WIOA Title I Administrator/Specialist</li> <li>• Office Director/Coordinator, local Office of Adult Education</li> <li>• State WIOA Title II Director/Administrator/Specialist</li> <li>• Director, state workforce agency</li> <li>• Local workforce development board director</li> <li>• Local community college deans for Workforce English for Speakers of Other Languages, and/or Integrated Education and Training (IET) programs</li> <li>• Local education agencies (LEAs) that provide adult education and/or IET programs</li> </ul>

## Healthcare

Government health care programs play a critical role in the successful integration of refugees, primarily through access to federal means-tested benefits like Medicaid and the Children's Health Insurance Program (CHIP). Adequate health care coverage allows refugees to address both physical and mental health needs, some of which may have gone untreated, or chronically underattended to, before arriving in the U.S.



Despite being immediately eligible for Medicaid and CHIP, refugees often face challenges in navigating the complex U.S. health care system. Local health care providers may also struggle with capacity issues, especially when sudden and unexpected demands arise, such as the need for follow-up care for an infectious disease like tuberculosis. Resettlement actors must stay informed with up-to-date data on health care trends and service availability, including which health care providers are operating over or under capacity and which facilities are best equipped to provide linguistically and culturally competent care to refugee populations.

**Table 7: Key Metrics, Data Sources, and Players for Newcomer Healthcare**

	Data Points and Sources (linked)	Key Players
<p><b>Health Care</b></p>	<ul style="list-style-type: none"> <li>• <a href="#">Medicaid and CHIP enrollment and application figures</a></li> <li>• <a href="#">Cost and rates of health care coverage utilization</a></li> <li>• <a href="#">Health care performance baseline measures</a> (e.g., vaccination rates, rates of hospital admission)</li> </ul>	<ul style="list-style-type: none"> <li>• Medicaid Director</li> <li>• Directors of any Federally Qualified Health Centers (FQHCs)</li> <li>• Specialty clinic medical directors (e.g., Adult Refugee Health Clinic)</li> <li>• Local and private hospital community relations directors</li> <li>• Director, Office of Mental Health</li> <li>• MIECHV Specialist/Coordinator</li> <li>• Public health directors (state and local)</li> </ul>

## Social Services and Public Assistance

Many refugees rely heavily on public assistance programs in their initial months in the U.S. due to the limited funds provided to them through USRAP. While these benefits can prove essential for meeting basic needs and

providing a temporary financial safety net, they are not sufficient for long-term self-sufficiency. Certain families, particularly those with exceptional vulnerabilities, risk becoming dependent on these programs, which situates them at the mercy of budget cuts or reallocations.

To effectively address these challenges, resettlement actors must have access to current, consistent information on program participation trends, case outcomes, and relevant budget forecasts. This information helps make more visible the difficulties refugees may encounter in accessing public assistance programs, as well as the potential challenges government agencies face in administering and providing these services.

**Table 8: Key Metrics, Data Sources, and Players for Newcomer Social Services and Public Assistance**

	Data Points and Sources (linked)	Key Players
<b>Social Services and Public Assistance</b>	<ul style="list-style-type: none"> <li>• <a href="#">Temporary Assistance for Needy Families (TANF) caseload figures</a></li> <li>• <a href="#">Supplementary Nutrition Assistance Program (SNAP) participation rates</a></li> <li>• <a href="#">Supplemental Security Income (SSI) rates of use and enrollment</a></li> </ul>	<ul style="list-style-type: none"> <li>• TANF Director or Administrator (state); TANF Program Specialist (state and local)</li> <li>• SNAP Director or Administrator (state)</li> <li>• SNAP Program Specialist (state and local)</li> <li>• Women, Infants and Children (WIC) Supplemental Nutrition Program Director or Administrator (state)</li> <li>• WIC Program Specialist (state and local)</li> <li>• SSI Director or Administrator (state)</li> <li>• SSI Program Specialist (state and local)</li> <li>• Director, Division/Office of Energy Assistance</li> </ul>

## Housing

The importance of safe, affordable housing in the U.S. cannot be overstated for refugees and low-income families, especially those who face unique challenges in securing stable living conditions. Despite the availability of federal subsidies, the shortage of units, combined with steady rent increases over the past few decades, has created significant challenges for these vulnerable populations, making it difficult for them to find and maintain suitable housing.

Innovative solutions are urgently needed to address these ongoing challenges, and collaboration between federal, state, and local governments, as well as nonprofit organizations, is essential for developing and implementing effective strategies to bridge the housing affordability gap. By regularly sharing data about housing and homelessness trends during QCs, stakeholders may more effectively allocate resources and tailor strategies to meet the pressing needs that affect not only newcomers but, in fact, a broad segment of the U.S.

**Table 9: Key Metrics, Data Sources, and Players for Newcomer Housing**

	Data Points and Sources (linked)	Key Players
<b>Housing</b>	<ul style="list-style-type: none"> <li>• <a href="#">Public housing occupancy rates and resident characteristics</a></li> <li>• <a href="#">Continuum of Care (CoC) Homeless Assistance Inventory reports</a></li> <li>• <a href="#">Homelessness trends</a></li> <li>• <a href="#">Housing Choice Voucher (HCV) trends</a></li> <li>• <a href="#">Rental vacancy rates</a></li> </ul>	<ul style="list-style-type: none"> <li>• HCV/Section 8 Administrator</li> <li>• Housing Authority President/Director</li> <li>• Public Housing administrator</li> <li>• Housing developers</li> <li>• CoC Homeless Assistance Program Director</li> </ul>

## Data-Sharing Practices

As stewards or co-stewards of QCs, SRCs have significant discretion in what information is shared or solicited. There is no policy guidance prohibiting sharing data and information on varying integration systems, or on newcomer populations that do not come through the traditional resettlement program. However, given the time constraints and bandwidth of meeting participants, QC conveners must carefully consider how much data they would like to feature, as well as safety considerations surrounding the public or semi-public dissemination of information about vulnerable groups. QCs can, and often are, an iterative process, so conveners may try out several modalities of data delivery and information-sharing before identifying one that suits the local context.

**Table 10: Risks and Benefits of Various Data-Sharing Modalities in QCs**

Delivery Method	Pros	Cons
<b>Real-time presentation during meetings</b>	<ul style="list-style-type: none"> <li>• Opportunities to address clarifying questions</li> <li>• Maximum transparency</li> </ul>	<ul style="list-style-type: none"> <li>• Time-consuming</li> <li>• Information overload</li> </ul>
<b>Real-time share-outs from topic-based working groups</b>	<ul style="list-style-type: none"> <li>• Streamlined information delivery</li> <li>• Enhanced communication and coordination amongst stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Time-consuming</li> <li>• Increased facilitation demand</li> </ul>
<b>Pre-meeting reading material</b>	<ul style="list-style-type: none"> <li>• Allows time to digest information prior to QC discussions</li> <li>• Frees up time for discussion</li> <li>• Limited to no opportunities for in-person dialogue during QCs in the case of a full agenda</li> </ul>	<ul style="list-style-type: none"> <li>• Risk of public dissemination</li> <li>• Increased administrative burden to compile and widely disseminate</li> <li>• Risk of data misinterpretation</li> </ul>
<b>Post-meeting reading material</b>	<ul style="list-style-type: none"> <li>• Frees up time for discussion</li> <li>• Limited to no opportunities for in-person dialogue during QCs in the case of a full agenda</li> <li>• Provides context to discussions without overwhelming participants prior to QC</li> </ul>	<ul style="list-style-type: none"> <li>• Risk of public dissemination</li> <li>• Increased administrative burden to compile and widely disseminate</li> <li>• Risk of data misinterpretation</li> </ul>

The responsibility of collecting and sharing data can vary depending on QC roles and responsibilities. Data and information considered to be additional to the required information arrivals are communicated through a multitude of modalities, including but not limited to pre- and post-meeting reading material, real-time presentations, and share-outs from topically organized working groups. Based on the pros and cons mentioned above in Table 10, QC localities are encouraged to identify the practices that work best for their context to improve data sharing.

## Innovative Consultation Models

While the federal government requires certain standards for QCs, the format of a QC can and should vary across states and communities. A given QC format in one state may work incredibly well due to geographic or social factors, while that same format will hinder collaboration in another context with different realities. The following section highlights some best practices for improving the experience of stakeholders during QCs and better promoting positive outcomes for newcomers.<sup>8</sup>

### Supplemental Task Forces and Sub-Committees

An effective supplemental task forces is a specialized group focused on key areas of refugee resettlement, such as employment, public health, and community engagement. These task forces are designed to dedicate attention to specific challenges, allowing for a more focused and in-depth approach to problem-solving. By assembling experts and stakeholders with a shared interest in a particular aspect of resettlement, these task forces can develop targeted strategies and solutions that might be overlooked in broader consultations.

In practice, implementing these task forces requires thoughtful selection of participants who bring relevant expertise and perspectives. It's crucial that the task force is diverse enough to capture a wide range of insights while remaining focused and goal-oriented. Additionally, these task forces should be empowered to make recommendations to the larger QC space. The success of these groups hinges on effective collaboration, knowledge-sharing, and alignment with the broader resettlement program objectives. Their work can then be integrated back into the main consultation process, ensuring their insights inform the overall strategy.

### Promising Practice in Action: North Carolina Sub-Committees



North Carolina's implementation of sub-committee structures within their QCs, including for specific topics such as Employment Services, Outreach and Engagement, and Education and Youth Services, creates focused spaces for detailed discussions and collaborative problem-solving. These sub-committees not only enhance the depth of engagement but also empower stakeholders to take ownership of particular issues, driving targeted outcomes. This model demonstrates how breaking down broader consultations into specialized groups can create meaningful, actionable results.

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<sup>8</sup> For more reading on these innovative models and others, check out Switchboard's blog [Refugee Quarterly Consultations: Innovative Models for Empowering Community Connections](#).

## Prioritizing Diverse Stakeholders

Another key practice for successful QCs is the intentional prioritization of diverse stakeholders. Ensuring that a broad range of voices is represented in consultations enhances the richness and relevance of the discussions. This inclusivity helps QCs identify and address the unique needs and challenges facing different groups within the refugee community. Moreover, fostering a culture of inclusion within consultations encourages more robust and meaningful participation. When stakeholders feel that their voices are valued and their contributions can influence outcomes, they are more likely to engage and commit to the consultation process. This model not only improves the quality of discussions but also strengthens the overall community network supporting resettlement efforts.

The process of prioritizing diverse stakeholders involves proactive outreach and engagement efforts to address the diversity of knowledge and expertise in the room. QCs are meant to be highly active and collaborative working group meetings, but invitees who are less familiar with the complexities of resettlement may need more basic information than one QC can effectively offer. Strategies to overcome barriers to participation include providing virtual attendance options, offering multilingual support, and hosting additional “Refugee 101” sessions for those less familiar with resettlement. By making QCs accessible to a wider audience, programs benefit from a broader array of perspectives and expertise, ultimately leading to more effective resettlement strategies.

### Promising Practice in Action: Washington’s Extensive Stakeholder Network



Washington’s efforts to prioritize diverse stakeholders stand out—the state engages a network of over 200 organizations in its resettlement work. This extensive collaboration ensures that a broad spectrum of voices and expertise contribute to the resettlement process. Washington’s approach to QCs also includes specialized task forces, including the Ukrainian Welcoming Task Force, which provides consistent, focused spaces for those serving Ukrainian humanitarian parolees. These practices allow Washington to successfully foster authentic participation and tailor consultations to the needs of various communities, promoting a more inclusive and responsive resettlement framework.

## State and Local Partnership with Coalitions

Another innovative model for enhancing QCs is partnering with local coalitions and organizations outside the traditional resettlement framework. These partnerships can provide additional resources, expertise, and community connections that significantly expand the support available to newcomers. By leveraging the strengths of diverse local coalitions, the resettlement program can create a more holistic and integrated support network.

To implement this approach, it is important to identify and engage with organizations that share complementary goals. This could include groups focused on housing, employment, legal aid, or other areas crucial to successful resettlement. Establishing formal agreements or informal collaborations with these coalitions can enhance the capacity of resettlement programs to address complex challenges and provide more comprehensive support to refugees. Furthermore, these partnerships often lead to innovative solutions that might not emerge within the traditional resettlement framework. By working alongside a variety of local coalitions, programs can tap into new ideas, expand their reach, and foster a stronger, more resilient support



system. This model not only strengthens the consultation process but also enriches the overall resettlement experience for ORR-eligible and other populations.

## Promising Practice in Action: California's Refugee and Immigrant Forums



California boasts many examples of collaborative refugee resettlement efforts, including coalitions like the East Bay Refugee and Immigrant Forum (EBRIF), the San Diego Refugee Forum, and the Refugee Forum of Los Angeles. These forums provide open, welcoming spaces where service providers and ethnic community-based organizations (ECBOs) can connect with County Refugee Coordinators and access essential state and county data. In the case of EBRIF, for example, these meetings were initially dually counted as official QCs, but stakeholders later chose to hold separate sessions. This adjustment allowed for deeper discussions on a wider range of topics over multiple occasions, enhancing stakeholders' ability to address diverse newcomer needs. By fostering collaboration and making contact information accessible on the CDSS website, these coalitions play a prominent and crucial role in effective refugee resettlement.

## Meaningfully Engaging Individuals with Lived Experience

Resettlement experts, including newcomers themselves, have underscored the importance of integrating the voices of individuals with lived experience into all aspects of resettlement work. Meaningfully incorporating these perspectives into QCs goes beyond having newcomers share their stories; it must also involve leveraging their insights and contextual knowledge to inform strategic decision-making and service delivery. When inviting individuals with lived experience, it's crucial to focus on their current realities, not just the narratives of their migration, emphasizing how their experiences can contribute to effective consultations and shape community-level decisions.

To effectively engage individuals with lived experience, it is important to connect intentionally with ECBOs, local places of worship, and other community spaces where newcomers gather. Additionally, consider the accessibility of your consultations for stakeholders outside of day-to-day resettlement activities. Avoid overly technical language and jargon as much as possible without losing efficiency, and create an environment where contributions are both relevant and impactful, without turning QCs into basic informational sessions or spaces for airing personal grievances. Instead, focus on addressing broader trends that affect the entire community.

## QC Facilitation Strategies and Best Practices

Effective QCs require more than just the right stakeholders and a federally compliant agenda. They also demand thoughtful facilitation to ensure that meetings are engaging and productive. While it is crucial to meet the necessary compliance requirements, including by inviting key stakeholders and addressing required agenda items, there is ample flexibility to enhance the quality of the meetings. This section delves into practical strategies and best practices for facilitating QCs, with a focus on making the meetings more engaging and effective. By implementing these facilitation techniques, organizers can create more dynamic and participatory consultations that not only meet compliance standards but also foster meaningful discussions and actionable outcomes.



## Successful Outreach to Required and Supportive Stakeholders

Effective outreach to required and supportive stakeholders is not just a best practice—it's a critical component of successful resettlement efforts that align with federal and state guidelines. Outreach ensures that all relevant voices are included in QCs, directly impacting the planning and coordination of resettlement services. Federal government actors mandate outreach to and attendance from specific stakeholders (mentioned earlier, see Table 3), and failing to appropriately document these efforts can lead to compliance issues that may jeopardize federal funding. By prioritizing comprehensive and well-documented outreach using the strategies listed below,<sup>9</sup> RAs and SRCs can foster more inclusive consultations, leading to better outcomes for refugees and communities alike.

### Coordinate Formally and Consistently

According to policy from ORR, SRCs must lead or co-lead in QC meetings. But more traditional roles—rotating QC facilitation duties in partnership with local RAs—can lead to more successful rhythms for consultations. This ensures that QCs are aligned with state-level resettlement objectives, include SRCs' expertise centrally in the process, and prioritize local on-the-ground knowledge of RAs. In locations where multiple RAs operate, these agencies can support the SRC by coordinating closely with one another, helping to manage the responsibilities of planning, facilitating, and inviting attendees. A formal rotational leadership approach—where each agency takes the lead in supporting the SRC with one meeting per year, depending on how many RAs exist in a QC community—can further help distribute these tasks, ensuring effective collaboration while maintaining the SRC's required role.

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<sup>9</sup> Content in this section was adapted with permission from the International Rescue Committee's *Quarterly Consultation Guidance* resource.

## Schedule Well in Advance

Establishing the consultation schedule at the beginning or end of the year ensures that the meetings are on all participants' calendars well in advance. In areas with smaller resettlement programs, where only one agency may be present, scheduling meetings approximately four to six weeks in advance may provide local partners with adequate notice while allowing flexibility to accommodate the schedules and responsibilities of a smaller team.

## Invite Broadly

Maintaining a comprehensive list of invitees is essential, with regular reviews and updates throughout the year to reflect on participation and identify any additional stakeholders who should be included. When coordinating with other agencies, this list can be managed in a shared online location for easy access. In some cases, the SRC may distribute the invitations, whereas local RAs may be more effective in inviting other stakeholders, depending on existing relationships.

It is also important to consider the full range of local governance, including city and county elected officials and their staff, to ensure broad representation. For areas encompassing multiple small towns, representatives from all relevant towns should be invited to increase the likelihood of participation. It is important to note that, in smaller cities, local elected officials may be part-time or lack dedicated staff.

## Build and Rely on Relationships

Leveraging existing relationships to follow up with particular invitees is key to ensuring their attendance. When coordinating with other agencies, it may be helpful to divide the follow-up responsibilities based on who has the strongest relationship with each invitee. For new participants, an introductory meeting before adding them to the QC invitation list can be beneficial. After an election year, it is often necessary to rebuild the list of invitees, keeping in mind that newly elected officials may need time to hire their staff, potentially impacting attendance in the first quarter QC.



## Be Persistent

Consistent follow-up, via email and phone, is crucial to securing commitments from invitees (although, note that emails do not count as officially documented follow-up for non-attendees). Sending calendar invitations can also help track RSVPs. In some cases, it may be beneficial to explain that participation in these consultations is a federal requirement for RAs, providing context for the importance of the meetings.

## Find Win-Wins and Incentives

Identifying ways in which attending the QC aligns with the invitees' own goals can encourage participation. For example, some public community outreach staff may be required to attend a certain number of meetings and events, making their attendance at the consultation mutually beneficial. While attendance by state and federal officials may not meet specific requirements, their participation can provide valuable opportunities for local and county staff to connect with their counterparts. Inviting difficult-to-secure attendees to present during the consultation can also help ensure their participation. Additionally, providing lunch or other incentives can further encourage attendance.

## Incorporating Subject Matter Experts (SMEs)

Incorporating Subject Matter Experts (SMEs) into QCs can provide valuable insights that enhance the decision-making process. However, it is essential to ensure that the SMEs invited to these meetings are relevant to both the work at hand and the specific community context. When bringing in SMEs from different contexts, ensure that their work is replicable within the community, to avoid creating a sense of disconnect among QC participants. Focus on engaging SMEs in a way that allows for meaningful interaction rather than overwhelming participants with information. If the SME has extensive knowledge to share, consider providing supplementary materials like one-pagers or flyers, allowing them to focus their speaking time on actionable insights and interactive discussions.



## Cultivating a Consultative Space

As mentioned throughout this toolkit, a central challenge in optimizing QCs is that their high volume of stakeholders, along with the complexity of their integration areas, can make meetings feel more passively informational than actively consultative. While the earlier section on data-sharing practices touched on the pros and cons of various information-sharing modalities, there are still several other strategies to optimize your QC proceedings, including those in the graphic below and in the final sections of this toolkit.

**Figure 2: Facilitation Strategies to Promote Effective Consultation**

<p><b>•Strategically plan in order to make the most of QCs</b></p>	<p>•Send any key discussion questions in advance along with your agenda, allowing participants to prepare thoughtful, actionable responses</p>
	<p>•Elicit content to share or discuss during QCs in advance of the meetings, to screen for best ways to disseminate this information</p>
	<p>•Ask the question, "Could this meeting have been an email?" to ensure time in QCs is optimally spent</p>
<p><b>•Set clear and supportive meeting norms</b></p>	<p>○Set a shared goal of promoting the integration of newcomers through respectful dialogue and effective community coordination</p>
	<p>○Emphasize the importance of all QC stakeholders' presence and contributions, creating ample space for affirmation</p>
	<p>○Reduce feelings of competition and resource scarcity to focus instead on collaboration for mutual resource leverage</p>
<p><b>○Employ facilitation best practices to promote collaboration</b></p>	<p>○Plan for engagement from the beginning of a meeting to create an expectation of participation throughout</p>
	<p>○When asking questions, keep discussions targeted and focused while still leaving room for open-ended responses</p>
	<p>○If/when separating into breakout room or small groups, set clear expectations of what participants should be doing or discussing</p>

## Building in Capacity for Skillful QC Facilitation

Facilitating any meeting—especially one as dynamic and diversely-attended as a QC—is a unique skill that not everyone naturally possesses. It is essential to recognize that individual SRCs or RA directors do not need to take on the role of facilitator if it does not align with their strengths. For those who can contribute more effectively to other capacities, delegating facilitation to someone else within the office or at a local RA can be a practical solution. It is important, however, to ensure that the designated facilitator has this responsibility

clearly outlined within their job description to avoid overstressing their capacity. Planning and executing an effective QC requires preparation and effort, so this appointment should be made with careful consideration of the individual's workload and facilitation skills.

In certain cases, communities have found creative funding solutions to bring in specialized facilitation expertise. For instance, the [East Bay Refugee and Immigrant Forum](#) employs a coordinator whose role includes managing much of the administrative tasks associated with QCs. This position, funded by a combination of state resources and budget contributions from local RAs, helps to reduce the burden on state offices and newcomer service organizations. By sending invitations, managing outreach, taking detailed notes, and completing compliant follow-up actions, the coordinator allows other stakeholders to focus more on their contributions to the QC.



The choice between in-person and virtual meetings is yet another aspect of effective QC facilitation to consider. While the COVID-19 pandemic highlighted the success of virtual platforms like Zoom or Microsoft Teams for hosting QCs, this does not mean that virtual meetings are always the best option. Virtual meetings offer accessibility benefits but lack the dynamic interaction of in-person gatherings. In contrast, in-person meetings provide opportunities for side conversations and more organic connections, though they can be challenging to organize. Hybrid meetings, which combine in-person and virtual attendance, present their own logistical challenges and may create a divide between participants. QC communities across the U.S. vary in their practices, with many opting for a mix of virtual and in-person QCs throughout the year depending on what best suits their stakeholders. Regardless of your meeting format, it is essential to engage with QC participants in order to gauge their preferences: this can help determine the most effective format while also building more buy-in through collective decision-making.

### Context-Dependent Considerations for Consultation

Finding the most effective approach to QCs involves a degree of experimentation and adaptation. Each community has unique needs and dynamics, so it's important to explore various strategies and determine what resonates best with local stakeholders. Embrace the flexibility to try different methods and continuously refine your approach based on feedback and outcomes. For additional guidance, support, or technical assistance for improving the quality of your QCs, feel free to request [technical assistance](#) through Switchboard.

## Contributors to the Toolkit

The Migration Policy Institute's National Center on Immigrant Integration Policy is a crossroads for elected officials, grassroots and nonprofit leaders, educators, journalists, researchers, local service providers, state and local agency managers, and others who seek to understand and respond to the challenges and opportunities today's high rates of immigration create in local communities. Key services the Center provides include policy-focused research, policy design, leadership development, technical assistance and training for government officials and community leaders, and an electronic resource center on immigrant integration issues with a special focus on state and local policies and data.



The International Rescue Committee (IRC) helps people to survive, recover, and rebuild their lives. The IRC serves people whose lives have been upended by war, conflict, and natural disasters by responding to the world's worst humanitarian crises, including the conflict in Ukraine and the crisis in Afghanistan. We help to restore health, safety, education, economic wellbeing and power to people devastated by conflict and disaster. The mission of the IRC is to help people whose lives and livelihoods are shattered by conflict and disaster to survive, recover and gain control of their future. The IRC works to serve as a leader in the humanitarian field by implementing high-impact, cost-effective programs for people affected by crisis, and by using learning and experience to shape policy and practice.

## About Switchboard

Switchboard is a one-stop resource hub for refugee service providers in the United States. With the support of the Office of Refugee Resettlement (ORR), we offer tools and materials, learning opportunities, research, and technical assistance on resettlement-related topics. From employment, education, and health, to monitoring and evaluation, Switchboard's focus areas reflect real-world needs.

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