

Building Agency Support for an Immigration Legal Program

CLINIC: Center for Citizenship and Immigrant Communities

February 2, 2009

2:00 – 3:30 pm EST

*PowerPoint slides are available at:

<http://www.cliniclegal.org/Trainings/webinars/BuildingAgencySupportWebinar020209.pdf>

*****Please call 484-589-1010 and enter the access code 263-034-891 for audio******

CLINIC Presenters

- Jeff Chenoweth, Assistant Director,
Capacity Building Section
- Leya Speasmaker, Field Support Coordinator,
Capacity Building Section

CLINIC's Capacity Building Goals

- Expand the number of charitable legal immigration programs
- Increase services
- Improve services

CLINIC's Capacity Building Activities

- Board of Immigration Appeals (BIA) agency recognition & staff accreditation
- Immigration Program Management training
- Management webinars
- Consultations with Field Support Coordinators
- On-site visits/assessments

Capacity Building Activities, cont'd.

- Project management
- Flow through funding
- Link members & subscribers to CLINIC services
- Prepare programs for significant immigration changes

Webinar's Goal

- To recruit more leaders and financial donors in order to grow and sustain charitable legal immigration services for the challenges of today and a new environment tomorrow

Challenges in Capacity Building Training

- Wide variation in capacity levels
- New and long-standing programs
- Regional differences
- Size
- Different levels of agency support

Poll



Please answer the question with the answer that best applies to you.

Why Agency Support is Important: Leadership Makes a Difference

- Connects immigration program to the overall mission
- Keeps board of directors informed and supportive
- Provides strategic planning

Why Agency Support is Important, cont'd.

- Approves necessary changes to expand and improve services
- Coordinates internal and external collaboration (resources)
- Encourages staff and improves morale
- Evaluates quality and quantity of services

Why Agency Support is Important, cont'd.

- Educates the community
- Cultivates funders and key stakeholders
- Protects program from external threats

Questions to Consider

- How can I educate the agency's executive director and board about the legal needs of immigrants and the value of our program's services?
- What information does the agency's leadership need to be more committed to legal immigration services?
- How can the program's list of services be justified if ever questioned due to threat of budget cuts?
- How can the immigration program receive agency help in resource development?

Questions, cont'd.

- How can our legal services be better profiled in agency publications and local news outlets?
- Is the agency planning effectively for the potential of legalization happening?
- Can the program afford to add a staff attorney for the first time?
- How should client fees be calculated given the program's budget?
- Is a program sub-office in a neighboring community necessary to serve more clients effectively? If yes, how can it be supported?

Poll



Please answer the question with the answer that best applies to you.

Case Study

Immigration Services Extraordinaire (ISE) provides legal services to low-income immigrants but remains an unfamiliar, if not obscure, program in the agency. Other agency staff, including management, wonder exactly what all the immigrants in the waiting room want and get from ISE. ISE has no external grants and relies solely on agency funds. ISE's waiting list for appointments is getting larger and longer, overwhelming ISE's 2 case workers. The community has changed in the years since ISE was founded, and ISE staff finds predicting client needs challenging.

ISE's program director has had one meeting with agency leadership about the potential for legalization passing in Congress but no agency-wide plan has been developed to serve the estimated 35,000 undocumented immigrants in the community. ISE is but one of two charitable immigration programs within a 100 mile radius.

There are two potential funders that could support the cost of an outreach worker/immigration specialist. Yet, the agency doesn't offer the ISE program director any assistance in writing grant proposals and the executive director isn't sure she wants to use these potential funders for immigration legal services.

How Can a Business Plan be Used to Engage Leadership Support?

- Provides structure to complex scenarios
- Requires clear answers to consequential questions
- Produces a document that can be reviewed, endorsed and implemented
- Serves as a benchmark for evaluation
- Guides planning for changes
- Shows funders and board that a program has a plan for requested funds

Business Plan Outline

I. Executive Summary of Plan (Background)

II. Community Analysis (Market Analysis)

III. Tools and Timing (Market Strategy)

A. Services

B. Operations

C. Support

D. Timeline

V. Service Delivery

VI. Finances

(See Immigration Program Management Manual, pages 14 – 22)

Executive Summary of Plan (Background)

Mission Fit:

- Immigration legal services match the mission of our organization because...

Rationale:

- We are the best organization in the area to provide these services because...

Community Analysis (Market Analysis)

Service Description:

- Brief description of basic service and client base

Client Profile/Needs Assessment:

- Characteristics of clients and their needs
(See Resource Page at end of PowerPoint)

Problems/Obstacles/Opportunities:

- Main issues, positive spin

Other Providers/Notarios:

- Are others providing these services? Is there collaboration? How are clients protected against notarios?

Tools and Timing (Market Strategy)

- Services
- Operations
- Support
- Timeline

Current and Future Services

- List of services program provides
- Outcomes of current service provision
- Clear plan for service provision expansion
- Clearly outlined fee schedule, based on research
- Knowledge of staff's qualifications, knowledge, interests, expertise
- Awareness of professional development needs

Operations

- Personnel information: names, qualifications, areas of expertise
- Rationale for need for additional staff
- Plan for legal supervision of staff
- Plan for quality control
- Plan for use of volunteers

Support

- List of resources for immigration law questions
- Plan and procedures for partnerships with immigration attorneys
- A list of community organizations, services they offer, and contact information
- Proof of or plans to collaborate with other organizations

Timeline

- Written record of steps taken to implement program and services
- Staff work plans with objectives and timelines
- Written record of future steps, responsible parties, and timing
- Clear objectives and rationale for each step

Service Delivery

Procedures

- Intake procedure
- Case selection and assignment
- Case management procedures
- Established policy for fee schedule
- Procedures for case closures
- Procedures to track outcomes and client satisfaction

Financial Sustainability

- Fundraising goals and procedures
- Draft LOIs, proposals, statistics, outcomes
- Analysis of case mix and trends
- Fee revenue projections based on case mix
- Procedures for tracking revenue & expenses

Cost of Services

- Pie chart of expenses
- Analysis of auxiliary costs (office supplies, communication, etc.)
- Cost of professional development
- Analysis of cost of expanding

Case Study Revisited

Immigration Services Extraordinaire (ISE) provides legal services to low-income immigrants but remains an unfamiliar, if not obscure, program in the agency. Other agency staff, including management, wonder exactly what all the immigrants in the waiting room want and get from ISE. **(background)** ISE has no external grants and relies solely on agency funds. **(financial sustainability)** ISE's waiting list for appointments is getting larger and longer, overwhelming ISE's 2 case workers. **(case selection, case mix)** The community has changed in the years since ISE was founded, and ISE staff finds predicting client needs challenging. **(community analysis, tools and timing)**

ISE's program director has had one meeting with agency leadership about the potential for legalization passing in Congress but no agency-wide plan has been developed to serve the estimated 35,000 undocumented immigrants in the community. **(background, tools and timing)** ISE is but one of two charitable immigration programs within a 100 mile radius. **(community analysis)**

There are two potential funders that could support the cost of an outreach worker/immigration specialist. Yet, the agency doesn't offer the ISE program director any assistance in writing grant proposals and the executive director isn't sure she wants to use these potential funders for immigration legal services. **(tools and timing, financial sustainability, background)**

Take-Away Points

- Information is a friend
- Create and update the business plan
- Seek help from outside sources
- Get ideas from others
- Advocate for the program

How to Get Started

- Set a goal
- Identify outcomes
- Create a timeline
- Target appropriate people
- Seek a funder

Poll



Please answer the question with the answer that best applies to you.

Help for Building Agency Support

- CLINIC's Immigration Program Management Training and Schedule
(<http://www.cliniclegal.org/Trainings/2009TrngChart-12-11-08.pdf>)
- CLINIC's Management Issues Webinars
- CLINIC's *Immigration Program Management Manual*
(<http://www.cliniclegal.org/Legalization/managementmanual.html>)
- Contact Field Support Coordinator with program-specific questions and requests

Other CLINIC Resources

- CLINIC's Survey of Member Agency data
- CLINIC's *Starting an Immigration Program*
- CLINIC's *Preparing for Legalization*

Further Resources

- CARA report on the undocumented by diocese: <http://cara.georgetown.edu/pubs/TCR.html>
- Grant Makers Concerned for Immigrants and Refugees (GCIR) reports: www.gcir.org
- Pew Hispanic Center: <http://pewhispanic.org/publications/>
- Migration Policy Institute: www.migrationpolicy.org
- Faith-based and Community Initiatives Tool Kit: <http://www.census.gov/field/www/faith/>
- American Community Survey: <http://www.census.gov/acs/www/index.html>

Other Information

- Certificates will be emailed
- Webinar is available at both www.cliniclegal.org and www.immigrationadvocates.org
- After February 17, 2009, the PowerPoint will be available at: www.cliniclegal.org.

Questions or Further Information

Jeff Chenoweth:

jchenoweth@cliniclegal.org

Leya Speasmaker:

lspeasmaker@cliniclegal.org