

Space, Equipment, and Tools

CLINIC

**Center for Citizenship and
Immigrant Communities**

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To access audio, please dial 484-589-1010 a
personal access code.

CLINIC Presenter

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Capacity Building Section

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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

CLINIC Resources

Immigration Management Program manual

<http://www.cliniclegal.org/resources/managing-immigration-program-steps-creating-and-increasing-legal-capacity>

Webinar's Goal

- To provide information about and rationale behind the space and tools CLINIC recommends using in order to operate an immigration legal services program

Main Categories

- Office Space
- Office Equipment
- Computer Equipment and Software
- Law Library
- Insurance

Rationale

- Confidentiality
- Secure client property
- Accurate and timely legal service provision
- Established and enforced office procedures
- Reliable fee collection
- Outcome tracking
- Legal competency
- Liability coverage

Case Study

Immigration Services Extraordinaire (ISE) first opened in 1987, with one employee. Because the program was so small, the lone case worker stayed organized by using her own system – collecting fees when the client could afford it, keeping client fees in her desk until she gathered several (in order to save on postage), reminding herself to file petitions by using post-it notes and a calendar, and taking case files home with her so she could finish up after dinner. She had a large office, as she was working alone, and saw all clients there.

Now, ISE employs 5 people: an office manager, 3 BIA accredited case workers, and a paralegal. A few volunteers help out during the week with clerical work. The old operating systems from 1987 remain in place as everyone has a large caseload and not enough free time to plan new policies and procedures. Three people now share one office, which gets loud when one person is on the phone with a client, one with USCIS, and one is meeting with a client. When they have legal questions, they use their copy of the INA from 2006 because they don't have the money to buy the newest version.

Recently, one of the caseworkers was informed that her client, a DV survivor, was denied immigration benefits because of missed application deadlines. No one can figure out where the error happened since the caseworker throws away all the post-it note date reminders once the month passes. Additionally, the case file for this particular client has gone missing from the desk where all the files are kept.

Office Space

Staff workspace

- separate offices with doors
- designated room for appointments

Waiting room

- clean, neat, welcoming
- signage in appropriate languages

Office Equipment

- Locked filing cabinets
- Locked Safe
- Shredder

Computer Equipment

Laptops

Personal Digital Assistants (PDAs)

Removable disks/drives (USB)

Public internet access

Cell phones

Software: Case Management Technology

- Software provides a path for staff to follow
- Software provides the person managing office workflow an easy way to check if benchmarks are being met
- Software with case management systems provide reports

Two Types of Software

- Home-computer based
 - save all data to your own computer
- Web-based
 - data is saved on a remote server
 - easier remote access
 - needs security verification

Considerations when Choosing Software

- Features of the system
- Ease of Use
- Training
- Technical Support
- E-filing and Remote Access
- Cost

Case Software Ideas

- See Page 31 in IMP manual

Law Library

- Immigration law
- General treatises on immigration law
- Subject-specific books
- Periodicals

Law Library cont'd.

- Many materials available on-line.
- Good to have current hard copies of:
 - Immigration and Nationality Act (INA)
 - Volume 8 of the Code of Federal Regulations (8 CFR)
(Available for purchase at <http://bookstore.gpo.gov>)
- View CLINIC's comprehensive list on page 29 of the IMP manual.

Insurance

- Attorneys and BIA accredited reps need to have legal malpractice insurance.
- Boards of directors and non-legal staff should have errors and omissions insurance.
- Employees and Board of directors should have Directors and Officers (D & O) insurance.

Why have insurance?

Possible lawsuits:

- Asset mismanagement
- Legal malpractice
- Not providing services when there was no reasonable reason not to.
- Wrongful termination of an employee.
- Discrimination against an employee or client.
- Harassment of employees or clients.

Case Study, Revisited

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Take-Away Points

- Help employees to help others
- Look and act professional
- Create and reevaluate office policy and procedures
- Protect your program and agency
- Seek help from outside sources
- Get ideas from other similar programs

How to Get Started

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

Programmatic Help

- CLINIC's Immigration Program Management Training and Schedule
<http://www.cliniclegal.org/training-descriptions>
- CLINIC's Management Issues Webinars
<http://www.cliniclegal.org/calendar>
- CLINIC's *Immigration Program Management Manual*
<http://www.cliniclegal.org/resources/immigration-management-manual-managing-immigration-program>)
- CLINIC's *Preparing for Legalization*
<http://www.cliniclegal.org/resources/preparing-legalization-0>

Further Resources

- Immigration Advocates Network (www.immigrationadvocates.org)

Technology Support Websites:

- www.techsoup.org
- www.istech.org/techlibrary
- <http://tig.isc.gov/>

Other Information

- Certificates will be emailed
- Webinar is available at both www.cliniclegal.org and www.immigrationadvocates.org
- The PowerPoint will be available at: www.cliniclegal.org.

Additional Questions?

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