



Mentorship Toolkit for Non-Attorneys Aspiring to Become Accredited Representatives

Engaging in a mentorship initiative is an effective way to learn how to practice immigration law, pivot into a new area of law, or obtain hands-on experience as an aspiring accredited representative. This toolkit provides information and resources for attorneys and accredited representatives who will be mentoring persons aiming to be accredited representatives, as well as resources for those seeking mentorship.

There are countless benefits to observing practitioners engaged in the provision of legal services. Being a mentor has other benefits, such as providing an opportunity to reflect on their internal processes and service delivery models. The following resources have been developed to help create a positive and effective mentorship experience for both mentees and mentors.

Toolkit Contents:

- Guidelines for Mentees: Obtaining Hands-on Experience (Shadowing) in Immigration Law for DOJ Partial Accreditation
- Tips for Mentors: Providing Remote Shadowing for Staff Preparing for Partial Accreditation
- Roles and Responsibilities of Mentors
- Sample Mentorship Schedule
- Sample Mentorship Agreement - Courtesy of Catholic Multicultural Center
- Sample Letter of Support for Accreditation

To be eligible to apply for accreditation, non-attorneys must demonstrate that they have broad knowledge and adequate experience in immigration law and procedure. There are many ways to gain the requisite experience in immigration law. Aspiring accredited representatives have gained this by observing and working under the supervision of in-house attorneys or accredited representatives. Others have worked as paralegals at law firms or volunteered at large-scale immigration legal services workshops together with authorized practitioners. Aspiring accredited representatives working or volunteering at organizations with no immigration attorneys or accredited representatives on staff can gain experience in immigration law by working with authorized practitioners who have agreed to serve as mentors.



Guidelines for Mentees: Obtaining Hands-On Experience (Shadowing) in Immigration Law for DOJ Partial Accreditation

Laying the Groundwork

Identify and contact your mentor to establish the mentor-mentee relationship. The mentor should be an authorized provider (DOJ accredited representative or immigration attorney). Work with your mentor to establish a timeline, schedule, and expectations for both of you. Let the mentor know when you are hoping to file your accreditation application and how much experience you would like to gain. Discuss the types of cases and processes you will be working on and the ability of the mentor to provide a letter of recommendation for your accreditation application.

Determine what is feasible given the time, resources, and availability of you and your mentor.

Getting Started

At the outset, the mentor should give you an overview of the organization or program you will be working for, including the clientele and services provided. You should also complete any key paperwork needed for your shadowing, such as a confidentiality agreement or other documents. In addition, you should review and discuss the following:

- The organization's website and any other information about their services, such as annual reports;
- The Case Management Policies and Procedures Manual for the immigration program; and
- The client screening/intake sheet, client agreement, and any other key forms used.

In an organization with multiple staff, you may work with or shadow more than one authorized staff person as needed to gain a wide variety of experience. These other, authorized staff members may provide a letter of recommendation for your accreditation application as well.

Duration

Aim for at least 40 hours of hands-on experience working on immigration cases under the supervision of the authorized provider (mentor). If possible, the hands-on experience should continue up to and after filing the accreditation application. (It may be on a more limited basis after the initial, 40 hour training period). The 40 hours may take place all at once (over 5 days) or, more often, it may be spread out over a longer period of time.

Types of Hands-On Experience

Try to get experience with a variety of immigration applications that would be handled by a charitable immigration program. Key applications are the I-130, I-485, and N-400. In addition to these three most important ones, aim to get experience/exposure to at least seven others, so you have at least 10 on your resume. Some examples of other applications are the I-90; I-821D; I-912; N-600; I-864; I-765; and I-821. This experience/exposure could mean completing an application yourself under the supervision of the mentor, or shadowing the mentor while they complete the application and explain it to you.

Aim to get experience with a variety of immigration processes in the life of a case, such as:

- Initial screening for eligibility;
- Intake (opening a case);
- Document gathering;
- Application completion and packaging for submission;
- Case management and follow up such as handling Requests for Evidence (RFEs);
- Reminding clients of appointments for fingerprinting or interview;
- Accompanying a client to the interview and
- Closing a case.

This experience could mean doing the work yourself under supervision or it could mean shadowing and watching the mentor while they are doing it. The mentor may explain the work while they are doing it or discuss it with you later. The mentor should provide sufficient time and opportunities for you to ask questions about the work.

Formal Training

Prior to shadowing, complete the CLINIC course, Comprehensive Overview of Immigration Law (COIL), or a similar broad overview course on the fundamentals of immigration law, procedure, and practice. Take additional trainings on a variety of topics prior to or during the shadowing, such as webinars available here:

- <https://cliniclegal.org/training/calendar>
- <https://cliniclegal.org/training/archive>

Make sure you are signed up to receive CLINIC's weekly emails with upcoming trainings (<https://cliniclegal.org/email>) as well as the Advocate Resource Center of the Immigration Advocates Network (<https://www.immigrationadvocates.org/nonprofit/>). Formal training should be taken on an ongoing basis.

Other Helpful Trainings:

- If you have an opportunity to take CLINIC's Immigration Practice Skills Course, this is another good training to help you prepare for accreditation, as well as our webinar, All About DOJ Recognition and Accreditation.
- Also, if you are starting a new immigration program and applying for initial DOJ R&A, another recommended training is CLINIC's e-learning course on Program Management, Case Management, and Ethics.

- You should also consider the training on Case Management Techniques and Strategies and/or reviewing the [Case Management Toolkit](#) resources.

Working Remotely

While in-person experience is best, a remote arrangement using Zoom or other technology is acceptable if in-person is not possible (and the mentor/supervisor is comfortable with it).

Record-Keeping

For your own reference, keep a record of the hands-on experience that includes the amount of time you spent, the types of activities you did, and the types of applications you worked on.

These details will be helpful to have for your resume and for the letters of recommendation.

Letter of Recommendation

After you have completed a sufficient amount of hands-on experience, the accredited representative or attorney mentor will need to provide you with a letter of recommendation describing your knowledge and experience in immigration law, as well as their own background and qualifications to make the recommendation.

Sample Schedule for 40 Hours of Hands-On Experience

Below is a sample schedule for 40 hours of hands-on experience. This is only a sample offered to be helpful, and is not intended to create strict requirements, as every situation is different and requires flexibility. Often the 40 hours are spread out over several months. Sometimes, it is not possible to obtain 40 hours.

Day 1

- Orientation meeting with mentor/supervisor and introductions to other program staff.
- Review case management forms, policies, and procedures, as well as the case management software system.
- Complete any necessary paperwork such as a confidentiality agreement.
- Begin observing client meetings (any kind).
- Receive training on client eligibility screening/intake.
- Review several case files for different types of applications and learn about the case file structure and procedures for record keeping.

Day 2

- Conduct screening/intake sessions under supervision and/or shadow and watch while staff is doing it. Take notes and have an opportunity for questions and discussion afterwards.
- Continue observing client meetings (any kind).
- Learn how to open a case and how client fees are collected.
- Obtain training on and experience handling key forms: I-130, I-485, N-400, etc.

Day 3

- Continue training/experience with key forms plus any additional ones.
- Continue observing client meetings (any kind).
- Sit in on any staff meetings and/or group supervision sessions with staff.

Day 4

- Continue training/experience with key forms plus any additional ones.
- Get experience with document gathering for a case and preparing an application packet for submission via regular mail and online.
- Accompany staff to a client interview, if possible.
- Accompany a client to a fingerprinting appointment, if possible.
- Assist a client to find case status information on USCIS website.

Day 5

- Continue training/experience with various immigration forms and processes, as outlined above.
- Learn how to respond to an RFE and close a case.
- Assist with a naturalization group processing workshop.
- Meet with mentor to discuss next steps, including letter of recommendation and the possibility of continuing shadowing until accreditation application is approved.



Tips for Mentors: Providing Remote Shadowing for Staff Preparing for Partial Accreditation

- The mentor should have the mentee sign a confidentiality agreement similar to what would be used for staff and volunteers.
- Mentees may need to review policies and procedures for the mentor's organization.
- To observe intakes and consultations, can the mentee join as a third party on a phone call or videoconference? If so, mentors should get permission from clients in advance.
- Schedule meetings via phone or videoconference with mentees to review cases and discuss eligibility and other case information.
- To review completed applications, there are two options. If the mentor has electronic case files stored in a case management database, the mentor can provide access to only those case files. Otherwise, the mentor can scan the case file if it is not already saved electronically and send it to the mentee to review.
- Assisting with applications and or following up with cases may require mentees to have access to the immigration program's case management database. Some databases, such as Equifax, can limit individual access to certain cases. Mentees could then work directly with clients to complete applications or requests for evidence via phone or videoconference. Mentors would then review the completed applications with mentees and meet with the client to go over the information before filing.
- Recommended technology and tools would include:
 - A case management database, preferably with electronic files stored and limited case access for certain individuals;
 - Video conferencing software such as Microsoft Teams, Google Meet, or Zoom;
 - Private lines with 3-way calling capability; and
 - Secure email.



Roles and Responsibilities of Mentors

Why Mentoring?

The mentor's role is to promote the growth and development of the case manager so they can improve legal skills, case management, and client relationships. Mentors are critical supports in guiding new case managers to enhance their work and ability to represent clients as DOJ accredited representatives. Having a mentor can be invaluable for new immigration practitioners. Here are some key reasons why having a mentor is important:

- **Guidance and Support:** Immigration law is a complex and constantly evolving field. A mentor can provide guidance and support to navigate the intricacies of immigration law practice. They can help new practitioners understand the legal processes, interpret regulations, and provide insights based on their own experiences. All the mentees will receive legal immigration training from CLINIC, but having a mentor will allow them to put their knowledge into practice and learn how to best advise their clients.
- **Practical Knowledge and Skills:** While CLINIC trainings provide a strong foundation, practical knowledge and skills are often gained through real-world experience. A mentor can offer practical tips and advice based on their years of experience in handling immigration cases. They can share best practices, strategies, and techniques that can accelerate the learning curve for new practitioners.
- **Networking Opportunities:** A mentor who has been practicing immigration law and been part of a successful nonprofit immigration program for a long time likely has an extensive network of contacts in the field. This network can provide valuable opportunities for new practitioners, such as referrals, introductions to key stakeholders, and access to resources that can enhance their practice.
- **Professional Development:** A mentor can play a crucial role in the professional development of new immigration practitioners. They can provide feedback on legal research, writing, and courtroom advocacy. They can also help identify areas for improvement and suggest ways to enhance professional growth. A mentor's guidance can contribute to the overall development of a well-rounded DOJ accredited representative.
- **Ethical Considerations:** Immigration law practice involves ethical considerations that apply to all practitioners, including DOJ representatives. A mentor can provide insights into ethical dilemmas that arise in immigration practice and help new practitioners navigate these situations with integrity and professionalism.
- **Emotional Support:** Many DOJ accredited representatives come from the communities that are being served, and in many instances, understand the complicated issues families face when obtaining legal representation. A mentor can provide emotional support and serve as a sounding board for new practitioners,

- helping them manage stress, maintain work-life balance, and develop resilience. Overall, a mentor can offer valuable guidance, support, and wisdom to new immigration practitioners. Their expertise, experience, and perspective can shape the professional trajectory of a new DOJ representative, accelerating their learning, boosting their confidence, and facilitating their success in the field of immigration law.

When Is Mentoring Required?

The ideal time to set up a mentorship for a new immigration practitioner is as early as possible in their career journey. It is beneficial to establish a mentorship relationship early in a new immigration practitioner's career. This allows them to receive guidance and support right from the start, helping them lay a solid foundation for their practice. The mentor can provide insights into the field, assist in case strategy, and offer advice on building essential skills.

New immigration practitioners may encounter complex cases or challenging situations early in their careers. Having a mentor during these times can provide critical guidance and support, ensuring that the practitioner can approach the case or situation with confidence and expertise. A mentor can share strategies, offer alternative perspectives, and help the practitioner navigate any ethical dilemmas that may arise.

Ideally, the mentorship should be an ongoing relationship that extends throughout the new immigration practitioner's career. As the practitioner gains experience and faces new challenges, the mentor can continue to provide guidance, offer insights on advanced legal issues, and assist in professional development.

What Are the Minimum Requirements for Mentors?

A mentor should have substantial experience practicing immigration law. They should have a solid understanding of immigration processes, regulations, and procedures, particularly in the nonprofit field.

A mentor should have the expertise in the immigration subjects covered in most nonprofit environments, including family immigration, removal representation, services for survivors of crime, and naturalization.

Mentors should uphold high ethical standards in their practice. Immigration law often involves vulnerable individuals and complex legal issues, so it is crucial that mentors prioritize integrity, professionalism, and ethical considerations.

A mentor should be willing and available to provide guidance and support to the mentee. They should be accessible and responsive to inquiries, questions, and concerns. Availability can be in the form of regular meetings, phone calls, emails, or even virtual communication platforms, depending on the mentee's and mentor's preferences and schedules.

Effective communication is essential for a mentorship relationship. Mentors should be able to explain complex legal concepts clearly and concisely and provide constructive feedback on the mentee's work. A mentor should possess strong teaching skills, helping the mentee understand legal principles, strategies, and practical considerations.

Mentors should be supportive, encouraging, and willing to invest time and effort into the mentee's

growth and development. A positive attitude can create a nurturing and motivating environment, allowing the mentee to feel comfortable seeking guidance, and learning from the mentor's experiences.



Sample Schedule for 40 Hours of Hands-On Experience: Tool for Mentors

Below is a sample schedule for 40 hours of hands-on experience completed in one week (five days). This is only a sample offered to be helpful, and is not intended to create strict requirements, as every situation is different and requires flexibility. Often the 40 hours are spread out over several months. Sometimes, it is not possible to obtain 40 hours.

Day 1

- Orientation meeting with mentee and introductions to other program staff.
- Review case management forms, policies, and procedures, as well as the case management software system.
- Mentee reviews organization's website and any other helpful information about services.
- Complete any necessary paperwork such as a confidentiality agreement.
- Mentee begins observing client meetings (any kind).
- Provide training on client eligibility screening/intake.
- Mentee reviews several case files for different types of applications and learns about the case file structure and procedures for record keeping.

Day 2

- Mentee conducts screening/intake sessions under supervision and/or shadows and watches while staff is doing it. Mentee takes notes and has an opportunity for questions and discussion with mentor afterwards.
- Mentee continues observing client meetings (any kind).
- Mentee learns how to open a case and how client fees are collected.
- Provide mentee with training on and experience handling key forms: I-130, I-485, N-400, etc.

Day 3

- Mentee continues training/experience with key forms plus any additional ones.
- Mentee continues observing client meetings (any kind).
- Mentee sits in on any staff meetings and/or group supervision sessions with staff.

Day 4

- Mentee continues training/experience with key forms plus any additional ones.
- Mentee gets experience with document gathering for a case and preparing an application packet for submission via regular mail and online.
- Mentee accompanies staff to a client interview, if possible.
- Mentee accompanies a client to a fingerprinting appointment, if possible.
- Mentee assists a client to find case status information on USCIS website.

Day 5

- Mentee continues training/experience with various immigration forms and processes, as outlined above.
- Mentee learns how to respond to an RFE and close a case.
- Mentee assists with a naturalization group processing workshop.
- Meeting with mentee to discuss next steps, including letter of recommendation and the possibility of continuing shadowing until accreditation application is approved.

Courtesy of the Catholic Multicultural Center

MENTORSHIP AGREEMENT

This agreement is between Mentor, _____ employed with Agency, _____
_____ and Mentee, _____.

OVERVIEW OF MENTORSHIP PROGRAM

This Mentorship program is a part of the Wisconsin Capacity Building Initiative (WCBI) and is designed to give Mentees who are working towards partial DOJ Accreditation hands-on experience working with a Mentor Attorney or DOJ Accredited Representative on a variety of immigration processes from the screening and intake phase to filing and pre-adjudication and post-adjudication phases. The immigration processes may include but are not limited to completion of the following USCIS forms with supporting evidence: I-90, I-82, I-821D, I-912, I-765, I-130, I-485, N-400, and N-600.

DURATION OF MENTORSHIP

The Mentorship program will span a minimum of _____ hours. The Mentorship end date is _____ but may continue informally beyond this date as needed.

MENTOR AGREES TO:

- Review expectations, establish learning outcomes, and devise a mutually agreed upon schedule of activities with Mentee prior to commencement of the Mentorship program.
- Provide Mentee with the opportunity to gain hands-on experience processing a variety of immigration applications.
- Provide Mentee with feedback and support aimed at developing Mentee's skills in attaining their DOJ partial accreditation.
- Arrange for Mentee to shadow or observe other staff within the Mentor Agency's Immigration Legal Services Program when appropriate.

MENTEE AGREES TO:

- Complete CLINIC's COIL (Comprehensive Overview of Immigration Law) course prior to commencement of initial mentoring.
- Comply with all of the Mentor Agency's policies and procedures related to volunteers.
- Maintain strict confidentiality of all client information and details learned during mentoring.
- Apprise Mentor of important dates with sufficient time to give Mentor the ability to ensure timely compliance with Mentee's deadlines.
- Participate in mentoring tasks and assignments both remotely and in-person.

PROPOSED MENTORING SCHEDULE:

Mentor and Mentee agree to meet in accordance with the following schedule: _____
_____.

This Agreement sets forth objectives that the Mentor and Mentee commit to working on together. Both agree to follow the guidelines set forth and make a good faith effort to resolve any issues that may arise between them.

Mentor Signature & Date

Mentee Signature & Date



**SAMPLE LETTER OF RECOMMENDATION FOR PARTIAL ACCREDITATION
(Ideally from attorney or fully accredited representative)**

The information underlined does not necessarily need to be included but can be helpful to assist in OLAP’s Character and Fitness Determination. All details should be personalized.

[On letterhead of writer’s organization] [Date]

Recognition and Accreditation Program Coordinator Office of Legal Access Programs
Office of Policy
Executive Office for Immigration Review 5107 Leesburg Pike, Suite 2400
Falls Church, VA 22041

RE: Recommendation for Partial Accreditation of Susan Sanchez

Dear Recognition and Accreditation Program Coordinator:

Paragraph One - [general summary of author’s background and experience]

I am pleased to write this letter of recommendation for partial accreditation of Susan Sanchez. I am a licensed immigration attorney with 10 years of experience practicing immigration law at Adelante, a non-profit agency in Wheaton, IL. I am admitted to the Bar in Illinois. My practice focuses on family-based immigration, deportation and removal hearings, VAWA, and asylum.

Paragraph Two- [how the author became familiar with the applicant’s immigration work]

I have known Ms. Sanchez since [date], when she came to work for Any Church. Since that time, she has worked as an Immigration Advocate for that office. We have attended many meetings and immigration trainings together. I am familiar with her work as she has provided interpretation services for a number of my clients and has helped coordinate citizenship workshops with various non-profits in the area.

Paragraph Three – [details of the applicant’s qualifications and experience].

She has attended numerous trainings on immigration law and has gained extensive experience assisting immigrants and refugees with immigration applications [add specific examples such as the applicant’s work on x y z case types, her ability to interview or build rapport clients, etc.]. I personally worked alongside Ms. Sanchez on various cases and can attest to her ability to offer immigration legal services. She is an excellent immigration worker and is well-respected in the community. I strongly believe she has the necessary knowledge and experience to warrant receiving partial accreditation from the Department of Justice.

I am available to support the Any Church office and Ms. Sanchez with immigration questions and strategy. I am available in person, by phone, or by email on a pro bono basis.

I strongly recommend Ms. Sanchez for partial accreditation from the Department of Justice. Please

contact me at [contact information] if you have any questions.

Sincerely,

NAME, Esq.