


CATHOLIC LEGAL IMMIGRATION NETWORK, INC.



How to Plan and Implement a “Mega-Workshop”

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Presenters

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Goals

- To promote the effective use of “mega-workshops” to serve immigrants on a large scale
- To use mega workshops as a versatile tool for different immigration benefits



Objectives

- To see an increase in CLINIC affiliates using the workshop model and the mega model where it is needed
- To draw trainees/volunteers to a Nov. 16 mega workshop training in L.A. & Nov. 17 mega naturalization workshop



Training and Workshop in L.A.

- November 16 – mega workshop training
- CLINIC, NALEO Educ. Fund, C.C. L.A.
- Attended by L.A. nonprofit staff and others from the U.S.
- November 17 – mega workshop event
- Trainees present to serve applicants
- Capacity to serve over 250 applicants
- Registration for training to open soon



Webinar Overview

- Resources
- What is a Mega Workshop?
- Planning for a Mega Workshop
- Media Considerations
- Stages of the Workshop Event
- NALEO's Experiences
- Future Considerations & Best Practices



Resources

- CLINIC toolkit for naturalization workshops, available at: <http://www.cliniclegal.org/resources/toolkit-naturalization-workshops>
- Chapter 9 describing the workshop model in CLINIC's report, *A More Perfect Union*, available at: <http://www.cliniclegal.org/resources/more-perfect-union-national-citizenship-plan>
- NALEO's *Workshop Planning Toolkit* & additional partner resources, available at: <http://ciudadania.yaeshora.info/partner> (Log-in required: username: clinic, password: nacc)
- NALEO's *ya es hora* Citizenship Study Guide in English, available at: <http://ciudadania.yaeshora.info/downloads?id=0031> and Spanish, available at: <http://ciudadania.yaeshora.info/descargas?id=0022>

The screenshot shows the website for Catholic Legal Immigration Network, Inc. The main navigation menu includes: About Us, Programs, Resources, Trainings, News, Affiliates, Donate, and Shop. The 'Resources' section is active, displaying a list of links such as 'Deferred Action for Childhood Arrivals', 'Advocacy Letters/Comments', and 'Articles by CLINIC'. The main content area is titled 'Toolkit for Naturalization Workshops' and includes an 'Introduction' section with text about the workshop's purpose and a 'General' section with a link to 'Planning & Organizing'.

The screenshot shows the website for Catholic Legal Immigration Network, Inc. The main navigation menu includes: About Us, Programs, Resources, Trainings, News, Affiliates, Donate, and Shop. The 'Resources' section is active, displaying a list of links such as 'Deferred Action for DREAMers', 'Advocacy Letters/Comments', and 'Articles by CLINIC'. The main content area is titled 'Updated Resources Action for DREAMer' and includes a 'Latest Blog' section with a post dated Jul 21, 2012.

Resources: CitizenshipWorks

- A web-based portal with free information and self-help tools for immigrants and service providers
- Has public section and password-protected advocate section
- Advocate section has interactive citizenship application form interview & an intake interview for use in group processing settings
- www.citizenshipworks.org

The screenshot shows the CitizenshipWorks website. The main navigation menu includes: Understand Your Eligibility, Learn About Naturalization, Prepare for the Test, Find Legal Help, and Understand Citizenship Resources. The 'Understand Your Eligibility' section is active, displaying a video player and a 'Get Started' button. The page also includes a 'Powered by' section with logos for various organizations.

The screenshot shows the OWN the DREAM website. The main navigation menu includes: Get the Basics, Requesting Deferred Action, Find Legal Help, Events, News, and FAQ. The 'Requesting Deferred Action' section is active, displaying a video player and a 'Get Started' button. The page also includes a 'Powered by' section with logos for various organizations.

Resources: Self-Directed E-Learning Course

- “Volunteers Helping Immigrants Become U.S. Citizens: The Naturalization Group Application Workshop”
- Available at: <http://cliniclegal.org/self-directed>
- Can be used to help train volunteers for workshop events
- Takes 40-60 minutes, includes quizzes and a certificate of completion

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What is a “Mega Workshop?”



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What is a “Mega Workshop?”

A one or two-day community event that brings professionals and trained volunteers together to assist large groups (150-300+) of immigrants in completing an application to USCIS.

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Poll # 1

- Have you ever organized a group application workshop? Yes/No

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Poll #2

- If yes, how many people were served?
- 1-25
- 26-150
- 151-300
- 301+

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Poll # 3

- If yes, what was the purpose of it? naturalization, TPS, refugee I-485, DACA, other?

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Workshop Immigration Purposes

- Naturalization
- Deferred Action for Childhood Arrivals
- Refugee & Asylee Adjustment of Status
- Temporary Protected Status
- Prospective CIR, Dream Act or AgJobs

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What's the difference between a mega workshop and a smaller group application workshop?

- Scale or size
- Model options
- Partnerships
- Media outreach
- Planning
- Coordination
- Communication
- Resources

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Why do a mega workshop?

Pros:

- Builds community support and awareness of immigrants and immigration services
- Maximizes impact of services in the community
- Maximizes efficiency and convenience

Cons:

- Complex planning and implementation
- Unexpected circumstances
- High stakes

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Planning Overview for a Mega Workshop

- Needs assessment
- Create partnerships
- Make program decisions
- Secure funding, resources, and sponsors

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Planning Overview, Cont'd

- Volunteer recruitment, role assignment, and training
- Early media outreach to target imm. populations
- Gather forms, documents, materials, and supplies
- Set-up for the event

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Needs Assessment

- How many eligible applicants in your community?
- Have they indicated a willingness to attend?
- Who else does workshops in your community?

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Partnerships

- Legal immigration service providers
- Pro bono attorneys (AILA, ABA, etc.)
- United We Dream
- Community organizers
- Ethnic community-based organizations
- Local government
- Congressional representatives
- Labor unions
- Public and private schools



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Partnership Considerations

- Workshop sponsoring organization(s)
- Volunteer and workshop coordinator
- Pre-registration and screening
- Training responsibilities
- Pre-event communication with volunteers and applicants
- “Custody” of cases
- Capacity to give follow-up appointments, referrals and auxiliary services

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Program Decisions

- What workshop model to use?
- How many events to organize?
- How many people to serve?
- What are the pre-registration and walk-in policies?

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Program Decisions, Cont'd

- Will workshops be scheduled in shifts?
- Who will have custody of cases?
- What is the scope of services offered?
- What fees will be set for services?

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Program Decisions, Cont'd

- What are the best locations for mega workshops?
- Where will volunteers be found?
- Who will be responsible for:
 - Outreach?
 - Training?
 - On-site management?
 - Quality control?
 - Project evaluation and reporting to funders?

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Mega Workshop Models

- 2 – 1 day for prior registration, orientation & pre-screening & a day for application completion
- 1 –day for all services to be more convenient and allow for walk-ins
- One-on-one assistance
- Classroom or group style

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Mega Workshop Models, Cont'd

- Start-to-finish applications with assistance
- Pre-populated, *pro se* applications for review only
- Paper & pen
- Laptop/tablet-based (e-filing in future)

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Mega Workshop Models, Cont'd

- Hybrid of options above
- Alternative models?
- Talk with experienced workshop organizers

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Considerations for 2-Day Model for Registration & Pre-Screening Model

- Weigh pros and cons
- Extra outreach and scheduling
- Balancing TMI and legal representation
- Anti-UPL warnings

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Considerations for 2-Day Model for Registration & Pre-Screening

- Assign more than 1 organization for registration & screening to share workload
- Online, secured database for both
- Online screening tools
- Case selection for workshop or appt.?

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Custody and Scope of Services

- Services that will & will not be provided
- Custody of case decisions
- Legal representation considerations
- G-28s filed
- USCIS Statement on G-28s
- Workshop fees

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Poll Data on Fees for DACA Workshops

- 146 responses from webinar attendees
- CLINIC affiliates and non-affiliates

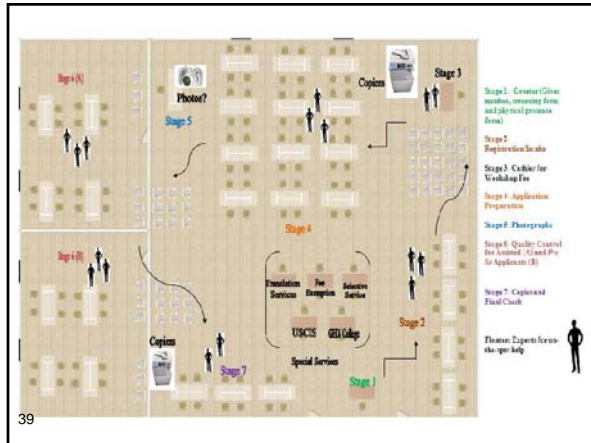
	<u>Workshop</u>		<u>Individual Rep.</u>
\$0	21%	-	11%
\$1 – 50	17%	-	15%
\$51 – 100	16%	-	21%
\$101 – 150	21%	-	19%
\$151 +	25%	-	34%

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Site Location

- Ample, free parking & public transport
- Know if security or janitors are required
- Large area for waiting room and separate workstations
- Privacy and confidentiality
- Photocopiers essential (backup with extra toner and paper)
- Kitchen for food and drinks

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Secure Funding, Resources, and Sponsors

- Put workshop model in funding proposals
- Tell current funders you are adding workshops to your portfolio of services
- Ask law firms to help with supplies, food, volunteers
- Ask Congressional reps., USCIS, or local government to help with outreach, materials, supplies, volunteers

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Poll # 4

For a mega workshop, what ratio of volunteer to applicant is desirable?

- 1 volunteer for every 3 applicants
- 1 volunteer for every 5 applicants
- 1 volunteer for every 10 applicants

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Volunteer Recruitment

- Recruitment strategy for:
 - Immigration law experts (attys. & BIA reps.)
 - Law graduates and students
 - ESOL & citizenship teachers
 - Places of worship
 - Other
- Use registration form to collect key information

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Pro Bono Attorney Recruitment

- Seek attorneys with experience in immigration law
- Knowledge of criminal law useful
- Tap legal associations/networks – AILA, ABA, other legal societies
- Assignments: pre-screening / eligibility floaters, applications floaters, quality control
- Provide recognition: certificates, commendations, celebration

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Volunteer Training

- Authorized, subject experts train
- Require for all volunteers
- Provide training options:
 - In person
 - Online meeting
 - CLINIC's self-directed course for naturalization
 - CitizenshipWorks & DACA Tool

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Volunteer Training, Cont'd

- In advance of workshop
- Day of orientation by station captains
- First-time volunteers shadow someone with experience
- Volunteers seek on-the-spot feedback from roving expert (floater)



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Media Outreach

Develop a media database

- Ethnic media, local media
- *key titles: assignment desk, community calendar, reporter...*

Promotion vs. Coverage

- Press Release – pre / post workshop
- Media Advisory – general announcement
- Press Conference – key spokespeople / elected officials

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Media Outreach, Cont'd

- Have a clear ask
- Full Screens, News Stories / Articles, Programming, PSA's
- Full Screens – easy, economical, and safe
- News Stories / Articles – bring value to workshop, provides larger framework

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Media Outreach, Cont'd

- Programming – have a media ready staff person or applicant with a compelling story, propose a segment
- PSA – high production costs, difficult to get media to commit, limited air time, works only if you have ready-made PSA's

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Tips for Media Outreach

- Make it as easy as possible for media – prepare visuals in advance
- Always have talking points ready
- Disseminate press release and advisory with sufficient time in advance – *not too early!*
- Establish relationship with media partners – reporters, editors, writers
- Identify key spokespeople within your organization and amongst your applicants
- Connect your efforts to the larger framework

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POLL # 5

- Do you have experience working with paid media or unpaid?
- Unpaid
- Paid
- Both

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Forms, Documents, Materials, & Supplies

- Use checklist of items
- Key USCIS forms
- Laptops, power cords & surge protectors
- Photocopiers, toner replacement, lots of paper (# for repairs ASAP)
- Cameras, film, batteries
- Food

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Forms, Documents, Materials, & Supplies, Cont'd

- Waiver about scope of representation
- Registration & Screening Form
- Study and referral materials for applicants (see toolkit)
- Other supplies: notepads, pens, pencils, white-out, post-it notes, nametags, mailing envelopes (see More Perfect Union, pg. 97)

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Set-up – Think Crowd Control

- Parking lot sign
- Front door sign
- Signs for each station
- Checklist for stations helps applicants navigate room or building
- Waiting area
- Name tags

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Set-up, Cont'd

- Set up area of tables for special services – USCIS, translation, fee waivers, selective service, GED/college
- Resource table with information and referral sheets for ESL, other services
- Volunteer sign-in table to collect info. & name tags, assign to stations
- Media check-in table: register media, provide press kits, direct to designated staff

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Poor Planning Hypothetical

Exuberant Elyssa decides to organize her immigration program's first workshop and make it big. She seeks advice from a retired staff person who did a smaller workshop 15 years ago. She decides to make the first workshop available for DACA applicants. All three staff are asked to volunteer on a Saturday. Wanting to serve everyone, Exuberant Elyssa decides to not require prior registration and pre-screening. She thinks it just adds more work which can be done at the workshop. Elyssa calls local AILA attorneys and other volunteers the week before asking for their availability. Elyssa got too busy to call earlier. Besides, doesn't everyone want to help like her? The training is scheduled the night before the workshop. Elyssa asks media to cover the event but fails to ask them to advertise the workshop.

At the workshop, Elyssa feels compelled to manage registration and intake for early arrivals, serve as an expert floater for applicants with questions and do some quality control in the afternoon. More people show up than expected. Some volunteers are late, confused about the starting time. The one photocopier jams and runs out of toner since no one was asked to check beforehand. A volunteer cooks lasagna for 50 volunteers but no one planned to bring eating utensils, plates and cups. 4:00 p.m. rolls around and volunteers are weary but 20 applicants out of 200 people have not been assisted and 40 people are waiting for quality control. Elyssa decides to have 4 volunteers help the 20 finish and let them and the 40 other people go without quality control. Elyssa is exhausted but feeling very proud of her accomplishments. In her exhaustion, she forgets to clean up hoping later the host site won't mind.

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Tips for Managing Large Numbers

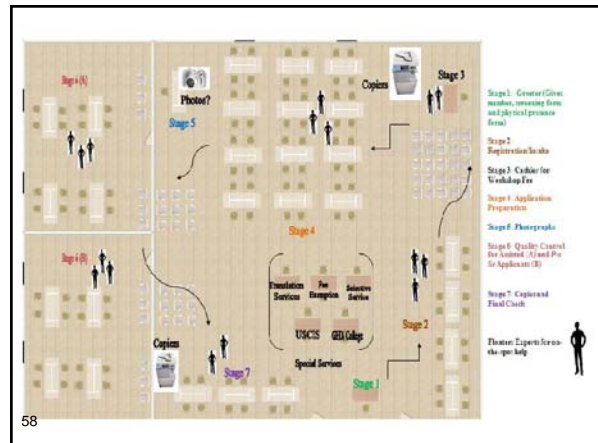
- Use registration and pre-screening
- Place a cap on the number to be served and let them know early if they can't be served
- Serve registered applicants first
- Have volunteers work in shifts
- Use volunteers for crowd control
- Assign station captains as logistics and substantive experts

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Stages of the Workshop Event

1. Greeter
 2. Registration & Screening
 3. Cashier (maybe copying, too)
 4. Application Assistance
 5. Photographs (if required)
 6. Quality Control (assisted & pro se walk-ins)
 7. Copies & Final Check
- * Use station captains to manage each station

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1. Greeter

- Gives number, screening form, and worksheets
- Helps assess # of arrivals to determine how many can be served
- Running out of pre-determined #s informs people they can't be served
- Informs people how to come back or get services by appointment

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2. Registration & Screening

- Intake for simple assessment of prima facie eligibility
- Confirmation of all required documents
- Referrals for persons screened out
- Legal experts (attorneys or BIA reps) supervise this station



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Registration & Screening, Cont'd

- Pre-registered get served first
- Applicants directed to wait for number called
- Waiting period can be used for presentations, orientation, or Q & A with USCIS

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3. Cashier

- Takes payment for workshop fee
- Money orders preferable
- Gives receipt
- Keeps copy of receipt
- Need a safe box for storing payments
- Two people preferred for accountability

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Copying Supporting Documents

- To avoid backlog, copy supporting documents while applicants wait for application assistance
- Volunteers should assist applicants to organize documents by eligibility criteria and chronologically

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4. Application Assistance

Preparer:

- Preserves confidentiality
- Verifies registration/screening sheet
- Completes the application
- Seeks help from roaming experts (floaters)
- Identifies any "red flags" for the final review/quality control stage
- Completes preparer's box

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What's a floater?

- Roaming legal expert for on-the-spot help
- Immigration attorney or BIA accredited rep.
- Use floaters at various stages: intake, application assistance, quality control

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5. Photographs

- Two color photos required
- Volunteer or staff must be familiar with USCIS photo requirements (same as passport requirements – see toolkit for requirements)
- Write applicant's A-number on reverse side of each photo, in pencil



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6. Quality Control

- Break into two sections, A and B
- Section A is for assisted applicants
- Section B is for *pro se* applicants



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6. Quality Control, Cont'd

- Legal expert required (immigration attorney or BIA rep.)
- Final review of application
- Expert confirms eligibility, reviews the application form, corrects any errors, and makes a determination on any “red flag” issues
- Follow-up appointments as needed

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7. Copies and Final Check

- Application and attachments photocopied (1 copy for applicant, 1 for org. signing G-28s)
- Check or money order for USCIS is completed



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7. Copies and Final Check, Cont'd

- Application packet is assembled
- Pre-addressed envelope for mailing
- Certified mail with a return receipt recommended

* Host agency mails applications with G-28s

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Workshop Follow-up

- Office appointments
- Thank you letters to all volunteers
- Volunteer feedback
- Partners de-brief, assess strengths and weaknesses
- Follow-up to confirm applicant success rate

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Questions?

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NALEO's Experiences with Lizette Escobedo

- Post a question for Lizette

Challenges:

- What does it cost to host a workshop?
- What is your best location/facility?
- What is the best advertisement?
- Have you had low-turnout for applicants or volunteers?
- How do you serve people with language needs?

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NALEO's Experiences with Lizette Escobedo

Lessons Learned:

- What do you use to keep large crowds happy and moving?
- How do you effectively turn people away for another day or appointment?
- How do you prevent equipment breakdowns?

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NALEO's Experiences with Lizette Escobedo

Recommendations:

- Tell us about your walkie-talkies
- Is there funding for workshops?
- Do you charge a workshop fee?



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NALEO's Experiences with Lizette Escobedo

Recommendations:

- Visible signage
- Include map, directions (be specific – room number, landmarks, etc.), and documents to bring on flyer
- Feed your volunteers!



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Questions?

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Best Practices

- Plan
- Prepare applicants to be 100% ready
- Partner with others for referrals, volunteers & representation
- Practice and modify models for perfection
- Promote success

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Quality Planning Hypothetical

Exuberant Elyssa decides to organize her immigration program's first workshop and make it manageable, not too big. She studies CLINIC's workshop toolkit, calls an experienced workshop manager in another city and holds a staff planning meeting. She decides to make the first workshop available for naturalization applicants, a population staff knows well. Staff identify who they will call in advance to volunteer plus themselves. Training is offered twice to accommodate different schedules. To facilitate planning, staff decide to open early registration and pre-screening but accept walk-ins from 11:00 a.m. to 3:00 p.m. The agency's communication director contacts local English and Spanish media outlets and secures free announcements to advertise the workshop. One outlet covers the event and tapes it for the 11:00 p.m. local news.

At the workshop all stations spots are filled with trained volunteers. More walk-ins show up than expected but a greeter helps people at the end of the line begin completing registration and screening sheets. Both copiers have toner and lots of paper. Volunteers are appreciative for a staggered lunch break. 4:00 p.m. rolls around and volunteers are weary but only 3 applicants out of 200 people have not been assisted and 8 people are waiting for quality control. Elyssa decides to release some volunteers but have enough available until the last applicant leaves. Elyssa is exhausted but feeling very proud of her accomplishments. The next workshop date is already scheduled and some DACAs are registered and pre-screened. Elyssa returns to the office on Monday to send thank you notes and emails to every volunteer. The organization's newsletter features the workshop and funders are informed.

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Questions?



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