



CATHOLIC LEGAL IMMIGRATION NETWORK, INC.

Top 5 Transition Issues in Program Management
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Presenters

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Webinar Goal

Staff and resource transitions are not uncommon in the life of an immigration program. Unfortunately, not enough programs plan ahead to prevent from losing its ability to practice immigration law through an authorized representative when there's staff turnover or when revenue streams fluctuate. Today, we hope to address a few complicated scenarios that programs have faced in our network. Presenters will pinpoint the challenges, offer solutions, and share best practices on how to tackle these scenarios head on so services can continue without interruption.



Staff Transition

- African Services has been providing charitable immigration legal services for the last 10 years through one full-time partially BIA accredited representative/Program Director, Awesome Amy. Unfortunately (for AS), Amy’s husband has just retired and wants to start traveling. Amy has provided the agency a 1 month notice.



Best Practice

- Always have a back-up to representatives and attorneys, especially solo reps, in case of staff turnover or leave of absence so no halt in ability to provide services. Possible solutions:
 - Another person in the agency with proper training, experience, and BIA status to jump in until new person hired
 - An agreement with a local attorney/authorized provider of legal services to take over cases temporarily until a replacement can be found.



Staffing Your Program

- Catholic Social Services (CSS) is happy to announce that it has hired a new Program Director Penelope who will be overseeing the immigration legal services and refugee resettlement program. She does not have a background in immigration law. CSS is an agency with 2 full time BIA accredited representatives and 2 part time administrative assistants who have all been there for over 5 years.
- CSS has been awarded a federal grant to help immigrant survivors of violence. Penelope, the Program Director decides to hire the program’s first attorney.



Best Practices

- Always build training into your budget and also have new staff train with other advocates in the office so they learn about a how to process other types of cases, you never know when there will be staff turnover and when you will need coverage
- Have new and existing staff identify a common agency mission/plan
- Develop mentorship opportunities for your staff with peers at other agencies



Moonlighting

- Immigration Legal Services recently found out that a partial BIA representative, Mario, has been providing immigration legal services out of his home on evenings and weekends and charging fees. Everything came to light when someone he assisted in such manner comes in to file a complaint about an RFE they received on an asylum application. Your office does not provide assistance with asylum applications nor can staff locate the client's record or any documentation in your program's CM database, yet the applicant has a USCIS receipt notice with Mario's name listed as the representative.



Best Practice

- Have attorney and non-attorney staff sign an agreement that explains limitations to providing services as well as consequences, if found to have violated the agreement
- Sample moonlighting policy in Case Management toolkit
- Create Checks and Balances to prevent future conflicts of interest, malpractice and minimize risk



Integrating CM Software

- Miguel Naranjo, Director of Religious Immigration Services (RIS)-CLINIC
- Basic Set Up
 - Immigration forms – www.uscis.gov
 - Client Data – Excel spreadsheet
 - Paper file – client documents, petitions, applications, personal information, etc.



Integrating CM Software

- Upgrade – online case management system
 - Manage everything in one place
 - Client file accessible from anywhere
 - Limit paper file



Integrating CM Software

- Factors to consider
 - Cost
 - Ease of use
 - Training
 - Long term investment



LawLogix

- EDGE case management system
- CLINIC exclusive agreement for affiliates
- Reduced pricing on fees
- More training opportunities
- 3-year experiment successful
- Starting a new agreement
- <https://cliniclegal.org/lawlogix-immigration-partner-program>



Loss in Funding/Closing a Program

- Immigration Legal Services of Eastern Oregon just learned that they will be losing a state grant that had been funding their VAWA program. They will no longer be able to keep their accredited representative on staff to handle the VAWA work, they will seek funding to see if they can keep her on part time but she may have to transition into something else.



Best Practice

- Always have some emergency funding reserved if you don't consider instituting a fee for service
- Have a plan in place for how you will handle currently pending cases; establish a referral system in the event that you need to stop taking cases
- Develop a draft wind down plan and maintain agency reputation in the community



CLINIC Resources for Training Staff and Volunteers

- Rapid E-Learning Course, “Completing the Application for Naturalization, Form N-400”
<https://cliniclegal.org/n400>
- Webinar: Training Teachers-Tricks, Tools and Strategies for Volunteer-based Language Learning Programs
<https://cliniclegal.org/calendar/training-teachers-tricks-tools-and-strategies-volunteer-based-language-learning-programs>



Upcoming Immigration Program Management Trainings

- September 16-17, Selected Issues in Program Management & Promising Practices in Preparing for Administrative Relief.
Silver Spring, Maryland
- November 3-4, Developing and Sustaining an Immigration Program.
Tampa, Florida



Questions?



Thank you for learning with us!

CLINIC envisions a country where every immigrant has access to affordable, quality immigration legal services.

Stay involved, build your expertise, and empower your community.

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To support CLINIC's mission and foster welcoming communities, make a donation at [cliniclegal.org/donate](#).





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