New Virtual Workshop Models
May 12, 2021

Meet Your Presenters

Ben Brokaw
Project Coordinator
Capacity Building Section
CLINIC
Bbrokaw@cliniclegal.org

Guest Speakers

Crystal Ortega, Senior Attorney
Catholic Charities Archdiocese of Galveston Houston

Heather Kwak
Immigration Legal Services Director
World Relief Southern California
Guest Speakers
Vanessa Joseph, Senior Staff Attorney
Catholic Legal Services
Archdiocese of Miami

Sydney Bright, Naturalization Manager
Catholic Charities
of the Diocese of Arlington

Agenda
• Traditional and virtual workshop models
• Catholic Charities of Houston
• World Relief of Southern California
• Catholic Legal Services of Miami
• Catholic Charities of Arlington
• Panel discussion
• Resources
• Q & A

Poll Question
Has your agency conducted or participated in any virtual workshop?

Yes
No
Poll Question

Which virtual workshop type would your agency be most interested in providing to your community?
- Naturalization
- TPS
- DACA
- Other

Traditional In-Person Workshop Model

- A one day community event that brings professionals and trained volunteers together to assist immigrants in completing an application to USCIS
- Typically focuses on simpler cases
- Breaks down application into stages to maximize efficiency and impact

Virtual Workshop Model

- Replicates impact and efficiency of in-person workshops through:
  - Potential to connect with clients anywhere
  - Increased ability and flexibility to connect volunteers
  - Applicants able to complete applications
Guest Speaker

Crystal Ortega, Senior Attorney
Catholic Charities Archdiocese of Galveston Houston

Virtual Workshop Model

In-Person Model
Virtual Workshop Model

Applicant Perspective

- Screen applicant
- Mail or email registration packet
- Pre-workshop
- Follow up for return of registration packet
- Confirm appointment time & that a volunteer will be calling
- Complete liability waiver

Post-workshop
- Legal review, fee waiver, check out

Volunteer Related

- Confirm availability for date of workshop
- Provide training materials & Zoom / Teams meeting link
- Provide limited client information
- Remain available by phone and Zoom or Teams to answer on the fly questions
- Confirm N-400 Forms are returned by volunteers

In-Person Workshop

- Red flag screening
- N-400 completion
- Including addendums
- Legal review
- Checkout
- New waiver
- Mentoring new volunteers

Volunteer Tasks

Virtual Workshop

- Attend training on day of first workshop
- Complete N-400’s for applicants assigned
- Return N-400 to Cabrini staff
Observations

- Ensure that applicants are fully informed of the scope of service
- Set firm deadlines for applicants to submit documents
- Appointment reminders improve punctuality and likelihood of follow-through
- No-shows – both applicants and volunteers are more common with the virtual workshop model
- Have staff available to cover no-show volunteers

Guest Speaker

Heather Kwak
Immigration Legal Services Director
World Relief Southern California

DACA Renewal
Virtual Workshop Model

Presentation by:
Heather Kwak, Office Director
DOJ Accredited Representative

world relief
SOUTHERN CALIFORNIA
Step 1: Registration
1. Create registration link
   - Google Forms
   - Microsoft Forms
   - Turn into bitly (bitly.com)
   Example: bit.ly/wrsocaldacarenewals
2. Screen for red flags

Step 1: Registration Continued
2. Registration questions:
   - Do you agree to a group setting?
   - Name
   - Phone #
   - Email
   - Will you DACA expire after 09/05/2016?
   - When does your DACA expire?

Terms of Agreement

I understand World Relief’s FREE DACA Renewal Virtual Workshop will help me prepare my DACA application, but will not be representing me and is not authorized to accept or submit the DACA application for me. I acknowledge that this is an educational and informational program only and I will be responsible for filing my own DACA renewal application. World Relief is committed to keep its costs low to make the program as accessible as possible. The program will not offer direct legal services under “Pro Bono” status. Attendees will complete their own application under “Self-Represented.” Attendees will complete their own application under “Self-Represented.” Attendees will complete their own application under “Self-Represented.” Attendees will complete their own application under “Self-Represented.” Attendees will complete their own application under “Self-Represented.”
Step 2: Pre-Screening

Assess eligibility
- Red flags direct towards individual appointments

Prepare applicant for workshop
- Suggested devices (computer/printer)
- Explain group setting
- What to prepare (previous DACA copy and EAD)
- Explain no G-28

Email all confirmed and screened applicants
- USCIS forms
- Limited Retainer
- Zoom Registration Link

Sample Limited Retainer

Step 3: Workshop Day

Tech person

DOJ/Attorney

Presenter

Tech person
Step 4: Post Workshop Instructions

For more information and to make an appointment visit our website at: https://worldreliefsocal.org/

Stay connected to us on social media:

@World Relief Southern California
@wrsocal

Guest Speaker

Vanessa Joseph, Senior Staff Attorney
Catholic Legal Services
Archdiocese of Miami
Virtual TPS Workshops
Miami, Florida
Vanessa Joseph

The Process

In the beginning ...
Before the workshop ...
- Potential applicants register online or by calling a hotline
- Asked a series of basic screening questions
- Eligible applicants then complete registration
- Applicants choose the date and time that is most convenient
- Receive an email confirmation with the date, time, and next steps for the clinic
- Registration information is automatically converted into an excel spreadsheet that is accessed via Google Sheets and shared with TPS buddies
TPS Buddies

- TPS buddies are assigned a list of applicants
- TPS buddies call applicants to complete secondary screening to ensure eligibility for the clinic
  - If eligible, buddy guides applicant through next steps to ensure that they have everything they need before the clinic
- TPS buddies stay connected with applicants to ensure
  - That they have all of their documents ready
  - They have the information they need to access the clinic
  - They are ready to participate in the clinic
- TPS buddies provide any relevant notes within the Google Sheets document

But at the same time ...

While client registration and onboarding is taking place ...

- Potential volunteers register online
- Potential applicants choose the date and time that is most convenient
- They receive an email confirmation with the selected volunteer dates, times, and next steps for the clinic
- Registration information is automatically converted into an excel spreadsheet that is accessed via Google Sheets and shared with Legal Captains
- They receive e-mails containing a tip sheet and training information
- They are asked to join a WhatsApp group where all volunteers can request assistance or ask questions of Legal Captains

During the clinic...

Do not panic...

- All participants log onto Zoom
  - Coordinators and captains log on 30 minutes in advance
  - Legal volunteers log on 15 minutes in advance
  - Applicants log on at the shift time
- Pre-recorded video is played for legal volunteers, then they are assigned to breakout rooms
  - Reminders of how the event will flow
  - Expectations
  - Where to find assistance
- Pre-recorded video is played for applicants, then they are assigned to breakout rooms to meet the preparer
During the clinic...

Do not panic...

• Throughout, volunteers are able to request assistance through WhatsApp chat and a legal captain will pop in to address the situation
  • Volunteers can request
    • Technical assistance
    • Interpretation
    • Legal consultation
    • Review of applications
• In advance, volunteers receive files contained pre-filled and pre-signed copies of the relevant forms

During the clinic...

Do not panic...

• Once the service is complete, the preparer completes an exit form on Google Forms
  • Enter client information
  • Upload documents
  • Include relevant notes
  • Submits everything to a central Google drive link created for the series of clinics
• Then, the preparer e-mails documents and relevant information to the client and copies the central e-mail address created for this purpose

After the clinic...

We cry ...

• We debrief as a team
  • Pluses
  • Deltas
• We develop solutions for future clinics — no matter how near or far
• We prepare for the next clinic
  • Update registration form
  • Promote the clinic
  • Recruit volunteers
  • Train legal captains
Pluses and Deltas

Pluses...
Like fine wine, we get better with time …
- Easier to provide services to more people regardless of location
- Easier to recruit volunteers – more volunteers, different parts of the country
- Assistance is easier to provide
- Less client drop off
- Less volunteer drop off — sometimes
- All you need is stable internet, Zoom, and a functioning computer

Deltas...
It's all good until it's not …
- Not everyone is tech savvy — volunteers, especially
- No matter how easy you make it, some people like to complicate things
- No matter how much good you do, it may never be enough
Guest Speaker

Sydney Bright, Naturalization Manager
Catholic Charities of the Diocese of Arlington

---

A virtual approach to naturalization assistance

By
Sydney Bright
CCDA-HOGAR

---

Initial Steps
Remote Workshop Flow
Our Naturalization Team

- Nancy Schmelter - Naturalization Volunteer
- Jesus Garcia - Naturalization Intern
- Stephanie Cangialosi - Pro-Bono Coordinating Attorney
- Sydney Bright - Naturalization Manager
- Stacy Jones - Program Director

Initial Steps - Remote Workshop

**CLIENT CONTACT**

Step 1: Client contacts Hogar
- a. Calling our main line: 703-534-9805
- b. Texting us: 703-940-2851
- c. Visiting our website: www.ccoma.net/HogarLegal

**BOOKING AN APPOINTMENT**

Step 2: Client books initial consultation on our website. Client also pays through our website.

Internally:
- Client is added to our legal software.
- Client is sent two emails - one with the contract and intake sheet and the other with instructions on our process.
- Volunteer assists client in completing the intake sheet and gathering documents.
ATTENDING AN APPOINTMENT
Step 3: Client attends consultation with Staff attorney via
a. Telephone Call
b. WhatsApp Video Call
c. Zoom Call

Internally after consult:
   a. Attorney share with naturalization manager if client is workshop eligible
      a. If client is not, then client may be referred to another organization or may continue with staff attorney.
      b. If client is eligible, then client receives our next steps email with access to Citizenshipworks (CW).
   b. Naturalization Team stays in constant communication.

COMPLETING THE N-400: CITIZENSHIPWORKS
Step 4: Completing the N-400
Client received Next Steps email with the Natz team b/cc:
   - Client creates and completes application on Citizenshipworks (CW)
   - The Next Steps Email is a template we use to tell clients how to get to CW, when the review date is and who to contact if they need assistance.

Internally:
   - The Natz team is in constant communication on how many clients are moving onto the review day and who needs the most assistance ahead of the review day. This is also when we brief our pro-bono partners on how many clients we will have.

DAY OF THE WORKSHOP REVIEWING THE N-400: CITIZENSHIPWORKS
Step 5: Client meets with Pro-Bono attorney.

Internally:
   - We pair clients and pro-bono attorneys and share client contact information with pro-bono attorneys.
   - Pro-bono attorney volunteers will introduce themselves to client and provide client instruction on joining the review call.
   - During the call, Naturalization Manager and Pro-bono Coordinating Attorney are available to answer questions.
PRINTING AND SIGNING N-400

Step 6: Printing and Signing N-400
Client can choose
a) come to the office to signature with payment options
b) mail their signature pages with the payment options

Internally:
Naturalization Manager contact Preparer to gather signatures and review completed application package.

SUBMITTING THE N-400

Step 7: Submitting N-400
Client receives a copy of the application, a study guide and what to expect in the next months with tracking number.

Internally:
Naturalization Manager contact Preparer to gather signatures and review completed application package, updates client file on software.

ADMINISTRATIVE LOGISTICS- CLIENT ASSISTANCE

• We’ve learned that clients need more assistance getting started with an all-online registration and intake as well as completion.
• Clients have multiple staff support throughout the entire process via call, text and email.
COLLABORATION WITH THE PRO-BONO PROGRAM

• 2-3 Months advance planning with the law firm
• 1 ½ months of client outreach
• 1 ½ months of screening
• 3 weeks of screening, completing the N-400 via Citizenshipworks
• 1 day of review with the pro-bono law firm

Panel Questions

• Advantages and Challenges?
• Continuing Virtual Models?
• Hybrid Models?
• Future of Workshops?

Resources

• AILA Citizenship Day Virtual Clinic Best Practices
  https://www.youtube.com/watch?v=VwTXNYTLIAI
• Citizenshipworks
  https://www.citizenshipworks.org/en
Thank You for Learning with Us!

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

• For the latest immigration happenings, CLINIC trainings, and newest resources, we invite you to sign up for e-news updates.

Thank You for Learning with Us!

• Follow us on Facebook and Twitter, visit our homepage for featured blogs and resources, and check our calendar of events to stay informed.

• Support CLINIC. To support CLINIC’s mission and foster welcoming communities, make a donation at cliniclegal.org/donate.