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A Primer for Technologists Working with Immigration Nonprofits

And lessons that can be applied more broadly to working with the nonprofit space

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Acknowledgments

I couldn't have done any of this work without the openness and assistance of a number of immigration nonprofits from around the country. Their herculean efforts in providing legal services and naturalization assistance to immigrants across the country are inspiring. They're worthy of your time and assistance. I'm particularly grateful for the help of the National Partnership for New Americans and the New Americans Campaign.

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About the Author(s)

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About New America

We are dedicated to renewing America by continuing the quest to realize our nation's highest ideals, honestly confronting the challenges caused by rapid technological and social change, and seizing the opportunities those changes create.

About Public Interest Technology

New America's Public Interest Technology team connects technologists to public interest organizations. We aim to improve services to vulnerable communities and strengthen local organizations that serve them.

Contents

Introduction

Over the past few years, I've been approached by a number of engineers, designers, product managers, and other technologists about how best to get involved in the immigration space. It's an interesting question, one I usually reply with, "Ask them if they need volunteers." Understandably, people want to put their skills to use and the space does have need for improved tech capacity.

At least that was our belief when we began this work at New America. Many of us came from federal government technology and innovation roles, like working at the U.S. Digital Service, and we hoped that we could take what we learned in government and apply it to the nonprofit field. We understood there were going to be differences in how we had to engage and what nonprofits responded best to, and adjusted our approach based on the field and the kinds of organizations we worked with. But, we believed there were enough similarities to warrant our approach. Through this work, we built on our understanding and have advice for others.

I've collected some of the lessons I've learned over the past few years, which I hope will be helpful for people who want to work or volunteer their time with immigration nonprofits. It's my hope that this primer will provide plainspoken, practical advice to folks who want to do good with their technical skills.

Areas of Work

My work on the Public Interest Technology (PIT) team has cut across three different varieties: one-on-one programmatic assistance with a local direct services organization, user research that aimed to determine why Green Card holders did or did not naturalize, and consultations with nonprofits in the space. I've learned a lot. The goal of this document is to help prepare you, intrepid technologist, when engaging with immigration nonprofits.

Consultation

It was clear to me that meaningful work would require building trust within the ecosystem. I wanted to take the time to learn what problems were actually affecting the space, rather than just the presumptions I'd accumulated through my years in the Obama administration. This meant outreach to immigration nonprofits through a mix of cold calls and introductions by peers. The Public Interest Tech team was new and was building its immigration practice, which led to a need to create trust between myself and the organizations I wanted to learn from. This led to consulting.

I led most conversations with questions geared towards learning what was going well and what wasn't with these organizations. What I hoped for was thorny technical issues or a service that could be redesigned, but what often came up were issues related to case management platforms, like Salesforce, or website problems. Those questions were easy to answer but led to more questions, often through follow-up. As far as I was concerned, this was a win because we were able to start a meaningful dialogue, build trust, and continue the conversation on how the organization used technology. While I welcomed the possibility of consulting with these organizations, not every group knew what to ask for or what type of support they needed.

BE PREPARED TO SCALE YOUR ADVICE

There are many organizations in the immigration ecosystem, and while many are unique, they largely follow similar patterns. What separated most organizations, for my purposes, was their comfort level with technology at the "service level" and their desire to change. It was common for folks to lay out for me their issues and the tool they thought would fix their problem, often hoping it would be the silver bullet they were looking for.

Advice:

- Problems aren't always technically difficult, fun, or interesting to work on. There likely won't be a lot of novelty—sometimes folks just need a Google Form. Your job isn't to talk them into a better widget, it's to provide them with the best option they can maintain and support after you're gone.

- Be prepared to answer questions unrelated to what you want to help them with. I talked to organizations about payment applications and broadband, because that was what was most needed.

CONSISTENCY

"You're not the first person that's showed up to tell us how to fix things." I heard this sentiment quite a few times when talking to immigration nonprofits. Given where the world is, people want to help and their support can take many forms, but letting in, training, and supporting volunteers requires a lot of resources from the nonprofit that they don't always have. A lesson I learned in government was that folks are willing to wait you out. If you're a political hire or someone who's on a "tour of duty," then the calculus for a career government employee is one of whether they can outlast you. By consistently showing up, by being a regular, and by having a helpful presence, cynicism usually gave way to curiosity, which led to a more fruitful partnership. I believed this would translate to nonprofits, and it did in my experience. Showing up regularly and being empathetic goes a long way.

Advice:

- Before reaching out to an immigration nonprofit, be honest about how much time you have to commit: Is this a weekend project, or your day job? Implementation is never smooth or easy in any environment, so plan for months. If you can't do it, then question what kind of involvement you're able to have and see if other work or volunteer opportunities are available locally or on places like **Taproot**.

- Be prepared for setbacks. Organizational priorities change. Most will be working with vulnerable communities and will need to respond to a rapidly-changing landscape, which may mean that the technology project you're helping them with will wane in importance. This is normal and should be expected. If you're not prepared or willing to deal with backsliding, then this may not be the best route.

Finding the Right Partners

New America's PIT wanted to work closely with organizations in the space. Our hope was that we would be able to identify issues plaguing the organization and provide technical solutions that would hopefully scale to similar organizations. We circled a partnership with a service immigration nonprofit with tens of thousands of members, which we'll call *the Partner*. The Partner was a fantastic partner and worked in a number of different areas ranging from legal services to financial literacy to work placement. We developed a formal work agreement, a memorandum of understanding, and tackled their member intake process. Our thought behind this choice was that their intake was a solution that could potentially be scaled to multiple organizations, even if they weren't member-based, because every organization we encountered did some form of recorded intake before they were able to provide a service. Intake also affected several teams like membership, legal services, development, and naturalization.

The solution would be pretty simple—digitize the paper form with a process that could easily be captured into their customer relationship management. The form was long and captured a broad set of information, some of which felt more necessary than others. We learned through conversations across the organization that the form had effectively become a one-size-fits-all solution that met the needs of every vertical. It made sense, but led to a bloated form with information being collected at membership intake during a naturalization workshop that would not be needed that day. The culprit was most often grant reporting, which is not an area that could easily be ignored.

We first tried an entirely custom-made form, but quickly pivoted away from that. The thought process was pretty simple once we realized there was no way the organization, or many organizations like them, could change a custom form without us. We moved towards a commercial off-the-shelf product, a combination of tools like TypeForm and Zapier, which had enough ease of use and flexibility to work for us and the partner. In testing, we found that folks who were hoping for assistance could easily use the form and that we could successfully capture data in the Partner's Salesforce, for instance. However, there were requirements outside of our control that made the digital form untenable. Some of these issues came up over time, like shifts in priority, but others were longstanding and difficult to overcome. These included things like the form itself having no clear owner that could decide what to change or uncovering grant requirements that made the digital form more complex. After several months of work, it became clear that the Partner would be unable to make the changes necessary to move the project forward, so we took a step back from the partnership. While we didn't achieve what we wanted, we learned a lot along the way.

SHARED GOALS, NOT YOUR GOALS

A mistake I made early on was to believe that efficiency in and of itself was a good enough incentive to encourage organizational support for change. To the organizations I was speaking to, it was helpful, sure, but what would they actually get out of it? How would the efficiency I was proposing actually help them achieve their goals? Efficiency must be tied to outcomes and proposals should be clearly related to improving what the organization is doing.

Advice:

- Take the time to envision what happens if you succeed and relay that information, not just the time saved. It's not just about spending less time doing data entry, but what that person could be doing instead. Data entry is work that many organizations run on and is seen as valuable work—replacing it with even higher value work can get you closer to what you want.

- Scoping work is challenging. You're going to learn new things along the way that will alter your understanding of the problem or necessary solution. Check in frequently and discuss the trade-offs between custom and off-the-shelf solutions with your partners. Make sure folks know what sustaining a project looks like after you leave so that their concerns are considered as you're developing a solution.

UNDERSTANDING FUNDING AND HOW IT INCENTIVIZES THE ORGANIZATION

How do you put users first when organizations are incentivized to help the highest number of people possible? Funding can sometimes be directly tied to the number of people the organization serves, which creates an incentive around helping those that are easiest to help: cases that cause minimal fuss. The organizations I spoke to understood this was a problem, but looked to how their funding operated and realized that either they were able to employ folks and help people or they weren't. For technologists used to putting outliers at the forefront of their work, this can be discouraging. When thinking of how to improve this area, consider what structures are in place, whether through local/state government or philanthropy, and how you can help the organization in spite of the limitations in place.

Advice:

- There are a lot of useful things you can do to help the organization understand who's coming in the door for help. The best way to advocate

for the folks who need help is to help the organization better collect and reflect on the data they have available to them.

- Understand that commercial off-the-shelf tools are often the thing organizations need most. Tools like Salesforce aren't for every organization, but making sure organizations use simple tools, like G-Suite tools or those like them, can make a world of difference. Sometimes your job is to just train them on how to better use their existing tools or help them switch to an improved service.

GET TO KNOW THE ORGANIZATION AND WORK OUTSIDE THE TECH SILO

Tech is often an afterthought within nonprofit organizations. Most are too small or don't have folks on staff with those skill sets. In larger ones, you may find a few staffers dedicated to information technology services, but I've never found folks focused on service transformation or "digital innovation." Tech is a means, understandably, and many organizations don't understand what's possible. Your job is to help them integrate better thinking about technology and design into how they work.

That isn't to say that there aren't people who care deeply about improving organizational operations. They do, and these folks can be instrumental in driving a project forward, especially if you won't be working at the nonprofit five days a week. One of your first tasks should be to identify your partners within the organization. They'll likely fill a few different roles and the earlier you find them, the better off you'll be.

Advice:

- If you find yourself working with an organization with IT staffers, become their best friends. Chances are, they've identified problems or bad patterns. Be their champion and advocate for what they think is best, while doing your best to get them a seat at the decision-making table.

- Find your point of contact. You'll be new and may not know how the organization works or who does what. You'll have basic questions and having a point of contact early on will make it easier to get those answers instead of banging your head against the wall. Your point of contact will almost always be clear, but in cases where it isn't, don't be afraid to ask or, if you're in a professional partnership, get someone's name down in writing.

- Find your champion. It's important to find someone that can help keep momentum going when you're not around. Finding someone to champion your work on the inside can help. Identify who already had that good idea

and find ways to elevate them. Include them in your work, make it a two-way street. Skill exchange is a good way to create a rapport, but also think about how they may advance in the organization.

Research

Throughout my first year at New America, I was plagued by the question of why more legal permanent residents weren't naturalizing. The data showed that Green Card holders were growing in number, but the naturalization rates had been fairly stagnant. A number of the nonprofits I'd worked with were naturalizing immigrants and had a lot of anecdotal information as to why they thought folks weren't naturalizing, but there wasn't a lot of qualitative data. So we set out to learn more about what might be preventing people from naturalizing and what we could propose that would improve naturalization rates.

We received a grant to conduct this user research and, over the course of five months, a small team traveled across the country, where we interviewed 63 immigrants and citizens, conducted 117 surveys, and set up various testing sessions. We spoke to dozens of subject matter experts, attended workshops and English classes, and learned a lot about the immigration space. We worked hard to make sure the organizations we worked with and recruited interviewees alongside understood our research and how it could help them. Our research created a **report**, a series of wireframes, and other tools that are being used by nonprofits today.

HOW TO WORK ALONGSIDE NONPROFITS THAT ARE STRETCHED TO CAPACITY

Immigration organizations are stretched thin. The current political climate has immigrants feeling particularly vulnerable and the nonprofits in the ecosystem are doing their best to fill an ever-dwindling safety net. Your work with them should never stand in the way of the work they do to assist their community.

There are a few ways you'll interact with immigration nonprofits, likely through naturalization workshops, classes, or during legal intake. But you may also find yourself assisting them during a crisis. The naturalization workshop you've been waiting for all month may not have stellar attendance, but you've got to roll with the punches. The folks who are coming in for help are usually in vulnerable positions and will not be the "perfect" user. In my experience, folks coming into immigration nonprofits for assistance vary in age, English mastery, and tech acumen. There is generally no perfect user, but you'll likely be able to identify patterns that lead to archetypes or personas.

Advice:

- When you're doing any sort of user research, approach the community with empathy and great care. Never push folks to talk to you. Remember that the organization you're working with is vouching for you and you're now a part of the trust they've built with the community.

- Lend a hand. If you're at a workshop and speak another language, offer to translate. If they need a hand copying files, commandeer the copying machine. When helping folks with service design transformation, you learn a lot about how an organization operates and what they prioritize. Take these as an opportunity for active, not passive, learning opportunities.

- If you haven't spoken to enough folks, wait until after the event to talk to the organization. They'll likely be sympathetic and want to help you solve this problem.

FINDING A HOME FOR YOUR WORK

Whether building, designing, or conducting research, your work should be sustainable beyond your time with the organization. How do you make sure your contribution continues to be useful even after you no longer work in the space? In government, we had to hand our work off to contractors or programmatic offices for maintenance. In the nonprofit world, this is much harder. If we ever thought our work could not continue without us, we abandoned that approach and found a better one. How do you ensure folks will maintain or champion the work after you've completed your project?

Advice:

- Find the organizations in the space that are amplifiers for your work. The New Americans Campaign and the National Partnership for New Americans are national organizations made up of immigration nonprofits that work on a variety of issues, including naturalization. Each group has been a great partner to us. We've worked with each to share our report findings with their members and make our work a part of their best practices. Finding groups like them will help ensure that your work is reached by a much wider group than otherwise would have seen it.

- Think about necessary funding early and often. You may want to consider identifying foundations that work in the space and talking to them about understanding the usefulness of your project.

- You're unlikely to find an immigration nonprofit that can handle the maintenance of a new piece of technology you've developed for them. First, question if it's absolutely necessary to build a new tool for them. If it is, then make sure you either find funding for others to help them maintain it or be willing to spend time needed in the months and years to come helping them with issues that may come up.

Conclusion

Working with nonprofits in the immigration space has been one of the most rewarding experiences of my career. There is good, meaningful work to be found there, but, as mentioned above, volunteering or engaging these nonprofits should be done with caution and high regard for the work they do day-to-day.

Notes

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