



STRATEGIC PLAN 2021–2023

“we have our eyes on the future”



**Immigration Institute
of the Bay Area**

Serving immigrants and refugees since 1918

“For while we have our eyes on the future, history has its eyes on us.”

—Amanda Gorman, “The Hill We Climb,” Presidential Inauguration, January 20, 2021

MISSION

IIBA’s mission is to help immigrants, refugees, and their families join and contribute to the community. IIBA provides high-quality immigration legal services, education, and civic engagement opportunities.

VISION

We envision diverse communities where immigrants are valued, contributing members with full access to justice and economic opportunity.

DEAR FRIENDS,

IIBA first opened its doors in 1918, the year of the great pandemic. We used to wonder how IIBA's founding team weathered that storm while continuing to provide essential services to immigrants and refugees in the Bay Area. **Now we know.**

We can accomplish anything when we come together with passion, a shared purpose, and a commitment to serve. IIBA staff have demonstrated those qualities and more during this pandemic.

Fueled by an unwavering desire to keep delivering the high quality, low cost immigration legal services our community members sorely need, the IIBA team mobilized to reinvent our practices and continued to serve our clients remotely while sheltering in place.

To be clear, there have been challenges, but with the continued support of volunteers, pro bono attorneys, foundations, community partners, and donors, IIBA has persevered. As a result, despite a global pandemic and an administration hostile to immigrants, our clients have moved forward on the path to a more just and certain future.

On behalf of the Board and Staff of IIBA, thank you for walking that path with us. As we look forward, we are committed to doing our part to secure a more inclusive and equitable future for all.

“We’ve learned that quiet isn’t always peace and the norms and notions of what just is isn’t always just-ice.” —Amanda Gorman, *National Youth Poet Laureate*



Ellen Dumesnil
Executive Director



Jennifer Beckett
Board President

HISTORY AND GEOGRAPHIC REACH

For 103 years, amidst ever-changing U.S. policies and attitudes toward newcomers, IIBA has been a steadfast advocate for the rights of immigrants, refugees, and asylum seekers. A regional organization with eight offices in six Bay Area counties, the Institute is the largest nonprofit provider of immigration legal services in Northern California, with a legal team of 46 reaching an estimated 10,000 individuals annually. In the past decade, the Institute has expanded into rural and underserved areas that are home to growing numbers of immigrants.



IIBA locations

IMPACT

Continually striving to achieve maximum impact and adapt to emerging community needs, IIBA delivers individualized support for immigrants and their family members. During FY 2018-2020, IIBA:

- ▶ Provided legal consultations for 9,529 immigrants
- ▶ Helped 3,332 individuals petition for citizenship
- ▶ Assisted 879 individuals petitioning to reunite with their families
- ▶ Supported 1,772 young immigrants to apply for or renew their DACA status
- ▶ Hired five additional attorneys who are representing 117 individuals in deportation cases
- ▶ Helped 369 survivors of domestic violence and victims of crime file for legal protection
- ▶ Engaged 442 volunteers and pro bono attorneys who dedicated 6,637 service hours
- ▶ Increased IIBA's budget by 27.6%

STRATEGIC PLANNING

Context

The last four years have been marked by extreme volatility, as the Trump administration sought to dismantle the U.S. immigration system. Over 400 executive orders and policies sought to erode long-standing protections for immigrants and refugees by enacting travel bans, visa changes, and new public charge rules; curtailing refugee resettlement and blocking entry to asylum seekers; eliminating DACA and separating immigrant parents from their children; and increasing fees for many types of immigration applications, including citizenship. As the 2020 Presidential election approached, immigrants' lives and livelihoods hung in the balance.

In 2020, as the country was gripped by the COVID-19 pandemic, IIBA staff juggled work and family responsibilities while adjusting to delivering services to clients remotely. Clients, many at greater risk of contracting the virus as essential workers, navigated new technology to access IIBA's services. The pandemic crisis highlighted and exacerbated pre-existing inequities for many low-income Californians, including immigrants, while record-breaking wildfires devastated communities IIBA serves, and the murder of George Floyd sparked widespread protests demanding racial justice and criminal justice reform.

In this context, IIBA engaged local stakeholders, funders, and clients in strategic planning, knowing that looking forward with creativity and determination is critical at a time

when so much is at stake. As a result, IIBA is positioned to play a critical role in Northern California's immigration legal landscape over the course of the next two years and far beyond.

Process

Strategic Planning Committee

IIBA's Strategic Planning Committee, composed of IIBA staff and board members, served as a sounding board and provided critical feedback.

Staff and Board Engagement

The senior management team offered input at several meetings, the full staff took part in two strategy sessions, and 37 staff completed surveys. Two IIBA board members served on the Strategic Planning Committee; one board meeting focused on strategic planning; and eight board members completed surveys.

External Stakeholders

Forty external stakeholders were engaged in the development of the strategic plan via one-on-one interviews and small focus groups, including current and former clients and volunteers, pro bono attorneys, funders, individual donors, peer organizations, and external consultants.



Left: IIBA staff at a strategy meeting in 2019.

STRATEGIC PLAN 2021-2023

Leverage IIBA's core strengths to meet clients' immigration legal service needs.

Diverse stakeholders rely on IIBA to deliver high quality, low cost immigration legal services with a client-centered approach, particularly on affirmative matters. To connect with those most in need, outreach efforts will target underserved populations and geographies. Additionally, pro bono attorneys, law school students, fellows, and volunteers will be engaged to expand organizational capacity.

Objectives	Actions and Impact Measures
<p>Deliver high quality, low cost immigration services that clients value and upon which peer organizations rely, including citizenship services, DACA applications and renewals, family reunification, humanitarian services, and removal defense</p>	<ul style="list-style-type: none"> • Outreach to at least 10,000 individuals with information about legal rights and changes to immigration law • Conduct a minimum of 3,500 intakes • Represent 2,500 clients in affirmative immigration cases • Represent 100 clients in defensive immigration cases • Administer client surveys and/or focus groups in which 90% of respondents indicate they are satisfied or very satisfied with IIBA's services
<p>Bolster outreach to underserved communities, including Black and Indigenous immigrants</p>	<ul style="list-style-type: none"> • Partner with at least four organizations that serve Black and Indigenous immigrants to better understand the needs of the communities (Y1) • Provide immigration legal services and education and outreach based on identified needs (Y1 and Y2)
<p>Increase the existing pool of law firm partners to help meet the demand for IIBA's legal services</p>	<ul style="list-style-type: none"> • Build relationships with six new law firms • Train at least 200 new pro bono attorneys • Conduct a minimum of 20 workshops, where pro bono attorneys assist 250 clients • Build a core team of pro bono volunteers to mentor newer pro bono volunteers • Hire a Pro Bono Manager who will lead the expansion of pro bono partnerships
<p>Expand IIBA's capacity to deliver high quality, culturally competent immigration legal services by training a diverse pool of future lawyers</p>	<ul style="list-style-type: none"> • Hire a Pro Bono Manager who will take a lead role in expanding and building relationships with law schools • Partner with a minimum of eight law schools and fellowship programs • Train at least 35 fellows and law students, of whom 50% identify as BIPOC and 70% are bilingual • Place 20 law clerks with IIBA • Place four fellows with IIBA
<p>Engage IIBA volunteers to provide a wide range of client-centered services and to amplify IIBA's outreach efforts</p>	<ul style="list-style-type: none"> • Develop an agency-wide volunteer program including a training curriculum (Y1) • Deliver the training curriculum to at least six volunteer cohorts (Y2) • Facilitate a minimum of 4,000 volunteer hours delivered across the organization

Extend IIBA’s geographic reach via **remote service delivery**.

During the COVID-19 pandemic, IIBA honed its ability to serve clients remotely and is well positioned to pilot a virtual service delivery model in other areas of the state.

Objectives	Actions and Impact Measures
<p>Leverage key lessons gleaned from working remotely to improve workflow and serve clients beyond IIBA’s brick and mortar locations</p>	<ul style="list-style-type: none"> • Solicit input and identify best practices for remote service delivery from staff and partner agencies (Y1) • Codify and document key lessons in agency-wide practices and procedures (Y2)
<p>Develop and launch a pilot project to help address technological barriers and serve clients who have limited or no access to immigration legal services</p>	<ul style="list-style-type: none"> • Establish relationships with at least two Family Resource Centers or community-based organizations to develop the pilot project • Engage at least 500 individuals through remote outreach and education efforts • Conduct a minimum of 100 intakes
<p>Evaluate the impact of the pilot project to determine whether and how to continue and expand remote legal services</p>	<ul style="list-style-type: none"> • Administer a client survey and conduct client focus groups in which 85% of respondents indicate they are satisfied or very satisfied with IIBA’s services, and 75% of respondents indicate that technological barriers did not impede their ability to access services • Solicit feedback from IIBA staff and partner organizations assessing the efficacy of the service delivery model, identifying lessons and best practices, and making recommendations for future efforts (Y2)

“ I appreciate the fact that IIBA has opened offices in places where there is little infrastructure. That risk-taking—not just staying in urban core areas—sets them apart.”

—Navin Moul, Program Executive, Zellerbach Family Foundation

Increase civic literacy among citizenship applicants.

For generations, IIBA has helped immigrants become U.S. citizens, thereby gaining the much-celebrated right to vote. Yet, electoral participation is but one aspect of civic life. Therefore, IIBA will help prepare clients to exercise the full spectrum of rights and responsibilities that accompany citizenship, primarily via its citizenship class curriculum.

Objectives	Actions and Impact Measures
<p>Expand IIBA’s citizenship class curriculum to include a civic literacy component, emphasizing practical knowledge and skills as well as current social issues, such as the movement for racial justice and equity</p>	<ul style="list-style-type: none"> • Develop civic literacy curriculum (Y1) • Offer curriculum to all citizenship class participants (Y2) • Administer a content-based assessment of civic engagement knowledge (Y2) • A minimum of 50% of students tested will demonstrate learning gains (Y2)
<p>Host representatives from partner organizations focused on civic engagement to make presentations to IIBA citizenship classes, inviting students to join these organizations’ efforts</p>	<ul style="list-style-type: none"> • Invite four to six civic engagement organizations to present to citizenship students (Y1) • Host civic engagement organization presentations in citizenship classes a minimum of ten times (Y2) • Connect up to ten students with partner organizations for further engagement (Y2)
<p>Upon graduation, provide IIBA citizenship students with a toolkit focused on civic responsibilities and engagement opportunities</p>	<ul style="list-style-type: none"> • Develop a citizenship class graduation packet (Y1) • Distribute packets to all students upon graduation (Y2)

“ They have a strong reputation as a service provider with the ability to pivot and do new things. They are trusted, a resource, and a part of the ecosystem.”

—Patti D’Angelo Juachon, Program Director, Environment and Legal Services, Marin Community Foundation

Elevate IIBA’s advocacy role and explore related leadership and civic engagement opportunities for IIBA clients.

IIBA operates in a highly volatile policy environment that requires ongoing monitoring to ensure the needs, concerns, and rights of immigrants are considered and protected. Diverse stakeholders, including policymakers, elected officials, and peer organizations, look to IIBA to share expertise grounded in direct experience with clients. IIBA will identify mission-aligned opportunities to elevate and facilitate client leadership in these spaces.

Objectives	Actions and Impact Measures
<p>Expand IIBA’s role beyond individual client advocacy work to provide an on-the-ground perspective to public officials and decision makers</p>	<ul style="list-style-type: none"> Engage with peer organizations, policy makers, elected officials, agency officials, and other stakeholders in advocacy and coalition-building efforts Provide a minimum of two advocacy training opportunities for staff (Y2)
<p>Develop an organization-wide strategy to facilitate client participation in advocacy spaces</p>	<ul style="list-style-type: none"> Form an advisory group to help guide IIBA’s efforts to include clients in advocacy work Ensure that at least 50% of the advisory group is comprised of IIBA clients or former clients, representing all regions served by the organization Provide a minimum of two advocacy training opportunities to clients (Y2)
<p>Bolster staffing to implement these objectives, using agency reserves in the short term and engaging in fundraising efforts for the long term</p>	<ul style="list-style-type: none"> Designate a staff member to lead efforts to advance this goal

“ IIBA is like a Swiss Army Knife for people who need advice, guidance, and advocacy.”

—Rich Kelley, Individual Donor

Standardize operating procedures across the organization.

With eight physical locations, IIBA reaches diverse populations of immigrants across the Bay Area, tailoring services to meet local needs. Now it is critical to establish and maintain common systems and procedures across the organization, informed by the lessons and best practices that emerge from individual offices.

Objectives	Actions and Impact Measures
<p>Identify and launch a new case management system</p>	<ul style="list-style-type: none"> • Create protocols for IIBA’s new case management system • Develop a training curriculum and plan for implementation • Train all staff on the new system
<p>Finalize and implement standard operating procedures (SOPs) across all offices</p>	<ul style="list-style-type: none"> • Create SOPs to be adopted organization-wide • Develop an SOP training curriculum • Identify staff who can play a role in training and implementation efforts • All staff complete SOP training appropriate for their roles
<p>Integrate IIBA’s administrative systems (case management system, fundraising database, and volunteer database) to streamline agency-wide data collection and enable analysis of impact, trends, and outcomes</p>	<ul style="list-style-type: none"> • Identify systems that will support integrated data collection • Establish written protocols for data entry • Train staff to ensure adherence to established protocols

“ IIBA continues to address the needs of immigrants in an ever-changing landscape. They have expanded to rural areas where access to reputable and affordable legal services was limited or did not exist. They continue to be “forward thinking” in their approach to service delivery and are collaborative, effective and innovative, motivated by a commitment to making a difference.”

—Leslie Dorosin, Co-Executive Director of the Grove Foundation

Strengthen organization-wide training and professional development opportunities.

IIBA has been successful in attracting qualified and committed staff who share a strong sense of mission and collective purpose. By establishing and sharing training and professional development goals and benchmarks for all job categories, IIBA will enable staff to understand their individual potential for growth within the organization, while developing strong leadership for the future of the organization.

Objectives	Actions and Impact Measures
<p>Ensure that IIBA staff have the opportunity to discuss and realize professional development goals through mentorship and training</p>	<ul style="list-style-type: none"> • Conduct an organization-wide survey to identify specific training and professional targets by job category • Allocate funds for each staff to pursue their professional development goals
<p>Develop succession plans for each level of the organization to ensure seamless transitions and to safeguard institutional knowledge</p>	<ul style="list-style-type: none"> • Develop a succession plan for all key positions of the organization • Share relevant information and relationships with key staff on a regular and ongoing basis • Document all relevant organizational information to ensure continuity of operations

“ IIBA is one of the most effective and powerful organizations that I know helping some of our most vulnerable community members, immigrants and refugees. I think it is really important to support the organizations that are doing that on all of our behalf, and IIBA is definitely one of those and one of the most effective.”

—Carol King, U.S. Immigration Judge (retired)

Advance diversity, equity, and inclusion (DEI) work with staff, board, and executive leadership.

IIBA will continue to engage in courageous and purpose-driven DEI-related conversations and analyses, the outcome of which will influence multiple facets of IIBA’s operations, from recruitment and hiring practices to employee and client feedback and engagement. Ultimately, IIBA’s DEI work will seek to inform its efforts in all spheres, but particularly those that acknowledge the role of structural racism in society, including the U.S. immigration system.

Objectives	Actions and Impact Measures
<p>Provide DEI training for the board of directors and create a DEI committee of the board to advance IIBA’s commitment to equity and inclusion</p>	<ul style="list-style-type: none"> • Complete IIBA’s DEI training for all board members • Form DEI Board Committee (Y1) • Establish board goals for DEI, with a particular focus on board recruitment and retention (Y1) • DEI committee reviews and provides input to policies and procedures as it relates to IIBA’s hiring, recruiting, and opportunities for advancement (Y2)
<p>Provide DEI training for staff and create a DEI staff committee</p>	<ul style="list-style-type: none"> • Complete DEI training for all staff • Form DEI staff committee to act as thought partner with senior management to improve DEI-related practices (Y2)
<p>Assess organization-wide practices through a DEI lens, including recruitment, hiring, opportunities for advancement and leadership development, outreach strategies, and program design</p>	<ul style="list-style-type: none"> • Engage a consultant to develop a plan to incorporate DEI goals into all relevant areas of the organization (Y1) • Implement plan (Y2)

“ IIBA is a long-time leader and partner in the San Francisco immigrant rights community. They are a skilled, thoughtful partner and diligent collaborator committed to bringing high quality services to the most vulnerable members of our immigrant community. We are incredibly grateful to be able to rely on the leadership and fortitude of IIBA during such tumultuous times.”

—Richard Whipple, Deputy Director - Programs,
San Francisco’s Office of Civic Engagement & Immigrant Affairs

Elevate IIBA’s visibility to **maintain a diversified resource base** and ensure the organization’s long-term financial stability.

Over the past 5 years, IIBA has strengthened its financial position significantly, including increasing government funding by 38% and individual giving by 72%. However, the uncertainty posed by the current economic environment will require sustained efforts to raise unrestricted funds as well as identify new sources of organizational support.

Objectives	Actions and Impact Measures
<p>Advance strategies to increase unrestricted financial support</p>	<ul style="list-style-type: none"> • Increase support by directly engaging small cohorts of individual donors, seeking support from law firms participating in pro bono clinics, and developing a campaign to solicit modest donations from former IIBA clients • Increase support from individual donors by 25% (Y2) • Increase the number of clients supporting the work of IIBA • Increase support from law firm donors by 25% (Y2) • Develop a major gifts program
<p>Expand IIBA’s development team to include a Development Director</p>	<ul style="list-style-type: none"> • Hire an experienced Development Director with years of fundraising and related communications experience
<p>Ensure that IIBA’s work and leadership are visible to key stakeholders, including funders, donors, and public officials</p>	<ul style="list-style-type: none"> • Develop a list of key stakeholders to engage and strategies to increase IIBA’s visibility with different audiences • Track engagements with identified stakeholders and report on the impact of these efforts
<p>Foster a culture of philanthropy across the agency. Engage board and staff as agency ambassadors supporting fundraising efforts, as appropriate for their positions</p>	<ul style="list-style-type: none"> • Increase IIBA’s social media engagement by 30% and increase IIBA’s visibility by increasing our radio and TV appearances by 25% • Increase number of subscribers to IIBA’s newsletter and number of participants at IIBA’s Comedy Night and other events

“ IIBA’s clinics are run so well. They have the process down pat and that’s why we go back to them every year.”

—Hanh Vo, Vice President, Head of Commercial Legal, LinkedIn

BOARD OF DIRECTORS

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Antoine Orard
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Steve Herman
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Secretary

Rodrigo Davies
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Anne Peskoe
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Executive Director

Sheryl Muñoz-Bergman
Deputy Director

Catherine Seitz
Legal Director

Dekri Vonan
Director of Finance
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Mary Robbins
Director of Human Resources

Madeline Hernandez, Esq.
North Bay Regional Director

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Alameda County
Regional Director

Virginia Abbott, Esq.
Program Director,
San Mateo County

Juan Ortiz, Esq.
Program Director,
Contra Costa County

Justin Skinner, Esq.
Program Director,
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Sergio Garcia
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Isabel Guerra
Paralegal

Vanessa Hatfield
North Bay Program
Coordinator

Eesha Hernandez
CDSS Project Coordinator
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Leslie Hernandez
Paralegal

Diamante Kasso
Staff Attorney

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IIBA OFFICES

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Established 1918

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Oakland Office

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Redwood City Office

Established 1974

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Brentwood Office

Established 2012

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Napa Office

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Redwood City Satellite Office

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Sonoma Office

Established 2017

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IIBA'S IMPACT IN THE WORDS OF OUR CLIENTS

“ IIBA has really helped because when I came here and talked to the legal team, they said we are going to do whatever it takes to reunite me with my children.”

“ Without IIBA, none of this would have been possible. It's because of IIBA that I was able to attend university. It is because of IIBA I was able to pursue my career.”

“ Without IIBA, I wouldn't be here right now telling my story and that I am a citizen.”

“ I was so lucky to find IIBA. It is so encouraging to see all the work that IIBA does to help the community and to know that there are people there to support you and help you along the way.”

“ It's reassuring to know that an agency has your back and respects you as a person.”

“ IIBA gave me a sense of belonging in the U.S.”

“ I wouldn't have known where to start if it wasn't for IIBA.”



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of the Bay Area**

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