CONEC Volunteer Matching with Legal Service Providers

Background
In early 2013, with Comprehensive Immigration Reform (CIR) looming on the horizon, Silicon Valley Community Foundation launched a technology innovation project to support the technology needs and aspirations of immigration legal services providers in San Mateo and Santa Clara Counties in California. The effort was envisioned as an opportunity to engage a cohort of agencies in a unique co-creation process exploring the use of technology to enhance citizenship and naturalization services for immigrants in Silicon Valley.

In addition to supporting organization capacity building, the project was designed to:

- Catalyze and strengthen the community of practice working on technology to enhance the work of legal services providers and to honor the grassroots leadership that is driving the same;
- Work toward shared language and shared understanding around relevant technology; and
- Develop a successful model of community-driven tech innovation for adoption by other foundations.

The anticipated outcomes of the project included:

- A deeper understanding of what is working and what is still needed in terms of technology assistance, building on excellent work and research done to date;
- An understanding of the challenges and issues associated with any new technology interventions, with a particular focus on privacy, literacy and digital access constraints;
- One or more technology tool prototype(s) and an action plan for further development and implementation by legal services providers and partners; and
- A report with actionable steps for implementing successful tech innovation and adoption programs by foundations.

The expected practical benefits of the program for participating agencies would be:
1) Improved client services due to streamlined and standardized systems and processes; and
2) More timely support for immigration reform efforts.

Importantly, the entire initiative was designed in a collaborative and transparent fashion to invite participation and contributions from those interested in exploring and improving the state of technology for the legal services community.

Process
The project was conducted over a 20 month period, beginning with visioning and planning in January 2013 and culminating with the public launch of the CONEC volunteer matching site in early September 2014.

The project would happen in three distinct phases:

> Stage 1 – Idea Jam: A full-day convening with legal service providers, foundation supporters, and immigration reform leaders, to imagine and define potential tech solutions and associated strategic resources.
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> Stage 2 – Design Sprint: A full-day building session involving Idea Jam participants, allies, strategists, tech developers and target users. Potential outputs include working prototypes, associated documentation, reusable strategy and process templates, and ongoing collaborations.
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> Stage 3 – Deployment and Iterative Development:
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> - Field Implementation: A three month technology tool refinement and testing period involving service providers and technical experts; and
> - Innovation Lab Development: Creation of a tech innovation program for ongoing tech training, leadership development, tool building, and field-based testing and implementation.

The entire process was intentionally fluid, with an agreement to avoid prescriptive measures and the tech-centric model common with many current technology innovation efforts. The approach contrasted with that used with a hackathon, for example, where a rapid design and build process unfolds with limited user input over a set one-to-three day period. SVCF adopted an experimental, people-centric technology development strategy without rigid time constraints.

Measuring Success
Cohort Survey Results

In mid-January 2015, the legal services cohort was surveyed to determine their overall attitudes toward the innovation project process and the CONEC volunteer platform produced. All 15 cohort members participated in the survey, and the results were largely positive. 87% of participants polled responded that the project generally or fully met their expectations and slightly over two thirds (67%) felt that SVCF should continue to invest in similar tech innovation efforts. An equal percentage of participants indicated they would be interested in participating in other tech-related projects. The survey respondents overwhelmingly endorsed the co-design approach and expressed a high level of satisfaction with their role in driving the project. They also expressed appreciation for the unique opportunity to work with their colleagues directly to determine relevant tech solutions.

When asked "what did you learn?" from the overall experience, one survey participant responded that, "...cooperation and collaboration among organizations and networks benefits the needs of those organizations and networks, and allows for one tool/solution to be found instead of trying to re-invent the wheel."

There were also some criticisms of the project, particularly regarding the CONEC platform. Some individuals indicated that the CONEC solution is not sufficiently user friendly, and, in some cases, the use of CONEC actually conflicts with or complicates the use of pre-existing agency volunteer recruitment program approaches and tools. One survey participant remarked, "Google Docs is way easier and more efficient to use. It allows us to track all of our volunteers without signing in. There needs to be more flexibility so that we can attract volunteers using both CONEC and other sources." There was also some confusion among individual agencies as to whether CONEC could be used for non-immigration programs within an agency and a concern about the challenge of having to adopt multiple volunteer recruitment platforms for different volunteer programs within a single organization.

There were mixed responses to the question of whether collaboration had improved as a result of the project, but many individuals indicated that a high degree of collaboration already existed when the technology initiative began. There were also mixed responses to the question of whether the project led to increased capacity and efficiency within individual organizations with the majority of respondents indicating that they were "not sure" or that it was still too early to tell.

Finally, there was general acknowledgment and appreciation of the importance of implementing a dedicated and intensive technology design process with an emphasis on users and not the technology. One survey respondent commented that "one of SVCF's principal contributions in this has been to engage end users in a process...of a comprehensive study of the program need, what potential end users require to make the tech solutions useful and viable. The stress on the human design process is a huge learning."

CONEC Use

The primary quantitative measures for CONEC success are the levels of site adoption and active use by CONEC member agencies and individual volunteers. In order to evaluate site activity, a benchmarking tool was devised which measures results against baseline numbers and quarterly targets.

As mentioned above, CONEC officially launched during the first week of September 2014, following a press release issued by SVCF. By the end of September, 85 volunteers had registered on the site. Surprisingly, the number of volunteers registering on the site did not increase significantly following the announcement by President Obama on new immigration reform efforts at the end of November 2014. However, the number of registered volunteers on CONEC has increased steadily through Q4 2014 by 62%, totaling 139 users. The current target is 200 registered volunteers by the end of Q1 2015 and 500 by the end of 2015.

In Q4 2015, 59 individuals (42% of registered users) completed a volunteer opportunity through CONEC with a total of 269 volunteer hours donated. While the aggregate and frequency of use numbers are still somewhat low at present based on the number volunteer opportunities available, it is expected that site activity will increase significantly once additional marketing and outreach efforts are implemented. The pace and scope of immigration reform over the near term will also be a strong influencing factor.

Lessons Learned
The following lessons learned have been derived from the above cohort survey and CONEC use results along with targeted interviews with SVCF staff, immigration and legal services cohort members, CONEC technical and community coordination staff, project consultants and a site-registered volunteer.

General learnings:

- Co-creation: Project participants across the board felt that the co-design and co-implementation approach involving the full cohort was effective and yielded good results. As expressed by a project consultant, "by creating shared language and vision we were able to shrink the complexity of deliverables and maximize investment." One common regret was that a critical end user community, the volunteers themselves, were not directly involved in the design and testing process.

- Community engagement: Cohort members were actively and consistently involved in the process through group convenings, on-going cohort meetings, periodic interviews and product testing, resulting in increased buy-in. Full involvement was also the result of a requirement for participation as articulated in cohort member grant agreements with the community foundation. In instances where full cohort involvement did not occur (e.g. CONEC branding), some dissatisfaction resulted. In addition, while some grantees expressed a challenge with fulfilling their expected time commitment for the project, there was a general understanding of the importance of active and sustained involvement.

- Community investment: More than just an exercise in technology tool development for community foundation grantees, the technology innovation initiative resulted in the development of a comprehensive community engagement and project stewardship "package." The package includes financial and time investments in design methodology, on-going cohort convenings, formal feedback loops, and broader tech and legal services community engagement. This holistic approach was endorsed by the full range of participants.

- Leadership: The assignment of a community coordinator from the cohort proved to be another effective way to engage the individual agencies, support their needs and increase

buy-in by the cohort. Strong community foundation leadership and involvement, and the assembling of a project planning team with clearly defined strategic and support roles made for a more efficient and effective project implementation.

- Timeline: Notwithstanding the fact that effective co-design processes take time, it was not anticipated that the project would last 20 months - from visioning to tool rollout. The extended timetable was in part due to insufficient (in-house) staffing, adoption of an experimental and open-ended approach, the lengthy process needed for full cohort engagement and input, and scheduling challenges with the project team.

CONEC Specific learnings:

- Tool adoption: The use of CONEC varied from cohort agency to agency, depending on factors such as the size of agency and availability of volunteer management staff, the need for volunteers and the reliance of pre-existing tools for volunteer recruitment. Some agencies post numerous volunteer opportunities and participate actively in joint volunteer events, while others will have no volunteer needs at all. Additional thought should be given to better addressing individual agency needs and expectations for mandatory adoption by all cohort members.

- Target users: It was not discussed until the tool was actually rolled out whether CONEC could be used for non-immigration volunteer recruitment. Some agencies were expecting or hoped to use the tool for general recruitment purposes. Ideally this discussion should have been held earlier on in the process and a clear determination made.

- Marketing support: The cohort has expressed a strong interest in getting additional marketing support from the community foundation, claiming a lack of bandwidth, expertise and resources to conduct effective outreach to potential volunteers. Many believe that marketing is a major factor in project success and needs to be more fully addressed.

Recommendations & Next Steps

Based on project results and learnings, below are a number of considerations and suggested action items both for CONEC and any additional technology innovation work undertaken by SVCF.

1. ***Explore options to expand the use of or replicate CONEC***. The existing CONEC platform is easily scalable or can be replicated for use in other geographies, regionally or nationally. Certain cohort members have expressed interest in scaling opportunities.

2. ***Convene a community foundation tech innovation working group*** comprised of grantees, foundations, and technology and community technology experts to generate new ideas and share resources.

3. ***Provide dedicated staffing support*** such as a full-time Director of Technology Innovation who can manage current and future projects of the community foundation, and help to identify the critical needs and opportunities of grantees.

4. ***Present the project results*** at funder and tech innovation conferences to generate additional interest and funding support, and to offer up a new model for tech innovation in the community foundation community.

Conclusion

While full validation of the SVCF investment in CONEC remains to be seen, the project has met two critical objectives: 1) It has successfully engaged the immigration and legal services cohort in a collaborative technology design process, and 2) It has produced an effective technology solution to address the broader needs of the group within the context of CIR. In addition, a community of practice with a shared language has been successfully created and a new model for technology innovation for the community foundation community has been established.

Moving forward, CONEC can be easily leveraged for use in geographies outside of San Mateo and Santa Clara counties. Other organizations locally and nationally have already expressed interest in adopting CONEC for their own immigration-related volunteer recruitment purposes.

Immigration reform will only spur greater interest in and the need for CONEC and other capacity building tools. With a technology innovation blueprint in hand, the community foundation is well positioned to guide or directly pursue the collaborative development of these tools for immigrant-serving organizations that, now more than ever, need the support.