

# BEST PRACTICES TOOLKIT

*Characteristics of a Successful Site Leader*

## BEST PRACTICES DEFINED

Best practices are operating processes that produce consistently better results than other techniques. We glean best practices from the good practices of frontline organizations, and improve them through reflection, feedback, and experimentation. Best practices may be born through the efforts of one community and transformed when they are adopted by others in a new context, but the underlying understanding of their utility remains constant and is always measured against desired results.

### ABOUT THIS SERIES

Identifying and spreading best practices requires a learning network for peer-to-peer exchange of ideas. This toolkit series serves as one mechanism for us to share and build on best practices.

### ABOUT THIS TOOLKIT

The New Americans Campaign's unique structure uses site leaders to lead the campaign in each community. This toolkit illuminates the characteristics of a successful site leader, so that collaborations can appropriately choose which organization, and which person within that organization, should serve as the local site leader.

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## LEADERSHIP

Leadership involves influencing and mobilizing others to maximize efforts to tackle tough problems and achieve a goal. Effective leaders are critical to a project's success. Leaders possess not only good analytical and technical skills, but also high emotional intelligence: the ability to manage themselves through strong self-awareness, self-regulation, and motivation, and the capacity to relate to others, through empathy and social skills.

## ATTRIBUTES OF SUCCESSFUL SITE LEADERS

*Site leaders successfully direct their collaborations by being...*

### **Strong coordinators and facilitators**

Site leaders need to effectively coordinate events and meetings. They need to comfortably navigate logistics, prepare and plan, and be flexible when plans change.

*“Important site leader qualities...include being open to communication, accessible to other partners, and flexible.” – Dallas site leader*

### **Confident, fair decision-makers and negotiators**

Coordinating a collaboration necessitates many decisions, and requires assertive, yet compassionate, negotiation skills. Issues of deadlines, numbers, costs per application, processes at group workshops, and schedules appear regularly in collaborative work, and effective site leaders tactfully navigate them. Objective, balanced judgments show the collaboration that the site leader is an unbiased partner.

*“Site leaders do not take sides.” – NY site leader*

### **Reliably high performers**

Site leader organizations must consistently meet their individual organization’s application goals, so that they stand as a model for the collaboration. This does not necessarily mean the organization must be the highest producer of applications; performance and quality of applications are as important as quantity.

*“It’s hard to lead if you’re lagging behind.” – Detroit site leader*

### **Trusted and respected leaders**

Partners need to know their site leader can be consistently called-on to perform the duties they are assigned, and to support their team. They will respect the authority of the site leader when the site leader can demonstrate follow-through on their agreements and quick response times to questions.

*“[Site leaders] need to...keep people informed, respond to calls and emails, and show partners that they’ll get an answer. Follow-up is important.” – Miami site leader*

### Knowledgeable resources

 Site leaders must be knowledgeable about the naturalization process. Because naturalization is a legal process, local collaboratives need to be able to produce high quality legal information. This does not mean the person functioning as the site leader needs to be a lawyer or BIA-accredited representative; access to legal resources for the collaboration is the key.

*“Site leaders have to make a lot of decisions. When on site at a large workshop, it’s important to know the forms and the law so that you can make practical decisions.”* – San Jose site leader

## ACTIONS OF EFFECTIVE SITE LEADERS

*Site leaders steer their collaborations toward high achievement when they...*

### ✓ Meet regularly to share learning

Collaborations benefit from meeting monthly, in person if possible. During these meetings, partners can then stay in touch with each other's activities by sharing naturalization related information, work plans and best practices. This can help collaborations coordinate timing, location, and staffing of naturalization events, as well as improve processes at events.

*"We also share work plans among organizations. Because we are spread out geographically, it's good to see where organizations are doing events in similar neighborhoods."* – LA site leader

### ✓ Get to know their partners

Site leaders cannot coordinate unless they understand how their partners work—where they excel, and what resources they lack. One way of getting to understand each other is through formal assessment tools. Using this knowledge, site leaders can help partners allocate tasks to appropriately utilize each partner's assets.

*"Effective delegation also includes knowing the strengths and weaknesses of organizations, so that you know to whom you should delegate."* – Dallas site leader

### ✓ Foster personal and professional connections

The best site leaders foster personal as well as professional relationships. Members of collaborations work best together when they can get to know each other through casual networking opportunities.

*"Every other month, we have a casual meeting at a restaurant so that we can get to know each other and build relationships. It's not just all about numbers."* – Houston site leader

### ✓ Provide space for individual communication

Site leaders should leave space for individual conversations with local partners, in addition to group meetings.

*"Building relationships through one on one conversations ensures success, and allows space for partners to share any individual concerns that they might shy away from sharing in a group."* – Detroit site leader

### ✓ Promote collaboration and buy-in

A collaborative works best when all partners work together as a team. Site leaders can encourage partner buy-in by involving partners in decisions, planning, and

*"It is best to rotate drafting the agenda for the meetings, rotate the location of the meetings, and, where possible, rotate leading the discussions."* – East Bay site leader

operational tasks. By asking partners to participate, they encourage collaboration and ownership of goals.

✓ **Move from competition to cooperation**

The site leader position is never to be used for self-promotion of an organization. Rather, it empowers the site leader to bring partners together in pursuit of collective goals, and away from competition against each other. Site leaders can help solidify the group by considering the needs of the collaboration first, and encouraging partners to do the same. For example, site leaders can encourage expense planning that will benefit all, such as costs for media outreach and venues being set aside in early planning stages so that no single agency's budget will need to be strained.

✓ **Leverage community connections**

An organization with existing community connections is a good choice for a site leader, as those relationships can be leveraged to benefit the whole collaboration.

✓ **Motivate toward goals**

Effective site leaders are constantly aware of individual and collective goals of the collaboration. They motivate partners by updating them on their progress and keeping them, and the collaboration, accountable for their deliverables.

✓ **Celebrate achievements**

The best way to ensure continuous success is through maintaining momentum. Successful site leaders build in time for celebration at key milestones in the campaign.

*“It’s always helpful to be a mediator; to be looking out for the best interests of other organizations instead of your own. It’s important to make sure that everyone gets along.”*

*– Houston site leader*

*“If a site leader has a long presence in a community, that helps bring the community together and helps direct organizations to the right resources.”*

*– Orange County site leader*

*“A site leader needs to have a very good idea of the goal and how it will be attained.”*

*– NY site leader*

*“It works best if you can make meetings motivational and fun.”*

*– Detroit site leader*

## MODEL LANGUAGE

### RESPONSIBILITIES OF SITE LEADERS

*The language that follows may be incorporated into MOUs with site leaders*

#### What is the Role of the Site Leaders?

Within the framework of a national campaign, site leaders are trusted partners who serve as the point person(s) for the local naturalization collaboration; provide leadership to the group; hold, conduct and host meetings; help national partners conduct trainings in the region; develop benchmarks and a plan for joint activities in their local area with input from all partners; share local events on a centralized calendar; and maintain a local collaboration contact roster. The same organization may serve as the site leader for more than one year or the local collaboration may rotate site leader from year to year.

#### More specifically, the site leader will:

##### *Communication*

- Serve as the primary contact for their local naturalization collaboration to the campaign's national partners.
- Assist national partners and the lead agency in learning about the development of the site's collaboration and collaborative projects, and provide national partners and the lead agency with periodic [monthly and quarterly] updates on all site activities.
- Use best efforts to participate in the campaign's media work, highlighting the work of all partners.

##### *Planning and Leadership*

- Provide leadership to the local collaboration by adhering to and making best efforts to follow the campaign's four guiding principles of: Impact, Collaboration, Innovation, and Diversity.
- Work with the local collaboration's partners to develop benchmarks and a plan in their local area that includes at least four joint, collaborative events per year and other joint activities. Joint activities include centralized resources for trainings, group processing events, shared referrals, combined media events, joint identification and recruitment of other members and volunteers, co-creation of resources, shared cases, and co-representation.

### *Local Coordination and Collaboration*

- Coordinate, cooperate, and collaborate with all of the local partners who are part of their local naturalization collaboration.
- Organize, host, and conduct a minimum of six regularly-held local naturalization collaboration meetings as well as conference calls as needed.
- Convene and coordinate local partners to share ideas for best practices, gather helpful resources, facilitate the creation of coordinated resources, events, and other materials that would be helpful to others in either the local site or the national campaign; and make these findings available to others in the site and at the national campaign level through in-person meetings, webinars, convenings and/or on-line tools like the campaign's Ning (networking platform) or website, and other online resources.

### *Membership*

- Compile, maintain, and update a local naturalization collaboration contact roster that includes all partners' contact information. The roster must include the names, addresses, telephone numbers, and email addresses of all participating site-based partners.
- Recruit organizations into the local collaboration and educate them on the benefits of collaboration membership, such as free technical assistance and training on naturalization matters.

### *Goals, Reporting and Evaluation*

- Use best efforts to ensure partners reach their collaborative and individual goals of application completion.
- Support, encourage, and coordinate with partners to participate in the evaluation of the campaign.
- Provide national partners and the lead agency with quarterly reports collected using the campaign's official reporting forms.

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