



Engaging and Developing Prospective and Current Board Members

By Kate Marr, Executive Director,¹ Community Legal Aid SoCal

After I began serving as Community Legal Aid SoCal's (CLA SoCal) executive director in 2017, among the first items to which I directed my attention was the



board of directors. I learned there was no intentional process to recruit prospective board members or methods to engage them and current members. As a result, engagement varied widely with a handful of very active directors and many disengaged

directors. Board committees existed in name only, with the exception of the executive committee where most major decisions were made. There was minimal activity by board committees, with the majority of work done in support of the annual fundraising event.

As a first step, we began looking at board governance. In 2017, we completed a full revision of the board's bylaws, which were outdated. As part of the process, we instituted term limits, which made way for a new crop of engaged board members. Additionally, we created a leadership ladder that provided a path for new leadership on the board.

With the new bylaws in place, we turned our attention to developing best practices for board engagement and creating a culture of ambassadorship and fundraising on the board. At the time, CLA SoCal (then known as the Legal Aid Society of Orange County) didn't have a director of development. In fact, a grants manager was the only development professional we had on staff in 2018. It was apparent to me that in order to establish new and best practices to carry out changing the culture on the board, a critical step I would have to take was to hire a director of development with whom I could collaborate. Together, we would create the infrastructure needed to thoughtfully recruit and develop relationships with potential board members and to

keep the current membership interested and engaged in our mission.

It was clear there was a lot of work to do in order to bring what we needed to reality. I set my priorities, and by spring of 2019 we hired a director of fund development, Emily Wing, who has years of experience working with high-performing boards.

Emily and I spent a good deal of 2019 and 2020 developing and establishing the process and protocol. At the time, we were also finishing up the restructure and rebranding of the program. During the restructure, we updated our mission statement and adopted a set of organizational values (accountability, collaboration, compassion, equity, and trust). As such, it was critical for us to approach the process and what we wanted to accomplish with the values in mind. In 2020, we also began work on our program's commitment to our Justice, Equity, Diversity, and Inclusion (JEDI) initiative, and so it was imperative that this also inform our objectives.

We formed a nominating committee composed of eight board members, with one of them serving as the chairperson. Members of the committee are responsible for bringing forward names of potential board members and reviewing the prospect's professional affiliation and background — evaluating if they are from a big firm, a boutique firm, or in-house counsel and how they would be additive to the current

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membership. Besides board slots filled by attorneys, we have a small number of at-large positions. Those slots are filled by members who have a professional background in areas such as finance/accounting or marketing. In line with our commitment, we are mindful to use a JEDI lens in our consideration of all prospective board members.

Starting with the basics, we compiled a **board orientation package** that includes:

- CLA SoCal history
- History of legal aid in the U.S.
- Overview of CLA SoCal's services and service delivery model
- Overview of CLA SoCal's finances
- Board duties
- Pro Bono opportunities

Board Mentoring

The first few months of a new board member's tenure are critical to bringing them into the stream of board activities and duties. We began a board mentoring program designed to help integrate and engage new board members, offering them support as they get acquainted with the other members and assignments. The program matches an incoming board member with an experienced member who then serves as mentor. Mentors check in with the new member before their first meeting and in-between meetings to gauge how they are doing and to check in about committee assignments. This could last for just a few months or longer if the mentee desires.

Board Retreat

We implemented an annual board retreat. The retreat is dedicated to giving board members time to reflect and contribute to non-governing issues like strategic planning and ways to improve as a board. Topics at our last retreat included:

- How to be an ambassador for the program, which includes creating an elevator pitch
- Prospecting, including how to engage peers

Prior to the board retreat we ask board members to complete a **self-evaluation survey**. In measuring their own effectiveness, the members and the whole body of the board can see how close or far they are from the expectations they have set. The self-evaluation can help to identify specific issues that need clarification, gaps in skills the board member needs to be successful, and topics for future board education.

Two key takeaways from both the board retreat and

the surveys were that board members wanted:

1. More connection to the day-to-day work of the organization
2. To be engaged at a more strategic level

At the time, the full board met monthly for an hour. Meetings primarily consisted of report backs from the various board committees. In response to their stated interest and desires, we decided to move to a bi-monthly board meeting and added an extra half hour of time so that the board could tackle a different strategic topic at each meeting. We instituted an every-other-month meeting cadence and developed an annual work plan for each of the board committees (except for the executive committee which continues to meet monthly). We also added a "mission moment" to the beginning of each board meeting where an advocate shares a recent client success story.

Client Engagement Committee

As an LSC grantee, one-third of our board members are client eligible, however once on the board, most client board members did not actively participate. We wanted to find a way to make the board experience more meaningful for our client directors. To better involve them in the planning of our program's goals and objectives, we created a Client Engagement Committee. The Client Engagement Committee members serve a role in the community needs assessment process, one of which we completed last year, and strategic planning, in which we are currently engaged. They also serve as ambassadors in the client community and have participated in social media campaigns that feature board member engagement in our program. This was most recently done last year when our communications staff used the elevator pitches they wrote at the board retreat for posts on social media.

Advocacy Advisory Council

An important entry point and avenue we created for prospective board members is the Advocacy Advisory Council. The Council is composed of a mix of current and potential board members and is led by Sarah Reisman, CLA SoCal's Directing Attorney of Advocacy & Litigation. In addition to Sarah and the Systemic Impact Unit, CLA SoCal's Director of Pro Bono is also involved in the Council's activities.

As background, our Systemic Impact Unit (SIU) advocates for systemic change through impact litigation, policy advocacy, appellate work, and trainings. They also work in collaboration with CLA SoCal's

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substantive units and community partners to identify and address systemic issues impacting vulnerable populations. Much of their work is done together with pro bono partners who share our vision for a better world where equity and justice are not a goal, but a given.

In 2021, looking to go beyond their historic focus on affordable housing and homelessness prevention to address broader problems in our community, Sarah and the SIU team proposed the creation of an advisory group with a wide range of expertise to help evaluate and identify potential litigation, brainstorm creative legal solutions, and provide technical assistance for litigation in process.

They envisioned the Council as a broad coalition of attorneys, stakeholders, and subject matter experts who could identify potential advocacies, advise on litigation strategy, and provide connections and resources. The first members of the Council would come from our board of directors, with the intent to expand over time to include board candidates, other stakeholders, and subject matter experts.

When presented with the proposal, our board was excited, and the Council's first meeting happened a few months later.

The Council meets quarterly and on an ad hoc basis and communicates via email between meetings. Before attending their first meeting, each member signs a confidentiality agreement preventing them from sharing any information discussed at the meetings. Before each meeting, the members receive conflict information regarding potential parties and are asked to clear conflicts and sign and submit a conflict-of-interest disclosure. After submitting their conflict-of-interest disclosure, Council members receive a packet of background material that contains an agenda for the meeting, a summary of the issue or case being discussed, any relevant legal or factual background, and a list of discussion questions.

At the meetings, SIU uses the background material to engage the Council in discussion. As an example, in one of the meetings, SIU and the Council discussed whether SIU should file a discrimination claim on behalf of a CLA SoCal client. At the meeting, discussion topics included weighing different legal strategies, discussing whether and how to engage in media

outreach, and potential additional resources for factual research or legal expertise. The Council members brainstormed additional investigatory research and connected SIU with various factual and legal experts around the county who could support the case. Their broad backgrounds allowed each to approach the case with a different perspective and from unique angles, and they were able to offer new strategic considerations and other ideas on ways to strengthen the case.

The Council continues to be active and, as was intended, there are presently new members of the board of directors who began their relationship with us through service on the Council. In the almost two years since we launched the Council, it has proven to be an effective way to engage potential and current members that they find stimulating and rewarding.

Our efforts to improve board recruitment and engagement have paid off. Board meeting attendance and committee participation are at an all-time high. We have come a long way from my first days at CLA SoCal in so many ways, and board recruitment and engagement can certainly be counted among them. We now have a process and opportunities to engage prospective and current board members that they have reported as personally and professionally fulfilling and through which they are able to support our mission and the communities we serve.

- 1 Kate Marr is the Executive Director at Community Legal Aid SoCal (CLA SoCal), a non-profit agency with a staff of 127, serving Orange and Los Angeles Counties. CLA SoCal fights injustice and advocates for social, economic, and racial equity by providing compassionate, holistic, and impactful legal services. Kate has spent her entire career in legal services, working primarily with survivors of domestic violence, sexual assault, human trafficking, and other forms of trauma. Immediately prior to joining CLA SoCal, Kate was a managing attorney at Legal Aid Foundation of Los Angeles (LAFLA) where she supervised the organization's family law and immigration work and the Greater Long Beach Medical-Legal Partnership. Kate is a past chair of the Los Angeles County Bar Association's Access to Justice Committee and the Vice-Chair of the Board of the Legal Aid Association of California (LAAC). She is also a founding member of LAAC's Inclusion Diversity Equity and Accountability in Legal Aid (IDEAL) Committee. Kate received her JD from the University of Colorado School of Law and her undergraduate degree from Bryn Mawr College. Kate may be reached at kmarr@clsocal.org.



The Importance of Board Support in High Impact Litigation

By Brenda Marrero, Executive Director¹ and Robin Roberts, Community Board Member,² The Public Interest Law Center (Philadelphia, PA)

I joined the Public Interest Law Center (the Law Center) as executive director (ED) in March 2021. As a longtime public interest lawyer and advocate, I was



Brenda Marrero (L); Robin Roberts (R).

pleased to learn that the Law Center's Board of Directors made the decision many years ago to create community board member seats. Our community board members are past clients, community members of partnering organizations, advocates, and civically engaged individuals connected to the issues we practice in, such as environmental justice, housing, and public education. Additionally, community board members are recruited with diversity in mind — reflecting a goal of many programs which is to have their organizations reflect the communities we serve. That extends all the way up to the ED and to our board of directors.

Nonprofit legal services programs benefit greatly from having clients on their board. In our organization where our focus is high impact litigation and not direct service, it is even more crucial that we have client and community member voices informing our organization's governing body. One of our community board members is Robin Roberts, a longtime advocate for education equity in the Philadelphia School District. In fact, I met Robin during the board interviews when I was in the ED hiring process. She served on the Board ED Search Committee. In forming committees such as hiring the next executive leader, boards should always make sure to include client and community voices.

One of the first cases I learned about when I joined the Law Center was the education funding case. The

Law Center, along with partners at the Education Law Center — PA and the pro bono partner firm of O'Melveny & Myers, sued state actors over the inequitable and unconstitutional school funding system in Pennsylvania. I learned quickly just how significant this case was. At the heart of it is one simple truth — kids who need the most get the least because of their zip code. This is inherently unfair and inequitable. As I watched the litigation play out, culminating in a fourteen-week trial, I recall how much the board engaged with staff on many aspects of the work. The board was always eager to hear updates from the legal team and stayed up to date on the media and communications work we were doing. Board members watched the live stream of the trial when they could and asked questions at board meetings about the legal team and how they were holding up. And it was important to me that community board members stayed engaged. Robin, as I later learned, had a rich history with the Law Center and education equity work. I was so appreciative of the deep passion and engagement she brought to conversations. She clearly understood the struggles involved with lack of sufficient school funding given her advocacy background in education. Robin serves on our board's Communications Committee as chair; and through her leadership, a board member blog was created. Robin was the first blogger and wrote about education equity. I felt lucky that we had someone on the board with that kind of perspective. It only made us better. It also held us accountable.

On February 7, 2023, the court issued their decision in our case and it was a resounding victory for the kids of the Commonwealth of Pennsylvania. The court agreed with our two main claims under the state constitution's Equal Protection Clause and Education Clause. The court rightfully declared the current school funding system unconstitutional and further declared that education is a fundamental right guaranteed by our state constitution — I could only imagine what

an amazing feeling it must have been for community members and advocates like our own board member Robin to hear this. We know that there is a long journey ahead to realize a school funding system that is adequately funded and provides all children with a comprehensive contemporary education. We also know that we are better positioned for success when we have advocates partnered alongside us, which is why our board will continue to include those voices alongside us as well.

**Robin Roberts, Community Board Member —
The Public Interest Law Center (Philadelphia, PA)**

I joined the Law Center Board in 2019 as a community board member because there is a genuine need for an equitable connection between the communities invested in JEDI (Justice, Equity, Diversity, Inclusion) work and organizations who embrace the same mission. As a community board member with deep roots in education equity work, my decades of advocacy work, initially by myself, then joining Parents United for Public Education (Parents United), allowed me to see the power of speaking out and being engaged with strategic solutions to the many challenges of providing education equity within this school district. Joining the Law Center Board has allowed me to share an experienced community perspective around the varied issues of public education from facilities to administration to programming and funding. Community members experience the actual effects of policies and laws created by political judgment and legislation. It is this recognition that motivates people to advocate for what resources are needed in their neighborhoods and schools to make real substantive positive change. The people on the ground know what they need. Organizations like the Law Center have resources to engage decision making stakeholders around the issues in ways that community level advocacy alone cannot reach. The connection and the partnership is necessary to advance real change.

I first became engaged with the Law Center in 2016 when we partnered to sue the Pennsylvania Department of Education to combat the egregious cuts to school funding. This work aligned with the ongoing larger school funding case still making its way through the court. By presenting several thousand parent complaints, we were able to successfully highlight the effects of those draconian cuts and the lack of education that our children were receiving. Since then, Parents United collaborated with PENN Environment and the Philadelphia Federation of Teachers (PFT) to

form Philly Healthy Schools Initiative, whose mission was to get the school district to develop a comprehensive facility plan that would allow our children to have a safe, warm, inviting school building in which to learn.

The education funding case was still in full swing when I joined the Law Center Board in 2019. Part of the school funding litigation strategy was public education around the issues and community engagement and organization. It was critical to make sure the public knew what kind of school funding system we had and why it was important to engage with these issues at the community level. This is the case with so many other organizations who are working to foster safe, connected, high achieving communities. As a community board member for the Law Center, I appreciated knowing what the communications and media strategies were and I knew I could provide a useful voice in ensuring those strategies accurately reflected community needs.

With Parents United, many of the problems with the school district were highlighted by testifying at school board meetings, scheduling meetings with school and district administration, and partnering with other community organizations to bring needed change. We recognized that more help was needed to engage a population we were unable to reach. Watching the school funding trial drove home how the goal of safe school buildings remains unmet. School buildings are failing due to decades of neglect, mismanagement, and funding cuts. And more resources are needed to effectively address the issues surrounding unsafe building conditions. In connection with larger education advocacy, our parent organizations continue to work with the Law Center to hold our school district accountable and ensure that school buildings are safe. We should not have school buildings that have nonfunctional bathrooms, hazardous asbestos and lead exposure, and insufficient temperature control, but we do. We should not have school programming that ignores educating the total student inclusive of specials that are more than just a sprinkling or introduction when other districts are able to provide full coursework, but we do. We should not have our schools become the next battlegrounds instead of safe havens, but we do. Community members have fought for decades to make our schools what we know they can be, the inspiring, innovative, safe places of learning. Public education, like many of the issues the Law Center tackles, has multiple challenges but also, I hope, opportunities for real effective change.

All boards should have open and inclusive spaces

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for community members to have an authentic voice for the work being done by the organization. It cannot be superficial community involvement because organizations are otherwise engaged in performative allyship. We have to recognize that the communities that we say we serve have solutions in mind and their voices should be at the table. We have in depth working knowledge of the main limitations and harms because we are living in it and have had to live with them. Frequently, communities are told to take a back seat. Communities are made to feel that the organization is here to “fix it.” That is impossible because they alone do not know the history, the work already done, or the people already involved. In the end, true success must be a partnership between the community voices, the organization’s mission tools, and the people in the organization doing the work. We as community board members serve a vital role to guide and support the work. I have seen how authentic community voice shapes the work around tenant rights, voting reform, and public education challenges.

The school funding case has been the culmination of many years of hard grassroots work. There have been successes and many setbacks. Of course, I was elated when the decision came out and the court declared the state funding system unconstitutional. It still hasn’t truly sunk in. I am excited to see how this ruling will affect the academics and lives of the children in public education, and I know there is still a long journey ahead of us. The phenomenal work done by Michael Churchill, Claudia De Palma, Dan Urevick-Ackelsberg, and the legal teams from our partner organizations, Education Law Center — PA and the law firm of O’Melveny & Myers, was a testament to years of preparation, deep understanding, and inclusive approaches. As a community board member, I felt that the whole team always valued the perspectives of community members and community engagement. I am glad that the Law Center makes its governing body, the board of directors, a place for community members to have a voice.

1 Brenda Marrero is the Executive Director of The Public Interest Law Center in Philadelphia, PA. Brenda has served in that role since March 2021. Prior to that position, Brenda was Deputy Director of Operations and Chief Diversity Officer at Community Legal Services

of Philadelphia where she also practiced law in aging and disabilities, focusing on long term care access for seniors, nursing home law, and Supplemental Security Income disability. Brenda began her public interest legal career at the AIDS Law Project of PA as a staff attorney. In her current executive director role, Brenda oversees the organization’s mission, strategic vision, fundraising initiatives, board of directors, funder and donor engagement, and internal office operations. Brenda brings extensive experience and a proven track record of successfully managing human resources/operations; running effective teams; budget planning; cultivating a strong leadership brand; and executing cultural change and organizational vision around diversity, equity, inclusion, and belonging. Brenda is the humble recipient of many awards in her professional career, including the Justice Sonia Sotomayor Diversity Award from the Philadelphia Bar Association and the *La Justicia* lifetime achievement award from the Hispanic Bar Association of PA. Brenda was born in Nicaragua and her family immigrated to the U.S. in 1979 under political asylum. Brenda grew up in Los Angeles, CA and moved to the East Coast in 1998 to attend law school. Brenda is a graduate of the James E. Beasley School of Law at Temple University. Brenda earned her undergraduate degree, *cum laude*, from Mount St. Mary’s University in Los Angeles. Brenda is the proud mother of two amazing boys and enjoys watching them grow into kind and justice oriented young men.

2 Dr. Robin Roberts is a long-time advocate for high quality public education in Philadelphia. She has been a member of Parents United for Public Education, a grassroots parent led advocacy group that successfully challenged the draconian cuts to public school budgets in 2014. With the Law Center’s assistance, she was a part of a small group of parents who sued the Pennsylvania Department of Education around the department’s lack of investigation of curriculum complaints. As a result, in 2016, the Pennsylvania Department of Education created its first-ever formal policy and procedure for accepting and responding to complaints from parents, teachers, and advocates about curriculum deficiencies in public schools. As a part of Parents United for Public Education, she worked with the Philly Healthy Schools Coalition to bring attention to the crumbling school infrastructure and advocate for a district wide comprehensive facility plan to ensure safe, comfortable buildings in which Philadelphia’s students can learn free from asbestos, lead paint and water, pest infestations, and heating issues. She continues to work towards high quality public education as a Community Member on the Law Center Board of Directors and as a school district physical therapist.