



MANAGEMENT | INNOVATION | EXCELLENCE | FOR LEGAL AID

2012 Biennial Conference for Legal Services Managers

“Managing for Justice: Developing Skills to Make a Difference”

**October 4 and 5, 2012
Arlington, VA**

Agenda

Wednesday, October 3

6:00 pm	Informal get together at a local spot – meet in the <i>Potomac Grille</i>
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Thursday, October 4

7:30 – 8:30 am	Registration and Continental Breakfast, <i>Potomac Grille</i>		
8:30 – 9:15 am	Welcome Opening Address: “Building a Better Business Case for Legal Aid,” by Jim Sandman, President, Legal Services Corporation <i>Alexandria</i>		
9:15 – 10:30 am	Plenary: “Managing Difficult Conversations,” by Deborah Goldstein, Triad Consulting Group <i>Alexandria</i>		
10:30 – 10:45 am	Break		
10:45 am - 12:15 pm	The Role of the Manager <i>Alexandria I</i>	Building a Race Conscious Practice <i>Alexandria II</i>	Identity Theft: A Cross-Cutting Threat to Client Safety, Income, Employment And Housing <i>Monticello</i>
12:15 – 1:45 pm	Lunch on your own		
1:45 – 3:15 pm	Management Essentials <i>Alexandria I</i>	Cutting Edge Consumer Legal Issues for Advocates <i>Monticello</i>	Enhancing Motivation to Achieve Justice <i>Alexandria II</i>

3:15 - 3:30 pm	Break		
3:30 – 5:00 pm	The Boss from Hell and Related Issues <i>Alexandria I</i>	Time is on My Side: Time Management for Managers <i>Alexandria II</i>	Improving Pro Bono Management and Participation Through Technology <i>Monticello</i>
6:00 pm	Informal networking and planning for dinner– meet in the <i>Potomac Grille</i>		

Friday, October 5, 2012

7:30 -8:30 am	Continental Breakfast, <i>Potomac Grille</i>		
8:30 – 10:00 am	Outcome Measures: More Than a Reporting Headache <i>Alexandria I</i>	Redesigning Your Work to Meet New Challenges <i>Alexandria II</i>	Operating Within the Law - Employment Training for Managers <i>Monticello</i>
10:00 – 10:15 am	Break		
10:15 – 11:45 am	Plenary: “Mindfulness Communication Skills: Powerful Tools for Building Social Justice and the Greater Good,” by Valerie Brown, LeadSmart Coaching <i>Alexandria</i>		
11:45 am – 1:15 pm	Lunch on your own		
1:15 – 2:45 pm	Mapping a Path to Justice: Planning to Ensure Long Term Results <i>Alexandria I</i>	Empathetic Exhaustion: Understanding and Addressing Compassion Fatigue and Vicarious Trauma <i>Alexandria II</i>	Roundtable on Efforts to Develop New Non-LSC Federal Funding Opportunities <i>Monticello</i>
2:45 – 3:00 pm	Break		
3:00 – 4:30 pm	What’s Money Got to Do with It? The Middle Manager’s Role in Finances <i>Alexandria II</i>	The Seven Deadly Sins of Performance Appraisal <i>Alexandria I</i>	Hot Topics in Legal Aid <i>Monticello</i>
4:30 pm	Informal gathering in <i>Potomac Grille</i> while waiting for flights		



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Description of Sessions

Opening Address: “Building a Better Business Case for Legal Aid,” by Jim Sandman, President, Legal Services Corporation

Thursday, October 4, 2012, 8:30 – 9:15 am, Alexandria

Civil legal services programs save government and society money. They are a good investment. Averted foreclosures and evictions, for example, avoid homeless shelter costs, and civil restraining orders in domestic violence cases can avoid future hospitalizations and unemployment. But the data available to quantify the economic benefits of legal aid are often spotty and years old, and many states have no data at all to demonstrate the financial value of legal aid. Jim Sandman will explain why a broad, robust, disciplined, and continuous effort to track the results achieved by legal aid programs and to quantify their value is necessary to educate the public about the benefits of legal aid and to increase funding from all sources.

Special Guest Speaker: Jim Sandman has been President of the Legal Services Corporation since January of 2011. LSC, created by Congress in 1974, is the largest single funder of civil legal aid programs in the United States, supporting 134 programs with more than 900 offices in every state and territory. From 2007 to 2011, Jim was General Counsel of the District of Columbia Public Schools under Chancellor Michelle Rhee. From 1977 to 2007, he was with the international law firm of Arnold & Porter LLP, and he served as the firm’s Managing Partner from 1995 to 2005. Jim is a past President of the District of Columbia Bar. He is currently chair of the DC Bar’s Pro Bono Committee and co-chair of the Standing Committee on Pro Bono Legal Services of the District of Columbia Circuit Judicial Conference. He has served on the boards of the University of Pennsylvania Law School, Wilkes University, the Neighborhood Legal Services Program, and Whitman-Walker Health, among other organizations. He received the University of Pennsylvania Law School’s Howard Lesnick Pro Bono Award in 2011, and in 2008 Legal Times named him one of the “90 Greatest Washington Lawyers of the Last 30 Years.” Jim is a summa cum laude graduate of Boston College, where he was elected to Phi Beta Kappa, and a cum laude graduate of the University of Pennsylvania Law School, where he served as Executive Editor of the Law Review and was elected to the Order of the Coif.

Plenary: “Managing Difficult Conversations,” by Deborah Goldstein, Triad Consulting Group

Thursday, October 4, 2012, 9:15 – 10:30 am, Alexandria

Legal aid managers face difficult conversations every day - managing expectations of hopeful clients, allocating (scarce) resources, operating in constrained budget environment, giving feedback to colleagues. Handling these conversations efficiently is no longer just a good idea – it’s integral to the success of each manager, and ultimately, the entire organization. And failure comes at high cost – conflicts that fester consume energy, sap creativity, and destroy teamwork.

Based on ten years of work at the Harvard Negotiation Project, and the book, *Difficult Conversations: How to Discuss What Matters Most* (Penguin 2000), a *New York Times* Business Bestseller, this interactive Managing Difficult Conversations plenary will provide a framework for understanding why some of our most important conversations are so hard and offer some advice for how to navigate these conversations in a more fruitful way.

Special Guest Speaker: Debbie Goldstein is a Principal and the Managing Director of Triad Consulting, and specializes in the field of conflict resolution. Debbie is a faculty member at the Program on Negotiation at Harvard Law School, an adjunct professor at Georgetown Law School, and a Lecturer at Tufts University School of Medicine.

Debbie’s varied clients include Brigham and Women’s Hospital, Capital One, Merck, Barclay’s, Fidelity, Honda, Standard Bank, Shell, Boeing, General Mills, PricewaterhouseCoopers, Citigroup, Prudential and Proctor & Gamble. She has also addressed students and alumni at Harvard Business School, Duke’s Fuqua School of Business, Harvard Kennedy School of Government, Rutgers University and the Daniels College of Business at the University of Denver. Her work often takes her internationally: to Dubai, where she worked with government leaders; to Ethiopia, where she worked with the Members of Parliament; and to Cyprus, where she taught public policy students from across the globe. She coaches executives through difficult decision making and managing critical relationships, and has helped mediate family business disputes. In the public sector, she founded and ran a free legal aid clinic called LINK (Legal Initiative for Kids) for the patients at Massachusetts General Hospital’s Chelsea outpost. Her writing has appeared in the Boston Globe Magazine, and the Management Information Exchange Journal.

Debbie is a graduate of Williams College and Boston College Law School. After college, Debbie lived in Chicago chasing (and catching) her dream of becoming a jazz vocalist.

The Role of the Manager

Thursday, October 4, 2012, 10:45 – 12:15 pm, Alexandria I

Are you new to middle management, or perhaps not so new but still not clear on what the expectations are for you as a middle manager? Compare notes with your colleagues and pick up some useful tips on how to understand and fulfill your responsibilities. Leave with a tool developed specifically for this session that will provide an overview of the manager’s job in a legal services program. Discover what other sessions are being offered in this conference which will help you address those responsibilities.

Presenters: Craig Harrison, Managing Attorney/Intake, Utah Legal Services; Tanya Douglas, Director Disability Advocacy Project, Manhattan Legal Services; and Patricia Pap, Executive Director, Management Information Exchange

Building a Race Conscious Practice

Thursday, October 4, 2012, 10:45 – 12:15 pm, Alexandria II

This workshop will provide an overview of why it is important for legal aid advocates to be conscious of race in all of their work. The session presenters will cover how to develop race conscious advocacy strategies, how to advance a race equity frame in their cases, why it is important to use data, and how to use data. The presenters will highlight the benefits of shifting focus from a traditional advocacy approach to one which is conscious of race, and provide LSC and non-LSC examples from the ground of this work in practice. The session will also provide attendees with an opportunity to brainstorm about ideas they have, how to get support from the national race equity community, and how to start a conversation about building a race conscious practice in their program.

Presenters: Zenobia Lai, Asian-Pacific American Legal Resource Center; Camille Wood, National Legal Aid & Defender Association; Valerie Zolezzi-Wyndham, Community Legal Aid, Inc., Worcester, MA

Identity Theft: A Cross-Cutting Threat to Client Safety, Income, Employment and Housing

Thursday, October 4, 2012, 10:45 – 12:15 pm, Monticello

Identity theft is a rapidly growing problem that disproportionately affects low-income people. In this session, Lisa Schifferle, an attorney with the Federal Trade Commission and former Supervising Attorney at Maryland's Legal Aid Bureau, will explain the multi-faceted harm identity theft poses to our clients' housing, employment, credit, receipt of public benefits and overall safety and security. Her presentation will cover red flags for identity theft in various practice areas and effective advocacy responses.

Presenter: Lisa Weintraub Schifferle, Attorney, Federal Trade Commission's Division of Privacy and Identity Protection

Management Essentials

Thursday, October 4, 2012, 1:45 – 3:15 pm, Alexandria I

Welcome to the most democratic session of the conference. We'll start out with a vote, choosing three of the following topics: Communicating and Effectively Dealing with Difficult Personalities; Running Productive Meetings; Individual Work Planning; Making the Best Use of your Case Management System; Managing Projects/Setting Goals; Is Work/Life Balance Possible? Once selected we will have a 25 minute module on each topic consisting of 5 minutes of lecture, 15 minutes of small group discussions and exercises around the selected topic and then 5 minutes of wrap up conversation. During the final 10 minutes we'll share some tips and orient you to the materials included on all the topics so you know where to go for more information on the ones that weren't chosen by the group. Join us for a fun, fast moving and engaging session.

Presenters: Craig Harrison, Managing Attorney/Intake Utah Legal Services; Tanya Douglas, Supervising Attorney, Manhattan Legal Services; and Patricia Pap, Executive Director, Management Information Exchange

Cutting Edge Consumer Legal Issues for Advocates

Thursday, October 4, 2012, 1:45 – 3:15 pm, Monticello

This session will focus on cutting edge legal Issues for legal aid programs related to consumer topics such as payday lending, debt settlement, foreclosure rescue, both substantively and with a focus on how managers can develop the capacity to help advocates respond as issues change.

Presenters: James W. (Jay) Speer, Executive Director, Virginia Poverty Law Center; and Andrew G. Pizor, Staff Attorney, National Consumer Law Center, Washington, D.C.

Enhancing Motivation to Achieve Justice

Thursday, October 4, 2012, 1:45 – 3:15 pm, Alexandria II

We all have staff that does what is expected but no more. Some of us have staff that does even less. Some of us have organizational challenges that require staff to accept change. We all have staff that is comfortable doing what they do and vigorously resist change. We all have staff whose “fire in the belly” needs to be reignited. Some of us have staff that want to take on bigger challenges but do not know how to take the leap.

How can we change this picture? What practical steps can we take as managers to support advocates to want to create systemic change? What does our organizational culture need to support and encourage motivated employees willing to take on new challenges? In this session we will: identify factors indicating decreased motivation; review aspects of organizational culture critical to supporting motivated staff; examine and understand successful efforts that have produced effective results in several programs; and take away practical ideas and tools that can support increased motivation and acceptance of change.

Presenters: Jacquelynne J. Bowman, Executive Director, Greater Boston Legal Services; Valerie Zolezzi-Wyndham, Managing Attorney, Community Legal Aid, Worcester, MA; and Katherine W. Shank, Supervising Attorney, Children and Families Practice Group, Legal Assistance Foundation of Metropolitan Chicago

The Boss from Hell and Related Issues

Thursday, October 4, 2012, 3:30 – 5:00 pm, Alexandria I

This workshop will focus on a structured understanding of what makes for bad and good supervision and the interrelationship of good supervision and professional development. After drawing on the attendees personal experiences, we will discuss the steps in developing effective supervision methodologies, mutual goal-setting, check-ins and supervisory styles. We will also discuss a variety of challenging but common issues and approaches to those challenges.

Presenters: Jan Allen May, Executive Director, AARP Legal Counsel for the Elderly; and Michele E. Storms, Assistant Dean for Public Service and Executive Director of the William H. Gates Public Service Law Program at the University of Washington School of Law

Time Is On My Side: Time Management for Managers

Thursday, October 4, 2012, 3:30 – 5:00 pm, Alexandria II

Attendees will begin the session with a self-assessment of their time management skills, then will discuss their own time management challenges. Participants will leave with a practical to-do list of areas to work on. Attendees will learn time management techniques in the following areas: grants management; case management; supervision management; meeting management; and project management. The training will focus on development of four time management skills: 1. planning; 2. organizing; 3. controlling (keeping track of it); and 4. evaluating.

Presenters: Jennifer Berger, Supervisor of the Alternatives to Landlord/Tenant Court for the Elderly Project of AARP Legal Counsel for the Elderly; and Tanya Douglas, Director, Disability Advocacy Project (DAP) at Manhattan Legal Services (MLS) and coordinator of the Veterans Justice Project at MLS which is a program of Legal Services NYC

Improving Pro Bono Management and Participation Through Technology

Thursday, October 4, 2012, 3:30 – 5:00 pm, Monticello

LSC's Pro Bono Task Force (consisting of judges, corporate general counsel, bar leaders, technology experts, leaders of organized pro bono programs, law firm leaders, law school deans and the heads of legal services organizations) recently finished its work and made recommendations on improving pro bono engagement and management. This session will introduce you to those recommendations made for placing more cases and improving the management of your pro bono efforts using the latest in technology tools, such as mobile websites, improvements to case management systems, Live Chat, VoIP telephony, and social media. The idea is to use these tools to work smarter, not harder.

Presenters: Glenn Rawdon, Program Counsel for Technology, Legal Services Corporation; Ed Higgin, Senior Manager, Montana Legal Services Association

Outcome Measures: More than a Reporting Headache

Friday, October 5, 2012, 8:30 – 10:00 am, Alexandria I

With increased frequency, managers are asked to report or assess their work according to "outcome measures." These requirements are frequently regarded as reporting headaches. However, the process of developing clear outcome expectations is a hallmark and critical tool of strategic advocacy. Good outcome measures help keep work on track and focused on clearly defined objectives. They allow us to determine whether our work is making the difference we seek for clients.

This session will provide an overview of meaningful outcome measurement and apply the concept of outcome measures to legal services work. We will demonstrate how managers can work with staff to develop meaningful outcome measures and participants will have an opportunity to apply some of the techniques discussed.

Presenters: Annette Farnan, Deputy Director, Legal Aid of Nebraska; Hannah Lieberman, Executive Director, Neighborhood Legal Services Program of Washington, D.C.; and Sara Debus-Sherrill, Senior Associate in ICF International's Justice and Substance Abuse division of the Health, Education, and Social Programs center

Redesigning Your Work to Meet New Challenges

Friday, October 5, 2012, 8:30 – 10:00 am, Alexandria II

Legal aid organizations nationwide are faced with the dramatic confluence of escalating and changing client need at the same time that resources are diminishing or increasingly restricted. In such circumstances, it is not possible – or acceptable – to stick with business as usual. This session will examine how several programs have changed their work focus and structure to adjust to difficult times and changing substantive challenges. It will provide models that may help you rethink your own work and offer you an opportunity to discuss your circumstances and options with your colleagues.

Presenters: John A. Tull, John A. Tull & Associates; Diana White, Executive Director, Legal Assistance Foundation of Metropolitan Chicago; Alison Paul, Executive Director, Montana Legal Services Association; and Valerie Zolezzi-Wyndham, Managing Attorney, Community Legal Aid, Worcester, MA

Operating Within the Law – Employment Training for Managers

Friday, October 5, 2012, 8:30 – 10:00 am, Monticello

This well-respected labor and employment law attorney from Seyfarth Shaw LLP will provide practical information to legal aid managers on the employment law cycle of staffing; investigations and leaves of absence accommodations; adverse actions; and wage-hour requirements. She also will discuss the manager's responsibilities and liabilities, both organizational and personal. If you are a new manager, this session is essential.

Presenter: Karla Grossenbacher, Esq., Partner, Seyfarth Shaw LLP

Plenary: "Mindfulness Communication Skills: Powerful Tools for Building Social Justice and the Greater Good," by Valerie Brown, LeadSmart Coaching

Friday, October 5, 2012, 10:15 – 11:45 am, Alexandria

This highly interactive 90-minute plenary session provides practical application of mindfulness for legal services lawyers and managers. The focus of the session is on one of the core elements of mindfulness: positive communication skills to promote greater understanding and enhance well-being. The practice of law while rewarding on many levels can be especially demanding for legal services attorneys and managers who face ongoing reductions in state and federal funding and crushing caseloads, among other issues. Many of these lawyers report burn out and stress-related physical and emotional conditions. These conditions strain a lawyer's work performance and home-life balance. While the Rules of Professional Conduct demand greater civility, lawyers are increasingly burdened by crushingly high expectations, anxiety about keeping up with the workload and home responsibilities, and the complexity of representing low-income clients.

Special Guest Speaker: Valerie Brown is a certified leadership coach, leadership educator, and Principal of Lead Smart Coaching, LLC in New Hope, PA, specializing in leadership coaching of school leaders. Her work and writing point toward powerful transformation through mindful awareness, and her passion is for creating greater trust, authenticity and integrity among people. Her expertise spans over two decades as a successful attorney-lobbyist representing legal and educational institutions, including Legal Services of New Jersey and the New Jersey State Bar, giving her a keen client-centered, results-oriented perspective.

Trained at Center for Transformational Leadership at Georgetown University, the Center for Courage & Renewal, the Center for Mindfulness in Health Care, Medicine and Society, and Chestnut Hill College (PA) Program in Holistic Spirituality, Valerie understands the importance

of emotional IQ in shaping leaders and creating trustworthy relationships. She holds several degrees, including a BA, MA and JD. An accomplished author, her new book on transformation is entitled, The Road that Teaches: Lessons in Transformation through Travel (Quaker Books 2012). She teaches mindfulness at retreat centers throughout the U.S and Canada.

Mapping a Path to Justice: Planning to Ensure Long Term Results

Friday, October 5, 2012, 1:15 – 2:45 pm, Alexandria I

If you don't know where you are going, should it matter where you end up? As managers and supervisors, we often get caught up in the day to day activities responding to crisis after crisis and facilitating the work of others in our unit or office. When do we have time to think about the goals and objectives of the work we are doing? Where does what we do every day fit in the big picture? We are just managers, why should we care and even if we did care how would we go about achieving this? In this session we will discuss the benefits of middle managers actively planning for their unit's or office's future and anticipating changes. Participants will have hands on opportunities to begin to plan for the long term using practical tools to guide their efforts.

Presenters: Andrea Zigman, Deputy Director, Legal Services-New York City; Jacquelynne J. Bowman, Executive Director, Greater Boston Legal Services

Empathic Exhaustion: Understanding and Addressing Compassion Fatigue and Vicarious Trauma

Friday, October 5, 2012, 1:15 – 2:45 pm, Alexandria II

Disaster workers and health professionals are known to suffer from compassion fatigue and secondary trauma. Legal services professionals may be particularly vulnerable since their training may not include dealing with their own emotional reaction to traumatized clients. Instead, these professionals are often mislabeled as suffering from burnout when they exhibit psychological distress that affects their work. This session will discuss how to develop a better understanding of the issues surrounding compassion fatigue and vicarious trauma and tips and strategies that managers can use in the workplace to address it.

Presenters: Karen P. Simmons, Executive Director, The Children's Law Center; and Roger Sherman, LMSW

Roundtable on Efforts to Develop New Non-LSC Federal Funding Opportunities

Friday, October 5, 2012, 1:15 – 2:45 pm, Monticello

Join Karen Lash, Senior Counsel for Access to Justice at the U.S. Department of Justice, and Don Saunders, Vice President of Civil Legal Services at the National Legal Aid and Defender Association, for a roundtable discussion about efforts to develop new partnerships between legal aid programs and federal agencies with anti-poverty programs. Karen will discuss DOJ ATJ Initiative and Legal Services Corporation efforts to identify safety-net federal grant programs and non-grant federal activities that could be strengthened by incorporating (and expressly allowing for) legal services. Don will talk about NLADA plans for training and technical assistance to support programs pursuing non-LSC federal funds. Participants will be asked for input on the kind of training, technical assistance and other tools that would help you access these funds for your program and more generally about the ways federal agencies can better engage legal aid programs in their anti-poverty activities.

Presenters: Karen Lash, Senior Counsel for Access to Justice, U.S. Department of Justice; and Don Saunders, Vice President of Civil Legal Services, National Legal Aid and Defender Association

What's Money Got to Do with It? The Middle Manager's Role in Finances

Friday, October 5, 2012, 3:00 – 4:30 pm, Alexandria II

This workshop will explore the various roles that managers can play in the fiscal health of the organization they work for. Among the issues to be addressed are: the role of the manager in maintaining existing funding sources and collaborating with other staff in generating new proposals and new sources of revenue; thinking through various management decisions and the impact that they have on the bottom line; exploration of the possibility of delegating certain fiscal tasks to managers as opposed to centralizing with the Director and/or business manager; exploring other ways that managers might play a more active role in the financial "ownership" of the program in terms of financial problem-solving, revenue enhancement, budgeting and expenditures.

Presenters: Robin Bozian, Managing Attorney, Southeast Ohio Legal Services Association; Anita Bailey, Chief Attorney, Legal Aid Bureau, Inc.; Patricia Pap, Executive Director, Management Information Exchange

The Seven Deadly Sins of Performance Appraisal

Friday, October 5, 2012, 3:00 – 4:30 pm, Alexandria I

This workshop will focus on the "Seven Deadly Sins of Performance Appraisal" and how you can avoid them. We will then discuss a variety of common but difficult issues and challenges dealing with performance such as dealing with mediocre Myron, the square peg in a round hole, perception of unequal workload, generational issues and passive aggressive behavior in the workplace.

Presenter: Ann Zaragoza, Managing Attorney, San Antonio Office, Texas RioGrande Legal Aid

Hot Topics in Legal Aid

Friday, October 5, 2012, 3:00 – 4:30 pm, Monticello

This discussion will cover a wide variety of topics at the national level related to the delivery of civil legal aid. Among the areas to be covered are: 1) FY 2013 LSC appropriations status; 2) Non-LSC federal funding opportunities; 3) Census redistribution for LSC grantees; 4) Potential impact of federal sequestration on LSC budgets and other federal programs; 5) IOLTA and state funding; 6) Outcome and performance measures/the emerging research agenda; 7) Pro bono initiatives; 8) Other topics of interest to workshop attendees.

Presenter: Don Saunders, Vice President, Civil Legal Services, National Legal Aid and Defender Association