



Management, Innovation, Excellence — What MIE Brings to Legal Aid Training

*By Patricia Pap, Executive Director
Management Information Exchange*

Management Information Exchange (MIE) seeks to spark excellence in leadership, management and fundraising in legal aid programs serving low income clients, through training, consulting and publishing activities. MIE has built an outstanding reputation for our timely and practical training opportunities. MIE offers regularly scheduled trainings for executive directors, senior and mid-level program managers, supervisors of legal work, fundraisers, administrators – and now, board members. In addition MIE offers custom training development and delivery to legal aid programs.

This description identifies some of the trainings that MIE has developed and offered in recent years to legal aid programs. These trainings may be modified and conducted for individual programs or groups of programs at the local, state, regional or national level.

Supervising Legal Work

The legal aid supervisor's role is multidimensional. Supervising Legal Work training offers opportunities for supervision skill-building through large group instruction and demonstration, and small group exercise and discussion. Core supervision concepts include: the role of the legal aid supervisor; performance feedback; supervision systems; diversity and supervision; workplans; supervision and leadership; designing and managing projects; and

supervision in the real office. The knowledge offered by the experienced supervisors-trainers is enhanced by the sharing of ideas with colleagues who grapple with similar supervision challenges in their daily work.

MIE has held Supervising Legal Work trainings throughout the country for fifteen years, training over 1400 supervisors. These trainings have truly changed the culture around supervision in legal aid. This is what participants say about their experiences at MIE Supervising Legal Work trainings:

Overall this was one of the best trainings of any sort I have attended.

Legal services needs to take management and supervision more seriously and this is a great start.

Small group exercises were used to apply the lectures/demonstrations on particular topics. This was a really helpful response to the plight of "middle management."

I liked the lectures and the opportunity to practice. Very practical ideas, skills I urgently need.

The work plan development and discussion was tops. It was incredible to think about this stuff.

The roundtable/peer input part of this training was very helpful. Integrating real tasks (design a work plan, plot a project) into training was very effective. Not only did it give us an opportunity to put new skills into practice - but it also worked to show how effective those skills can be.

This is the sort of training that will cause me to reflect on the choices I make, the priorities I set, and the way my office runs for many months.

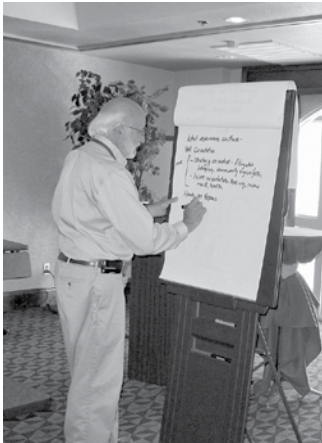
Feedback from peers and instructors with experiences similar to what I face day-to-day on my job was the best.



The materials were great.

I would recommend that all our managers go back for a refresher if they haven't been for a while.

Great program, obviously the result of much planning and effort. Thanks to all planners.



John Arango at New ED Training.

New Executive Director Training

New Executive Director Training helps new directors, who typically learn on-the-job, to more quickly achieve deeper insight into their work. The training stresses both 1) knowing what should be done to lead an effective program, and 2) actually doing what needs to be done. Knowing is accomplished through an extensive set of materials, with a CD to guide self-study. Most of the training itself is devoted to doing/performing some of the most important tasks required of executive directors. Participants also work on actual situations brought to the training by their colleagues.

Topics covered include:

- What is an effective legal assistance program?
- What is leadership, and how does it differ from management and administration?
- What strategies can be used to deliver services?
- How do you determine impact? Leading change: why do transformation efforts fail?
- What makes a program a "good place to work"?
- How can you work effectively with a board of directors?

This training is led by MIE consultant John Arango and an Executive Director volunteer from MIE's Board or Training Committee.

MIE began New Executive Director Training in the late 1980s. During the course of twenty+ years, more than 300 new executive directors have engaged in dis-

cussion around the topics noted above and have developed peer support networks which last throughout their tenure. This is what participants say about their experience at MIE's New Executive Director Training:

I benefited from all aspects of the sessions, and learned a good deal about my obligations as an ED – that of developing a vision, staff and organizational issues.

The "role of the executive director" session was incredibly informative and the exchange provided me an outline for implementing board of director and staff initiatives.

I truly appreciate the opportunity to meet everyone and discuss our issues. The roundtable was great.

I liked that the agenda was flexible to allow for free-flowing discussion.

Good handouts and training manual. Valuable materials to continue to refer to over time.

The leaders were terrific, well-prepared and extremely knowledgeable.

The networking with the other directors was fabulous.

The different perspectives of different EDs was great.

I will be looking forward to attending more training sessions and to take advantage of the tools provided by MIE.

The most valuable training I have received so far.



National Fundraising Conference

This annual conference is for board members, volunteer fundraisers, executive directors, development directors, grant writers, office or unit managers — and any other staff member who wants to help legal aid funding grow.



- Sessions typically include:
- Welcome Roundtable for Fundraisers New to Legal Aid
- Foundation Fundraising
- Successful Capital and Endowment Campaigns
- Developing a Successful Cy Pres Strategy

- The Effective Fundraising Board
- Pro Bono and Legal Aid
- The Fundraising Nexus; Developing an Effective Communications Strategy
- Multi-generational Communications
- Fundraising in Smaller Communities
- Governmental Fundraising
- Building Relationships with Major Donors
- The Successful Development Plan
- Organizing or Revitalizing a Private Bar Campaign
- Strategies for Raising Funds from Corporations
- New Entrepreneurial Activities which Fund Program Services
- Positive Ways of Telling Our Story
- Ethical Fundraising, and
- Thirty Minutes with an Expert mentoring session

MIE has sponsored the Fundraising Conference since 1999. During the course of eleven years, the cumulative registration at this annual conference is more than 1400. Many fundraisers, of course, come back year after year, to learn the latest, share successes and network with their resource development colleagues. This is what participants say about their experience at MIE's National Fundraising Conference:

The MIE Fundraising Conference is always a worthwhile investment of time and money. It gives us development folks, who often have to function as islands unto ourselves, a huge boost.

What I like best is networking with people across the country... learning from the Best of the Best...

I am new to MIE, new to fundraising, and new to Legal Aid and this was the perfect event to get my feet wet. I have indeed arrived home with a ton of great ideas.

This year, overall the presenters were great, but the opening plenary on Generational Marketing was over the top fantastic, interesting, amusing, and new.

Wonderful materials! I'm glad I can get handouts for the sessions I didn't attend.

Thirty Minutes with an Expert mentoring session was reinforcing, stimulating and a very worthwhile addition to the conference.

We had a fantastic time and learned a whole lot. I have enormous respect for the MIE, which is populated with interesting, creative, extraordinary people. GREAT JOB, thank you.



National Conference for Legal Services Administrators

This conference is for all of those staff members who carry out a broad range of administrative functions: fiscal; grant writing; compliance with funder requirements; benefits administration and human resources; training; technology; and office management, including facilities and contract negotiation with vendors.

Sessions typically include:

- Facilities Management
- Technology—Hardware, Software and Connectivity
- Vendors/Purchasing; Fiscal Issues
- Mergers and Acquisitions
- Budgeting for Multiple Funding Sources, Multiple Offices
- Managing Multiple Funding Sources
- Accounting Software
- Financial Policies and Procedures Manuals
- Creating Necessary Financial Reports
- Accumulating and Investing Reserves
- Effective Supervision
- Difficult Conversations
- Employment Law
- Insurance; Retirement Programs, and
- Using The New Social Media

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Continued from page 41

MIE created the National Conference for Legal Services Administrators in 2001. It has been held every eighteen months since then – seven conferences in all. Cumulatively, 400 administrators have benefited professionally from this conference. Many return, to learn the latest, share successes and network with their colleagues. This is what participants say about their experience at MIE's National Conference for Legal Services Administrators:

This is the best program for legal services administrators. It truly addresses our concerns in ways that others do not.

The best thing about the MIE administrators conference is the opportunity to interact with administrators and fiscal folks from other programs. Very helpful!

Sessions covered topics that are very relevant to administrators and financial people. The ability to share ideas/best practices was very helpful.

It was really helpful to learn how other programs are managing their time keeping and grant allocations.

This is my third MIE administrators conference and I always learn something new from both the sessions and the networking.

I really liked the content of all fiscal sessions I attended. It certainly will help me with my accounting duties.

The technology piece really helped. I didn't realize how behind we are in technology compared to some legal services programs.

MIE does an excellent job putting together information and allowing networking for administrators. You are appreciated for all that you do.

Great conference. I left with tons of ideas to implement in my organization.

Thank you to all who participated in planning and executing a great conference. I look forward to the next one.



Directors Conference Presenters from left to right, top row: Mary Asbury, Betty Balli Torres, Robert Sable; Middle row: Cathy Carr, Lillian Moy, Colleen Cotter; Bottom row: Diana White, César Torres, Toby Rothschild.

National Directors Conference

Held every two years, the National Directors Conference offers experienced and new legal aid executive directors, deputy directors and senior managers the opportunity for an extended conversation on an important topic of the moment in an intimate setting. Recent conferences have included topics such as: Moving from "Good to Great;" Managing Money as an Element of Greatness; What is the "Executive" in Executive Director?; Mergers and Reconfigurations; Emotional Intelligence, Leadership and the Workplace; Building Better Programs; Employment Law; and LSC and other funder compliance issues.

A National Directors Conference was among MIE's earliest activities as an organization, dating back to the mid-1980s, and support to directors remains central to MIE's mission. More than 250 directors have participated in these biennial conferences. This is what participants say about their experience at MIE's National Directors Conference:

I benefited from the opportunity to share experiences with other EDs with a wide range of experiences. This includes both very experienced and relatively newer EDs; I was pleased that all brought something to the table.

I enjoyed the thoughtful conversations. Folks seemed to be at a high level, willing to question how they are doing things. It was refreshing.

There were an array of excellent presenters who kept the conversations focused and on point.

Very smart, well prepared, and experienced presenters. Very well organized.

I welcomed the opportunity to chat with peers and hear ideas and input from leaders in the community.

The agenda was well put together and it seemed to have something for everyone.

Materials were helpful and insightful. I will use them back home and I plan to share with them with my team.

Terrifically organized, very good conference. Thanks for all you do.



Albuquerque International Balloon Festival, immediately after the MIE Conf: Up, Up and Away! Real Skills for Managing Now! Oct. 2009 Albuquerque NM

Biennial Conference for Legal Services Managers: Leading from the Middle

This conference is for all legal aid program staff who oversee branch offices, or programs or systems that involve management responsibility and supervision of staff or volunteers.

Sessions at this conference typically include:

- Coaching and Mentoring
- Difficult Conversations

- Improving Employee Performance
- The Challenge of Performance Appraisals
- Managing Conflict
- LSC and Non-LSC Programs Working Collaboratively
- Financial Management
- Using Your Case Management System for High Quality Supervision
- Fundraising and Marketing
- Effective Advocacy under LSC Restrictions
- Strategic Planning
- Identifying and Meeting Clients' Legal Needs
- Effective Use of Technology
- Designing and Managing Projects
- Measuring and Evaluating Outcomes
- Managing with Unions
- Planning Across Substantive Issues to Meet Client Needs
- Teamwork
- Tough Decisions: When Staff Need to Leave
- Hiring, Training and Orientation
- Time Management
- Maintaining a Safe Workplace
- Cultural Competence
- Managing Change, and
- Work/Life Balance

MIE created "Managers in the Middle" in 1998. The conference has been held every eighteen months since then – eight conferences so far. This is perhaps the only place where legal aid managers receive management training specifically related to work in a legal aid program. Cumulatively, more than 600 legal aid managers have benefited from this conference. Many return, to learn the latest, share successes and network with their colleagues. This is what participants say about their experience at MIE's Biennial Conference for Legal Services Managers: Leading from the Middle:

The program was great! I learned so much and it was helpful to hear what other managing attorneys were facing in their programs.

The program gives you time to sit and think about your work, to interact with others in the same situation.

What a wide variety of topics — something for everyone. Session I got the most out of was the "How to Have a Difficult Conversation." Great speaker and very interactive.

I liked the useful information regarding work plans, project planning, evaluations, and time management.

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Continued from page 43

The technology sessions were extremely informative and provided me with very important information. I also benefitted from the opportunity to network with colleagues from other parts of the country.

First of all, I appreciated the diversity of speakers. I liked the willingness of the speakers to take questions, engage the audience in thoughtful ideas about the subject.

The conference materials have a lot of good information. I'm glad that it includes the materials for the workshops I wasn't able to attend.

Great job with the conference. It was my first MIE conference, and I'm sure it will prove valuable to my work.

This was a very good conference, I'm glad I went. It was very helpful to find out that other programs are implementing projects that we have been talking about for a long time.

I was glad to see that the life balance/life quality workshops were included in this conference, as that has always been a priority for me, including for my staff.

Thank you for providing such an informative and relevant conference.

MIE consistently puts on high quality conferences. I can't wait to send my Deputy Director to the next one.

Leadership Legal Aid

MIE designs and delivers custom leadership training for advocates and all staff members of legal aid programs. This training is rooted in MIE's *Principles of Leadership in the Legal Aid Community*. The training may be delivered within a program, or among multiple programs within a state or region. It offers the opportunity for collaborative advocacy work among staff and programs.

By participating in MIE's Leadership Legal Aid, advocates and staff will:

- Increase cross cultural effectiveness
- Build a support network with other legal aid leaders
- Enhance one's ability to participate in community wide advocacy processes.

Sessions typically included in MIE's Leadership Training include:

- Leadership – What It Means to Me
- Traits of Effective Leaders
- Analyzing and Meeting Clients' Advocacy Needs
- Designing and Managing Projects
- Nuts and Bolts of Leading and Managing the Legal Aid Program
- Conversation with National Leaders and other Leaders from Legal Aid Programs
- Effective Communication Techniques; Teamwork
- Managing Change; Cultural Competence

MIE has designed and conducted Leadership Training programs for the Legal Services Corporation of Virginia; Legal Services of New York City; Ohio Legal Assistance Foundation; the National Disability Rights Network, and others. MIE includes components of Leadership Training throughout its trainings and conferences.



Legal Services NYC: Managing for Excellence Leadership Institute.
