



The College of Law Practice Management

The College Gives Back

Experts from the College of Law Practice Management Deliver Pro Bono Consulting to LSC Legal Aid Organizations

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Ed Flitton ate his own dog food. For those who have never heard this expression, it might sound a bit irreverent.

The point is, he not only talked the talk but also walked the walk. He did not ask anyone else to do a difficult task he was unwilling to do himself.

When Ed took over as president of the College in 2008, he called each of the Trustees to ask our opinions of the health of the organization. I told him that we needed to do more than meet once a year in our fancy clothes and pat each other on the back. We have so much talent and skill and experience that could be used to improve the profession and the country. Several of the Trustees thought the College needed some action agenda to “make a difference.” When he asked for ideas to match up the talent in the College with the needs of the profession, I told him about the early discussions with the Legal Services Corporation to do pro bono consulting with the organizations that provide legal aid services to the poor.

LSC is the single largest provider of civil legal aid for the poor in the nation. Established in 1974, LSC operates as an independent 501(c)(3) nonprofit corporation that promotes equal access to justice and provides grants for high-quality civil legal assistance to low-income Americans. LSC distributes more than 95 percent of its total funding to 136 independent nonprofit legal aid programs with more than 900 offices that provide legal assistance to low-income individuals and families throughout the nation.

LSC promotes equal access to justice by awarding grants to legal services providers through a competitive grants process; conducting compliance reviews and program visits to oversee program quality and compliance with statutory and regulatory requirements as well as restrictions that accompany LSC funding; and by providing training and technical assistance to

programs. LSC encourages programs to leverage limited resources by partnering and collaborating with other funders of civil legal aid, including state and local governments, IOLTA, access to justice commissions, the private bar, philanthropic foundations, and the business community.

Helaine Barnett, then the president of the Legal Services Corporation (LSC), was interested in a proposal we had advanced, with the blessing of the Board of Trustees, to match the experts in the College with the management, technology and marketing needs of legal aid societies. Ed invited Helaine to attend our next Board meeting. Soon after, with Board approval, Ed signed a Memorandum of Understanding with the Legal Services Corporation under which College Fellows would join a series of program performance visits designed to observe and improve the operations of legal aid organizations funded by LSC. A small group, including Mary Beth Pratt and the late Jim Lantonio, was appointed to oversee the College's work and recruit volunteers.

These visits are a standard part of the quality assurance effort of LSC. They are organized to spend a full week on site at the local legal aid society plus whatever preplanning and report writing falls outside of that time. In our agreement with LSC, we insisted that our Fellows' time contributions be shorter than a full week. We requested a targeted assignment of two days. LSC agreed and changed its process to accommodate the College. In advance of each request for Fellow participation in a program visit, the LSC leader of the visit identifies a specific need that one of our experts could address. In advance of the visit we know that LSC and the legal aid program sought help in addressing challenges in marketing, HR or management structure, for example. The College then finds a Fellow experienced in that discipline to help address the specified need during two days of the week-long visit.

Here's the dog food part. When the first four visits were organized, Ed insisted that he would do one of the visits. But more, Ed decided that he needed to participate in the entire visit, including all the preplanning and the report writing that follows so that he fully understood the process. His participation in the visit to a major west coast city was a great success. He worked with the LSC team for the entire week. He made friends and would reconnect with them for drinks and conversation when they were in the same town for a convention or a conference. They valued his insights and he savored the experience.

Ed also became a solid supporter of this LSC partnership. In the last week before she resigned as the longest serving LSC president, Helaine Barnett signed a second MOU with the College. Just a few weeks before he died, Ed Flitton also inked the agreement.

To help all the fellows understand what Ed learned and to capture the value of this LSC/College partnership to both partners, here are reports from several of the fellows who participated in program visits: Cherie Olland, John Kirk, Joel Rose and Dick Potter.

Under the current MOU the College will participate in two or three more program performance visits in 2010. We are also planning to meet with LSC leadership and staff in Washington when

we all gather for the College's Annual Meeting in October. This meeting is characterized as a "training session" in the MOU signed by Ed and Helaine Barnett. But I think it will be more of a brainstorming session to explore new and more effective ways to bring the expertise, talent and energy of the amazing fellows of the College to bear on the difficult and often overwhelming problems of delivering assistance to those low income people who desperately need legal services.

Here are some excerpts written by College of Law Practice Management Fellows describing their personal reactions to their LSC program visits in 2009 and 2010. In their own words:

Cherie Olland:

Working with the Legal Services Corporation on their first joint venture with the College of Law Practice Management to conduct a site visit to the Legal Aid Society was a highlight in an otherwise quite bleak 2009. Although there are ample opportunities for our lawyers to contribute to the greater good of the profession, there are far fewer opportunities for those of us on the management side to make such contributions. So I saw this assignment, which preceded my induction as a Fellow by several months, to be a tremendous opportunity to give something back. My role, alongside representatives of the LSC, was to concentrate on the areas in which there was an intersection between my areas of expertise – marketing, development and communications – and the LAS's needs. We worked together to surface strengths and weaknesses and to help identify cost-effective solutions to persistent issues.

The LAS's self-awareness was impressive. They were very cognizant of what they do well and where they are weak. I was impressed and, I must admit, surprised, not only by the level of expertise that was within their command, but by their level of commitment to LAS's mission, its vision and its potential to impact on the community. Although LAS has not yet called upon Jones Day's marketing resources, we would love to help them out from time to time, and do keep in touch. All in all, this short consultation was a stimulating "feel-good" experience that I would highly recommend to other Fellows.

As an aside, because this early visit was very early in our collaboration with LSC, I think they were quite skeptical of what we could add and were perhaps a little suspicious about what we were really up to. As the week progressed, I thought the tension reduced significantly. It sounds like the program has really taken hold since then, which pleases me.

John S. Kirk:

During my visit, my duties were to review the financial and HR functions of this large, metropolitan legal aid group.

The assignment was challenging, not having had the benefit of previously working with the Legal Services Corporation review team based in Washington, D.C. However, the background material given to me was very comprehensive and easy to follow. It was an interesting challenge to wear the hat of a “law firm consultant,” instead of my usual role as law firm administrator.

I found that the staff members were very willing to share information, and they seemed quite receptive to our suggestions and recommendations. Some of what was offered was a hard-sell, due to budgeting and staffing constraints, but they were nonetheless receptive and upbeat. I had the opportunity to return to the legal aid office a few weeks after the audit, to assist them with some staffing questions and challenges. Budgetary issues aside, they are running a law firm of sorts, so College members are well-placed to offer similar organizations suggestions and advice on meeting their operational challenges.

Joel Rose:

I represented the College in performing a management study with the Legal Services Corporation to assess and recommend on issues that affected the development and implementation of a Succession Plan for the executive director of the local society.

My responsibility was to assess the present process for planning the orderly succession of a new executive director, and recommend improvements to the present succession process.

To perform this study, I participated in several telephone interviews with the team leader of the LSC who oversees planning and operations, and the members of her team; read various manuals describing the table of organization, the Strategic Plan and the Leadership Strategic Plan; and reviewed a list of the expectations prepared by the Board of Directors to assess the performance of the executive director.

I spent two days on site conducting personal interviews with the president of the Board of Directors, the executive director and selected executives, and a telephone interview with Ron Staudt, as a member of the COLPM Board.

Following this visit, I returned to my office and drafted a detailed management report that contained my recommendations about methods for improving the succession process for the group’s executive director.

I received letters of appreciation from the director of LSC and the LSC regional team leader responsible for overseeing the planning and operations of the local group. I also received very nice comments about my work from a member of the COLPM Board.

I was delighted to participate in this management study. The LSC and the executives with whom I interacted appreciated that College Fellows were willing to donate their time to offer recommendations to improve their management practices.

On a personal level, I was very pleased to be of assistance to LSC and the local group, and thoroughly enjoyed working with the executives of both organizations.

I recommend that COLPM continue to offer its management expertise to deserving not-for-profit organizations and would be pleased to assist on other projects in the future.

Dick Potter:

My site visit was to the legal aid society in a large and sprawling ex-urban area, much like the rural Ontario countryside from which I work. My role was to review the local society's outreach, internal and external: in conventional terms, its marketing, communications and fund-raising functions. The preparation was very good, with LSC using an external, web-based platform for the relevant documents. I enjoyed the interaction with both the LSC people based in Washington and the local society senior personnel. Having just completed the visit in April, I can't yet comment on our ability to have a role in follow-up, but I would very much recommend participation by College Fellows in this collaboration. I enjoyed the people and felt my skills were being put to good use.