

Effective Delivery '97: Managing Legal Work

September 17 & 18, 1997

Sponsors:

**National Legal Aid & Defender Association
Management Information Exchange**

Innovations & Ethical

**Considerations in Hotlines, Technology, and
Pro Se Delivery**

September 18 - 20, 1997

Sponsors:

American Association of Retired Persons

Legal Services Corporation

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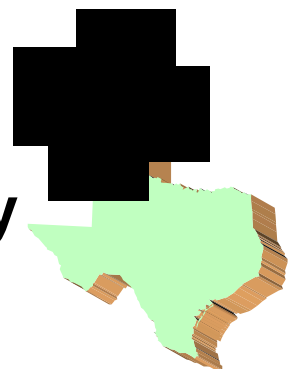
Management Information Exchange

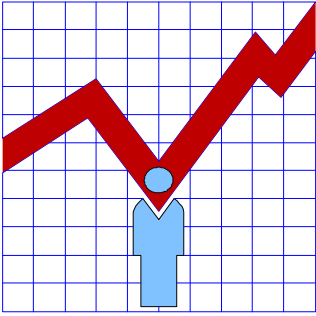
State Bar of California

**ABA Standing Committee for the Delivery of
Legal Services**

Register for both and save!

**Hyatt Regency
Dallas, Texas**





Positive results are what we strive for when representing clients. But it's up to you to possess a firm grasp of the information and skills necessary to achieve positive results. We are pleased to announce two special conferences that will provide a wide range of information and skills training designed to improve the delivery of civil legal services in a constantly evolving environment.

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Effective Delivery '97: Managing Legal Work - September 17-18, 1997

Presented by the National Legal Aid & Defender Association and Management Information Exchange, this training will prepare program leaders to develop expectations for what we can achieve for our clients; to configure offices to address issues that cut across specialty areas; to cope with significantly higher demand for services; to coordinate legal work in a multi-provider setting; and to manage complex projects.

Who Should Come?

- LSC and non-LSC Executive Directors, Directors of Litigation, Managing Attorneys and others responsible for leading their programs through major substantive change
- IOLTA funders and program staff
- Pro bono providers

Preliminary Agenda:

Tuesday, September 16

- 5 PM - 7 PM Early Registration
- 7 PM - 9:30 PM Washington Update and Opening Reception. Hear about the latest DC doings from NLADA's Don Saunders and the Center for Law and Social Policy's (CLASP) Alan Houseman. This will be an opportunity to meet other participants and to dispose of immediate concerns before the conference begins.

Wednesday, September 17

- 7:30 AM - 8:30 AM Registration/Coffee
- 8:30 AM - 8:40 AM Welcome; *Clint Lyons, Executive Director, NLADA*
- 8:40 AM - 9:25 AM Opening Keynote: *Rev. Fred Kammer, SJ, President, Catholic Charities USA*
- 9:25 AM - 11 AM Perspective on Changes in Programs and Policies of Major Importance to our Clients; Implications of These Changes for Legal Services: *Alan Houseman (Moderator) & Paula Roberts, CLASP; Barbara Sard, Greater Boston Legal Services; James Head, National Economic Development and Law Center and NLADA President; John Vail, Center for Law and Education; Gordon Bonnyman, Tennessee Justice Center (invited)*
- 11:15 AM - 11:30 AM One Perspective on Change: *Jon Asher, Legal Aid Society of Metropolitan Denver* will discuss the ways he and his program have dealt with substantive change.
- 11:15 AM - 12:15 PM Discussion Groups - An opportunity for participants to discuss the issues addressed earlier by the panel
- 1:45 PM - 3:30 PM Rethinking Fundamental Issues - *Don Saunders, Moderator; Victor Geminiani, Legal Aid Society of Hawaii; Tanya Nieman, Volunteer Legal Services Program - Bar Association of San Francisco; Mike Milleman, University of Maryland School of Law; LeAnna Hart Gipson, Monroe County Legal Assistance; John McKay, President, Legal Services Corporation (Invited).*

Wednesday, September 17 (Cont'd.)

- 3:45 PM - 4:15 PM Two Reactions to Rethinking Fundamental Issues
4:15 PM - 5:30 PM Discussion Groups: An opportunity for participants to discuss the issues addressed earlier by the panel

Thursday, September 18

- 7:30 AM - 8:30 AM Registration and Coffee
8:30 AM - 9:30 AM Panel Discussion - Coping with Change: *Mary Asbury, Legal Aid Society of Cincinnati; Bob Gillette, Legal Services of Southeastern Michigan*. Practical advice on helping program staff cope with major change in substantive programs and policies.
9:30 AM - 9:45 AM Overview of Managing Change: John Arango, *Algodones Associates*
9:45 AM - 11 AM Concurrent Sessions
√ Mergers and Restructuring: *Bob Gillette; Steve Frazzini, Legal Aid Society of Hartford County; Lauren Hallinan, North Bay Legal Aid*
√ Building a Stable and Less Politically Driven Long Term Funding Base for Legal Services: *Victor Geminiani; Leanna Hart Gipson; Mike Pfeffer, California Indian Legal Services*
√ Joint Efforts with Business Groups: *David Phillips, Cincinnati Works; Abdul sm Rasheed, North Carolina Community Development Initiative (Invited)*
√ The Private Bar Resource: *Esther Lardent, The Pro Bono Institute*
√ Building Community in Low Income Neighborhoods and Rural Areas: *Speaker TBA*
11:15 AM - 12:30 PM Repeat of Concurrent Sessions
1:45 PM - 3:15 PM Skills Development: Participants Choose from Concurrent Development Workshops
√ Designing & Managing Large Projects - *Andrea Zigman, Legal Aid Society of Cincinnati*
√ Managing Change: Case Studies - *John Arango; Ayn Crawley, Legal Counsel for the Elderly*
√ The New England Experience: How the Region that has seen the Most Reorganization of Programs is Faring - *Andy Steinberg; Lonnie Powers*
√ Recruiting, Retaining and Motivating Staff - *Andy Steinberg, Western Massachusetts Legal Services; Lonnie Powers, Massachusetts Legal Assistance Corporation*
√ Hotlines, Pro Se and Technology (An Overview for those Unable to Attend the Following Conference.) *Gabrielle Hammond, Legal Aid Society of Hawaii*
√ The Texas Experience: How Programs in Our Host City and State are Coping with Change - *Jon Vickery, Legal Services of North Texas; Dwayne Bilton, Gulf Coast Legal Foundation*
3:30 PM - 4:45 PM Repeat of Skills Development Workshops
5 PM - 5:30 PM Closing Keynote - *John Dooley, Supreme Court, Vermont*

7 PM - 9 PM

Special Evening Session and Reception Open to Attendees from both *Managing Change* and *Innovations & Ethical Considerations*

Keynote Address: Proactive Change Within Legal Services

Forecast of Issues to be Covered in *Innovations & Ethical Considerations in Hotlines, Technology and Pro Se Delivery*

Interactive Session - Discussion of Key Points Addressed in *Managing Change* as well as an Update on What Is Happening for Legal Services in Washington, DC

Innovations & Ethical Considerations in Hotlines, Technology, and Pro Se Delivery - September 18-20, 1997

The American Association of Retired Persons, the Legal Services Corporation, Management Information Exchange, the American Bar Association Standing Committee for the Delivery of Legal Services, the State Bar of California and the National Legal Aid & Defender Association are pleased to host a new conference on delivery issues not fully addressed by other conferences. Discussions will focus on the interplay of four major content areas: Hotlines; Technology; Pro Se Delivery; and Legal Ethics. Included will be new developments, how-to information and advice on how to combine these systems into an effective delivery system.

- Legal Services Directors
- Staff managing or generating intake systems
- Court Administrators
- Lawyer Referral Program Administrators
- Bar Counsel
- Professional Responsibility Lawyers
- Academicians and others interested in legal ethics and the delivery of legal services
- Managing Attorneys
- IOLTA funders and program staff
- Law School Clinical Faculty
- Judges
- Bar Association Leaders
- Law Librarians

Friday, September 19

- 7:30 AM - 8:30 AM Registration and Coffee
- 8:30 AM - 9 AM Plenary Session
- 9 AM - 10:30 AM Concurrent Sessions Addressing:
- √ Phone Systems, Voice Mail, Teleconferencing Strategies
 - √ Telecommunications, Email, Internet, World Wide Web, Intranets
 - √ Groupware, "Team" Computing
 - √ Document Assembly
 - √ Hotline: Overview of Hotline Concept, Brief Cost Analysis, Basic Operations of Several Models
 - √ Pro Se: Problem Identification and Range of Models
 - √ Kiosks, Multimedia Technologies
 - √ CD-ROM, Knowledge Base Systems
 - √ Local Area Networks, Wide Area Networks
 - √ Computer Workstations, Implications of More Speed, Laptops, Palmtops
 - √ Hotline Issues: LSC Issues, Ethics Question, Basic Operations Roundtables
 - √ Pro Se: More Models, Stewardship Issues, Ethics Question
- 1:30 PM - 3:15 PM Repeated Technology Sessions
Combined Sessions Addressing:
Technology: Improving Client Access to Legal Help
Hotline: Links to Pro Se Programs and Overview of Intake Software
Pro Se: Technical Applications
- 3:45 PM - 5:15 PM Technology: Sharing Expertise Demonstration
Hotline: Staffing
Pro Se: How to Set Up a System, Part I
- 5:15 PM - 6 PM Combined Session on Funding Resources

Saturday, September 20

8 AM - 8:30 AM	Registration/Coffee
8:30 AM - 10 AM	Concurrent Sessions Technology: Improving Client Access to Legal Help Demonstration Hotline: Links to Pro Se Programs Pro Se: Technical Applications Technology: Improving Productivity Demonstration Hotline: Special Issue Roundtables (Conversion, Multilingual Hotlines, Special Populations, Evaluations, Funding Sources) Pro Se: How to Set Up a System Part 2 Pro Se: Showcase of Models and Materials
10:30 - 11:20 AM	Concurrent Sessions Technology Resources for Making it Happen Unbundled Legal Services Hotline Quality Control The Future of Pro Se and Technology
11:30 - 12:15 PM	Concurrent Sessions Using Technology for Program Resource Development Technology Resources for Making it Happen How to be a Good Consumer of Technology
12:15 PM - 1 PM	Closing Plenary

Logistical Information

Hyatt Regency Dallas at Reunion
300 Reunion Boulevard
Dallas, TX 75207-4498
(214) 651-1234
(800) 233-1234 Toll-Free Reservations

The special conference rate is \$120 single or double occupancy room. This rate is exclusive of sales and occupancy taxes. The rooms available at this rate will be assigned on a first-come, first-served basis. The deadline date for reservations is August 16. Requests for reservations after August 16 will be accepted on a space and rate available basis. All reservations must be guaranteed with a credit card or deposit.

Be sure to inform the reservation agent that you are with the *Effective Delivery '97* Conference in order to secure the conference rate. Even if you are only registering for the *Innovations* conference, tell the reservation agent that you are with the *Effective Delivery '97* Conference. The check-in time is 3 PM and check-out time is Noon.

NLADA has negotiated discounted airfares with United Airlines. While you may phone the airline directly, we encourage you to make your reservation through Connections Travel. Tickets we earn from conference participant ticket sales help keep costs down and we can pass savings on to you. Phone Connections toll-free at (800) 229-5250. If you phone United directly, call (800) 521-4041 and refer to Tour Code 511 L W.

Please answer all questions completely on the registration form and return with your check payable to NLADA or credit card information (MasterCard or Visa only) to: **NLADA Conference Office, 1625 K Street, NW, Suite 800, Washington, DC 20006**

Registration cancellations must be received in writing and postmarked no later than September 10. Refunds cannot be made for cancellations after September 10. No-shows with amounts due will be invoiced and expected to pay. Cancellations and refunds are subject to a \$30 administrative charge. Substitutions may be made at any time. Please notify NLADA of any substitutions in writing.

Registration Form

Return with appropriate payment to:
 NLADA Conference Office
 1625 K Street, NW, Suite 800
 Washington, DC 20006
 FAX (202) 872-1031 (Credit Card Payment ONLY)

Photocopy this form for a colleague
 One form per registrant!

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Innovations & Ethical Considerations in Hotlines, Technology and Pro Se Delivery
September 18-20, 1997

Name _____

First Name as You Wish it to Appear on Badge _____

Program _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ Email _____

Registration Fees

Please circle applicable fee. Membership will be verified.

	<u>Effective Delivery '97</u>	<u>Innovations & Ethical Considerations</u>	<u>Both Conferences</u>
NLADA Members	\$250	\$225	\$400
MIE Subscribers	\$250	\$225	\$400
Non-NLADA Members <input type="checkbox"/>	\$450	\$400	\$675
Non-MIE Subscribers	\$450	\$400	\$675

Payment Information

Make Check Payable to NLADA

Check Number _____ P.O. Number _____

Credit Card Number _____ Exp. Date _____

Signature of Card Holder _____

Printed Name of Card Holder _____

Please Complete Reverse

Please Complete the Following Brief Survey and remit to NLADA with your Registration Form:

Type of Program (check one)

- LSC-funded Other Legal Provider Private Law Firm Pro Se
 Court Lawyer Referral Program IOLTA Program Hotline
 Bar Association Other (please explain) _____

Indicate Your Primary Job Function

- Executive Director Managing Attorney Litigation Director
 Computer Specialist Case Handler/Attorney Hotline Manager
 Hotline Staff Case Handler/Advocate Intake Manager
 Law Professor Bar Association Staff Court Administrator
 Judge Law Librarian Pro Bono Coordinator
 Other (please explain) _____

1. Are There Interesting Ethics Opinions or Controversies from Your State on Unauthorized Practice, Telephone Advice, etc.? Yes No

Can We Contact You About the Issues Raised? Yes No

2. What is the Key Technology Topic You Would Like to see Addressed? _____

Please Indicate the Technologies Your Office Uses and the Relative Frequency of Use

Technology	Constantly				Rarely	Never
Intake Eligibility	1	2	3	4	5	6
Case Tracking & Record Keeping	1	2	3	4	5	6
Voice Mail/Teleconferencing	1	2	3	4	5	6
Internet/World Wide Web	1	2	3	4	5	6
Computer Assisted Legal Research (Westlaw)	1	2	3	4	5	6
Internal Email (___ % Staff Connected)	1	2	3	4	5	6
Document Assembly Software	1	2	3	4	5	6
Communicating with Other Programs	1	2	3	4	5	6
Desktop Publishing	1	2	3	4	5	6
Financial Budgeting/Planning	1	2	3	4	5	6
Other _____	1	2	3	4	5	6
Operating Platform (Check One)	<input type="checkbox"/>	MS DOS	<input type="checkbox"/>	PC DOS	<input type="checkbox"/>	Windows (3.1, NT, Windows 95 or 97)
Other _____						

Year in which your computer system was significantly upgraded: _____

3. If you have a hotline, is it: Intake Standalone

Service Area: Statewide Multi-county County City Wide

How long has the hotline operated? Since _____

Have you attended a hotline conference during the past 1 1/2 years? Yes No

What is the key Hotline topic you would like to have addressed? _____

4. If you run a pro se program, is it: Court-Based Program-Based

What is the key Pro Se topic you would like to have addressed? _____

Please contact me as I am interested in showcasing my program at the conference.