



**Building Community, Commitment and Excellence
in Legal Services Practice**

ANNUAL REPORT

January 2005

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Dear friends,

Five years ago, we launched the Legal Services Training Consortium of New England because we believed that legal aid clients are best served when advocates regularly develop the knowledge and skills necessary to provide high-quality and effective legal services. At that time, there were no regional or national structures to support legal aid training. And while standard bar association and continuing legal ed programs were available, these were often not relevant to or supportive of legal aid practice. In bringing together our twenty-four New England legal aid programs, we committed to building a training resource specifically geared to our community's unique mission, our commitments to equal justice and social equity as well as to the specific policies and laws that our advocates address and the forums in which they practice.

Beginning very modestly in 2000 with three regional training courses, we now boast a Core Curriculum of twelve courses that we offer on a regular annual or bi-annual cycle. These courses include an innovative mix of learning resources: case scenarios that are realistic and interesting; exercises that reinforce critical practice skills; videos that engage participants emotionally as well as demonstrating many facets of advocacy; and new web-based learning tools. Through our programming, we provide regular opportunities for new and experienced staff to learn from each other and develop and refine the knowledge and skills necessary to respond with expertise and flexibility to the many complex challenges our clients face.

We have also distinguished ourselves as a national model both through the success of our regional training structure as well as our innovative use of technology. With a national Technology Innovation Grant from the Legal Services Corporation, we recently launched Legal Aid University, the first national online training program of its kind. LAU has successfully piloted BLaST Online, the first online training course for the national legal aid community, and is now able to offer high-quality, low-cost training programs to legal aid organizations across the country, many of whom would otherwise be unable to provide *any* formal training to their staff. The launch of LAU will accrue direct benefits for New England training efforts.

Our network of friends and supporters also continues to grow. This year, we formalized our partnership with the American College of Trial Lawyers, with whom we now co-sponsor a bi-annual regional Trial Skills Training. We were also nominated for the ACTL's prestigious Emil Gumpert award that recognizes programs demonstrating exemplary service in maintaining and improving the administration of justice. Our friends at LSC and NLADA continue to reinforce our work, as do our other national supporters and partners.

This report documents our many 2004 accomplishments, our 2005 calendar of activities, as well as our ongoing work in several key strategic areas. None of this work would be possible without the ongoing commitment and support from our New England regional members and others around the country. We look forward to another exciting and productive year working with all of you.

Ellen Hemley
Director of Training
Massachusetts Law Reform Institute
Legal Services Training Consortium of New England

2004 Consortium Accomplishments

In many ways, 2004 was another “banner” year for us. In addition to sponsoring **five programs** in our Core Curriculum, including: **Administrative Hearing Skills, Trial Skills, Leadership & Justice, Basic Lawyering Skills,** and **Training for Trainers**, we also:

- Significantly upgraded **Basic Lawyering Skills Training** by creating a new case file relevant to current issues our clients face and incorporating content shared with us by Legal Aid University:
 - *Voices of Legal Aid*, a documentary film about legal aid advocates;
 - New exercises that teach critical skills for client interviewing, case analysis, strategy development, and client counseling.
- Hosted, in partnership with the American College of Trial Lawyers, our second **Trial Skills** training and expanded the program to include additional sessions on evidentiary issues and skills. Richard Zielinski, chair of the ACTL’s Committee on Teaching Trial and Appellate Advocacy, single-handedly recruited twenty ACTL “fellows” to participate in the 2004 event, in addition to five talented and experienced legal aid attorneys. In addition to four rigorous days of training and practice, participants also got to see a specially produced film of “Academy Awards of the Courtroom”, with clips from virtually every law-related movie, ranging from “To Kill a Mockingbird” to “My Cousin Vinny.”
- Sponsored our second annual **Leadership & Justice training**. The 2004 event included a number of substantive upgrades to the Leadership & Justice curriculum:
 - We streamlined the program by focusing more fully on five out of seven leadership “competencies;”
 - Participants each worked on their own, real-world leadership initiatives during the training;
 - Participants completed several pre-training activities, including a “leadership conversation” with an assigned partner.
- Sponsored “**Making the Connections**,” our first conference specifically for **support staff**. With twenty-two support staff attending, the conference included sessions on Intake Procedures, Working with Diverse Clients, Leadership Development, Career Development, Technology Development (Demonstrations of file management programs to understanding how the computer works), Understanding a Diverse Work Place, Office Management and the Changing Role of Support Staff in Legal Services.
- Sponsored our fourth annual “**Training for Trainers**”, presented by **David Cruikshank** of Paul Weiss Associates. With **PLI’s** support, close to **eighty legal services advocates** have attended one of the four **TOTs** over the last four years. These trainings have been instrumental in expanding our cadre of skilled legal services trainers and building increasingly diverse training teams.
- Developed comprehensive **training coordinator manuals** for several of our courses. Coordinator manuals systemize the many details required to present our trainings; this will make administration and management smoother and more effective.

2004 Consortium Accomplishments

- Updated the case file, training designs and other materials related to our “**Affirmative Litigation**” training in preparation for its May 2005 delivery.
- Participated in the December meeting of the re-instituted **New England Advocacy Directors** group. We also presented a session on Legal Aid University and our new “supervisor track” and will use the comments we received to shape this initiative

Strategic Objectives: 2005 & Beyond

Over the last five years, the Consortium's activities have expanded tremendously in terms of the number and scope of our programs, our use of technology and distance learning tools, and our role as a national resource. Beginning early last year, we undertook a planning process to re-examine our initial vision and develop new strategic objectives to guide us over the next five years. With input gathered from our members and other key stakeholders, we identified Consortium accomplishments to preserve and build upon as well as suggested improvements to our regional activities.

Key Accomplishments

Members identified the following areas as most important and about which they have the most pride:

- High quality & regular annual programs
- Steady expansion of "Core Curriculum"
- Innovation in training content & design
- Foundation of skilled advocates
- Vibrant community of learners
- Pool of skilled trainers

Suggested Areas for Improvement

Members identified the following areas to strengthen or expand:

- Develop strategies for increasing accessibility to training and lowering costs to ensure that all staff who need training can access it
- Expand programming that addresses needs of staff in hotline programs
- Consider additional regional programs on substantive and policy issues
- Expand programming to include follow-up for staff who have attended "basic" training programs, e.g., Discovery Practice 102.
- Develop mechanisms for increasing accountability between staff who attend Consortium events and programs that send them.

Reflecting on this input, we then examined three key strategic questions related to our vision for the Consortium "five years from now": **Educational content** (what we are teaching); **Training methods** (how we are teaching); and **Relationship to programs outside of our region**. Through this process, we committed to the following strategic objectives, many of which we are already addressing through our 2005 programming.

Consortium Strategic Objectives

1. Continue to sponsor courses in our Core Curriculum

We remain committed to delivering the courses we have developed and refined since our inception.

In 2005, we will sponsor the following Core Curriculum courses:

Strategic Objectives: 2005 & Beyond

- Community Lawyering (March)
- Affirmative Litigation (May)
- Leadership & Justice (July)
- Basic Lawyering Skills Training (November).

See “Calendar of 2005 Training Events,” below, for more information about these courses.

2. Expand courses to include additional audiences and content

In addition to our existing core curriculum, in **2005** we will offer two **new** courses:

- **Effective Hotline Service Delivery**, will include training on advice, counseling and brief service as well as other issues specifically related to hotline programs.
- **Support Staff Essentials and Beyond** will be our second annual conference targeted specifically for support staff in our region and the fulfillment of our commitment to offering an annual event for support staff.

3. Expand our commitment to fostering leadership diversity

Through our new **Leadership & Justice Initiative**, we will provide more structured and ongoing support to existing and emerging legal aid leaders. In **2005**, we will:

- Sponsor **Leadership & Justice 2: Essential Meeting & Facilitation Skills**
- Develop a **pilot mentoring program** that will pair emerging leaders in one program with experienced leaders in another program in our region.
- Sponsor our **introductory Leadership & Justice course**, this time with scheduled in-person and online follow-up over a twelve to eighteen month period.

4. Address substantive and service delivery issues

In **2005**, we will:

- Sponsor our **third annual Advocacy Symposium** on a topic to be identified;
- Provide logistical and other support to **New England Advocacy Directors** in preparation for their bi-annual regional meetings.

5. Build and strengthen community relationships

In **2005**, we will:

- Sponsor **Community Lawyering & Alternative Advocacy**, which addresses directly “community understanding and relationship building” as well as issues of difference -- between advocates and communities and within communities -- and the challenges of cross-cultural communication and relationship-building.

Strategic Objectives: 2005 & Beyond

- Strengthen existing **Leadership & Justice** curriculum, specifically sections related to working across differences and building community relationships.

6. Utilize technology to enhance learning

In-person events and the sense of community they foster have always been and will remain the cornerstone of Consortium training events. We do, however, hope to make use of modern technologies, especially web-based communications and community-building tools, when such technologies present superior learning opportunities. We believe adoption of online learning tools affords us greater flexibility in course design and delivery.

In **2005**, we will:

- **Use our new website** to distribute pre-training materials or conduct pre-training activities related to each of our regional events, such as self-assessments.
- **Provide follow-up support** to participants through alumni forums hosted on the LAU online campus.

7. Integrate learning and practice

Through new **Supervisor Tracks** that will run parallel to each of our existing and new courses, we foster an environment of mutual support and accountability between participants who attend our courses and the supervisors and managers who oversee their legal aid practice. The Supervisor Track will include resources designed specifically for supervisors that:

- Summarize key concepts and skills introduced in each of our courses
- Help them prepare staff for our courses
- Suggest methods to assist participants with integrating new concepts and skills into their day-to-day practice.

In **2005**, we will:

- Circulate **Supervisor Resources for the Basic Lawyering Skills Training** to project directors and supervisors of staff who attended the November 2004 BLaST event;
- **Develop additional Supervisor Track resources** for other events scheduled in 2005 including: Community Lawyering, Affirmative Litigation and Leadership & Justice;
- Present “**Supervisor Track**” **workshops** at meetings of Advocacy Directors in June and fall of 2005.
- Expand the **Supervisor section on the LAU website** to provide additional resources for supervisors and managers (www.legalaiduniversity.org/supervisors)

Strategic Objectives: 2005 & Beyond

8. Formalize relationships with non-member organizations

Over the past few years, our activities have attracted regional and national attention. For example, we began enrolling participants from outside the New England region in most of our courses. However, we have made a strategic decision to continue focusing on our New England members rather than expand to adopt a more national role. Therefore, **in 2005**, we will:

- Publicize our events to non-Consortium members and institute a separate registration rate for non-members attending our regional in-person events;
- Formalize our relationship to **Legal Aid University**, which will assume most of the responsibility of training staff of programs that do not belong to the Consortium

2005 Consortium Calendar

Following is a list of Training Programs confirmed for 2005. For additional information, including training announcements and registration forms, see www.legalaiduniversity.org/news

- Feb. 16 – 17 **Leadership & Justice II: Effective Meeting & Facilitation Skills**
Practice concrete tools and skills to facilitate more effective and efficient group processes, including: meeting planning, facilitation and collaborative problem-solving.
- March 29 – 31 **Community Lawyering**
Practice using a conceptual framework and specific tools through which legal aid advocates can effectively “contribute their legal knowledge and skills to support community-identified initiatives which return power to the community.”
- May 2 – 5 **Affirmative Litigation**
Develop skills necessary to plan and file an action in state or federal court, seek preliminary relief, and survive a motion to dismiss.
- June 9 – 10 **Support Staff Conference**
Build & reinforce skills and network with other support staff from across New England.
- June 14 – 15 **Advocacy Director Meeting**
- July 13 – 15 **Leadership & Justice 1**
Develop innovative, strategic and decisive responses to the many complex challenges and opportunities our communities face by learning skills necessary to: inspire and mobilize others; work across differences; build and effectively use networks of relationships; ensure group participation; and develop successful strategies and implementation plans to deliver on desired results.
- Sept. TBC **Effective Hotline Delivery**
Examine a number of challenges inherent in the hotline delivery model as well as the many “best practices” developed by hotline programs within the New England region and nationally.
- Nov. 2 – 5 **Basic Lawyering Skills Training**
Explore the culture, values and approaches that distinguish legal aid and practice specific skills including client interviewing, case analysis and strategy development, client counseling, negotiations, motions practice, alternative advocacy and trial skills.
- Dec. 3 – 4 **Advocacy Symposium**
The Advocacy Symposium will address a number of substantive or delivery-related topics

Appendix A: Online Learning & Legal Aid University



In late 2002, the Consortium applied for and was awarded, through member organization Legal Services Law Line of Vermont, a three-year national Technology Innovation Grant (TIG) from the Legal Services Corporation (LSC). Our original vision for this grant was that by modifying our training programs for an online environment, we would be able to make our courses available to legal aid programs around the country, particularly those in remote regions where in-person trainings are financially unfeasible.

Over the last two years, we not only successfully designed, piloted and officially launched our first online course, BLaST Online, but also developed significant expertise in the emerging fields of online learning and curriculum design. And as our understanding of and ability to exploit the vast resources available through web-based learning have grown, so too has our vision expanded to include a **national online campus** -- "**Legal Aid University**" -- that can provide learning resources to the broader legal aid and equal justice communities. In the first two deliveries of BLaST Online, we have been joined by new lawyers from Mississippi, Maryland, Florida, Alabama, Virginia, New Mexico, Illinois, Texas, and Washington, D.C. as well as from several of our New England states. LAU is well on its way to fulfilling its mission to: 1) design and present courses that strengthen legal aid attorneys' advocacy skills; 2) manage a national infrastructure to develop timely and high quality continuing education and disseminate these resources to the national legal aid community; and 3) sustain a nationwide commitment to excellence in legal aid practice.

Note: LAU courses are funded entirely by the LSC TIG and participant fees. No Consortium funds go towards LAU course development or deployment.

The LAU online campus not only benefits the national community, but also affords the Consortium with new capabilities that significantly expand our reach and increase our effectiveness within New England. For example, three new attorneys who missed or were unable to attend the BLST in-person course in November 2004 are now enrolled in BLaST Online on the LAU campus (<http://courses.legalaiduniversity.org>). In previous years, these participants would have had to wait close to a year before receiving crucial training in basic lawyering skills like interviewing, case analysis and counseling. LAU is also

What's Online?

Legal Aid University is hosting the Consortium's website at www.legalaiduniversity.org. On the site you can find:

- Our training calendar (www.legalaiduniversity.org/news)
- Descriptions of our core curriculum (www.legalaiduniversity.org/courses)
- A photo album of Consortium events (www.legalaiduniversity.org/photos)
- Songbook (www.legalaiduniversity.org/songbook)
- New resources for supervisors and alumni (throughout the site).

Appendix A:

Online Learning & Legal Aid University

hosting many web pages on behalf of the Consortium.

In order to best support the Consortium's regional focus and strategic objectives, we are currently examining potential options for structuring Legal Aid University as a national organization and clarifying the future relationship between LAU and the Consortium. Whatever the form of the relationship, we hope that the two organizations will continue to benefit from continued cooperation. Already, advancements made by LAU have directly benefited the Consortium through improved materials and exercises for the in-person BLST course, as described earlier on pages 5-6. Pedagogically, we expect to make more use of online tools in coming years, and LAU's pioneering efforts in that area will enable the Consortium to do so effectively and with minimal initial investment in technology infrastructure and support.

2004 Contributors & Volunteers

We wish to acknowledge and thank the many hard-working, committed, thoughtful and generous legal aid advocates, private attorneys and others who contribute hours, days and more to serve as trainers, Advisory Committee members and members of our many training design teams.

Consortium/LAU Staff & Consultants: We are also fortunate to have extraordinary staff and long-term consultants who work with us on both Consortium and LAU projects: Shari Zimble, Pamela King, Randi Smith, Gene Koo, Jim Breslauer, Deborah Hemley and Jessie Hill.

A hopefully complete list of our many volunteers follows, below.

Pro bono counsel: Ed Dailey, Bromberg & Sunstein, LLP

Regional Training Advisory Committee: Pat Rae, WMLS; Jacqui Bowman, GBLS; Allan Ells, MJP; Laurel O'Connell, NHLA; Hugh Calkins, PTLA; Karen Richards, VLA; Joanne Lewis, CLS; Liz Segovis, RILS; Allan Rodgers, MLRI.

LAU Executive Committee: Tom Garrett, LawLine; Hugh Calkins, PTLA; Gene Koo, LAU.

LAU National Advisory Committee: Lonnie Powers, Massachusetts Legal Assistance Corporation, Boston; Richard Zielinski, Goulston & Storrs, Boston; Joyce Alexander, Lone Star Legal Aid, TX; Ed Klonoski, Ct. Distance Learning Consortium, CT; Martha Bergmark, Mississippi Center for Justice; Karen A. Lash, Equal Justice Works, Washington, DC; Ayn H. Crawley, Maryland Legal Assistance Network/MLSC; Steve Leleiko, Practicing Law Institute, NY; David Cruickshank, Paul, Weiss, Rifkind, Wharton & Garrison, NY; Joyce Raby, Legal Services Corporation, DC; Gabrielle Hammond, National Technology Assistance Project; Hal Roberts, Berkman Center for Internet & Society, Harvard Law School; David Kahle, Tufts University Academic Technology; Ron Staudt, Chicago Kent University

Administrative Hearing Skills: Wendy Janett, consultant; Alex Cuprak, PTLA; Shirley Bergert, CLS; Pria Cloutier, CLS; Jennifer Huggins, GBLS; Peter Benjamin, WMLS; Randy Mezzy, CLS.

Affirmative Litigation – design committee: Jim Breslauer, NLS; Shelley White, NHLAA; Tom Kelley, PTLA; Greg Bass, GHLA; Lucy Williams, NU School of Law; Pat Rae, WMLS.

Trial Skills: Richard Zielinski, Goulston & Storrs; Robert Hemley, Gravel & Shea; Michael Angelini, Bowditch & Dewey; Ken Barnes, New Hampshire Legal Assistance; Anthony Doniger, Sugarman, Rogers Barshak & Cohen; Soffiyah Elijah, Harvard Law School; Bob Hallisey, Sally & Fitch; Larry Johnson, Davis Malm & D'Agostine; Michael Keating, Foley, Hoag; Bjorn Lange, Federal Public Defender, Concord, NH; Fran Morrison, Day Berry & Howard; Larry McGuire, Committee for Public Counsel Service; Harry Miles, Green, Miles, Lipton, White & Fitzgibbon; Michael Mone, Esdaile, Barrett & Esdaile; Robert Muldoon, Sherin & Lodgen; Elizabeth Mulvey, Crowe & Mulvey; John Pucci, Fierst, Pucci & Kinder; Faye Rachlin, Legal Aid of Corp of Central MA; Bruce Singal, Donoghue, Barrett & Singal; Max Stern, Stern Shapiro Weissberg & Garin; Richard Tucker, Bernstein, Burwick & Tucker; Phillip Walker, Day, Berry & Howard; Alvin Weiss, Porzio, Bromberg & Newman; Morristown, NJ; Martha Van Oot, Concord, NH; Albert Zabin, Duane Morris

2004 Contributors & Volunteers

Support Staff: Nilda Planas, CLS; Judy Santana, WMLS; Pamela King, MLRI; Allan Ells, MJP; Myra Hindus, Diversity Coalition; Marc Lauritson, consultant; Lynn Barenberg, BCLAB.

Leadership & Justice: Ross Dolloff, NLS; David Hall, NU School of Law; Julia Santiago, consultant.

Advocacy Directors coordinating group: Shelley White, NHLAA; Jonathan Manina, LACCM; Pat Rae, WMLS.

Training for Trainers: David Cruikshank, Paul Weiss Associates; Steve Leleiko, Practicing Law Institute.

Basic Lawyering Skills Online: Shari Zimble, MLRI; Gene Koo, LAU; Jim Breslauer, NLS; Wendy Janett, consultant; Bob Burdick, BU Legal Aid.

Basic Lawyering Skills In-person: Jim Breslauer, NLS; Shari Zimble, MLRI; Karen Richards, VLA; Janet Gilligan, RILS; Bruce Singal, Judd Esty-Kendall, PTLA; Young Soo Jo, LACCM; Liz Segovis, RILS; Bob Burdick, BU Legal Aid; Judges: Sergio Carvajal, LACCM; Allan Ells, MJP; Sandy Mayes, LACCM; Ellen Shachter, GBLS; Pat Rae, WMLS; Betsy Soule, SMLS.

BLST Online Videos: Alison Ruda, Kitchen Table Productions; Shari Zimble, MLRI; Gene Koo, LAU; Jim Breslauer, NLS; Mary Randolph, MLRI Board.

Leadership Story: Martha Bergmark, Mississippi Center for Justice; Allison Ruda, Kitchen Table Productions; Shari Zimble, MLRI.

Consortium Members

Connecticut Members

Greater Hartford Legal Services
Connecticut Legal Services
New Haven Legal Services

Maine Members

Pine Tree Legal Services
Legal Services for the Elderly

Vermont Members

Legal Services Law Line
Vermont Legal Services

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Massachusetts Law Reform Institute
Massachusetts Legal Assistance Corp
Merrimack Valley Legal Services
Neighborhood Legal Services
New Center for Legal Advocacy
South Middlesex Legal Services
Southeastern Mass. Legal Assistance
Western Mass. Legal Services
Volunteer Lawyers Project

Rhode Island Members

Rhode Island Legal Services