

**Essential Skills for Paralegals and Support Staff - Florida 2009:
Window Agenda**

DAY ONE – TUESDAY, APRIL 28

10:30 – 11.15	<p>Session 1: Welcome, Orientation, Introductions</p> <p>In a large group, the lead trainer or conference coordinator welcomes participants and introduces them to the general themes and goals of ESPLA, the ESPLA training team, and important logistical information. Through an interactive presentation, participants explore the history and vision of legal aid and the role of the non-attorney advocate in legal aid practice. Then a training team member or another speaker presents a personal reflection, modeling what participants are expected to do in the small group session immediately following, and explaining what brought them to legal services practice, why they have stayed, the benefits and burdens involved and their hopes for their careers.</p>	Large Group
11.15 – 12:00	<p>Session 2: Small Group Introductions and Reflections</p> <p>Participants meet in their assigned small groups. Trainers introduce themselves, welcome the group, and ask participants to introduce themselves. Trainers then describe the purpose of the small groups and how they will function, and generate a list of group norms and expectations for the training overall. The trainer then engages the participants in one to one discussion about their own reasons for joining legal aid, their hopes for their practices and what sustains them.</p>	Small Group
12:00 – 12:45	<p>Session 3 (a): Interviewing Presentation</p> <p>This session begins with the concepts of client centered whole client practice. It uses a short video depicting a client’s concerns as she is on her way to the legal services office. This is a jumping off point to think about the interview from the client perspective and to examine how we view our clients, and whether we are using a deficit or asset approach, and how to increase the latter. We extend this scrutiny to our view of the advocate and legal aid interviewer, and look at barriers to the advocate-client relationship as well as ways to overcome them. The presenter moves to an overview of the proposed stages in conducting an interview and goes through each stage. The large group ends with two demonstrations of an interview (good and bad) and a debrief.</p>	Large Group
12:45 – 1:45	<i>Lunch</i>	

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1:45 – 3:15	<p>Session 3 (b): Interview the Client in Our Case Participants move to their small groups to practice preparing for and conducting an initial client interview. In this session, the small group participants jointly and serially conduct a single interview of the client whose case will constitute a case study around which the training proceeds. Different participants conduct different parts of the interview with the faculty offering feedback and suggesting upgrades which can then be modeled by the following participant.</p>	Small Group
3:15 – 3:30	<i>Break</i>	
3:30 – 4:30	<p>Session 4: Working with Challenges in the Advocate-Client Relationship This session provides practical skills associated with the process of interacting with clients that challenge us in a legal services office. Specific challenges include:</p> <ul style="list-style-type: none"> • angry or oppositional clients - techniques for de-escalation • inebriated clients and those with substance abuse disorders • identifying common forms of mental illness and communications techniques for dealing with associated behaviors and communications barriers • techniques for assessing client decision-making capacity and the appropriate response when capacity is in question 	Large Group
4:30 – 5:15	<p>Session 5 (a): Advocate Track: Case Analysis and Planning Presentation – Our recommended approach to case analysis and planning:</p> <ul style="list-style-type: none"> • determine the client’s goals • identify a legal theory and legal authority capable of achieving those goals • parse the legal authority to its elements • determine the facts necessary to prove each element • identify potential proof that can be used to prove each element • develop a plan to acquire the proof 	Large Group (In Separate Paralegal / Secretary Tracks)
4:30 – 5:15	<p>Session 5 (b): Support Staff Track: Written Communication on Client Intake Summarizing and Communicating the Results of an Initial Client Intake Presentation – Basic guidance on and standards for the development of a written summary of an initial client interview as might be presented to an advocate as part of an intake. Participants work in triads to complete an intake memo to file based on the case scenario.</p>	Large Group

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5:15 – 6:00	<p>Session 5 (c): Small Group Exercises</p> <ul style="list-style-type: none"> • Advocates work through the case problem. They first discuss the client's goals. They then identify the appropriate legal authority, parse it, and identify essential facts and possible proof. • Support Staff use their small groups to write a follow up letter to the client with faculty providing critique and upgrades 	Small Group (By Tracks)
6:00 – 7:00	<i>Manager's Reception</i>	
7:00 – 8:00	<i>Dinner</i>	
DAY TWO – WEDNESDAY, APRIL 29		
8:30 – 9:00	<p>Day Two Welcome Review of agenda; orientation</p>	Large Group
9:00 – 10:00	<p>Session 6 (a): Fact Development, Informal Discovery, Investigation Presentation & Presentation of Evening Exercise This session explores the process of developing evidence and factual information in support of a case. It begins with a short presentation on internet based investigation; participant then participate in a process of conducting research on the web. The presenter accepts suggestions for developing evidence relevant to the case problem and pursues it using an internet connected computer projected to the audience. The session concludes with a discussion of public records access and privacy act access to client information held by governmental agencies.</p>	Large Group
10:00 – 10:15	<i>Break</i>	
10:15 – 11:15	<p>Session 7: Legal Ethics This session, designed for any non-lawyer professional in a legal services office, provides an overview of important ethics questions, how ethics impact non-lawyers, and offers constructive suggestions for keeping ethics in perspective. After soliciting ethical issues from the participants, the trainer offers an interactive presentation on core ethical issues which may include unauthorized practice of law, confidentiality and privacy, ethical relationship to the attorneys in the office and others. The presenter then breaks participants into small groups to consider the ethical response to 3 case studies. Participants then report back their conclusions which will be debriefed by the presenter. The case touches on understanding of the central topics covered in the presentation.</p>	Large Group

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11:15 – 12:15	<p>Session 8 (a): Difficult Conversations Presentation This session introduces participants to the Difficult Conversations framework, lets them see the framework in use, and practice using it. This session works best with two trainers for the overview and two trainers for each small group. Small groups should optimally have 5-6 participants. Prepare teams of 2-3.</p>	Large Group
12:15 – 1:15	<i>Lunch (with discussion tables)</i>	
1:15 – 3:00	<p>Session 8 (b): Difficult Conversations Exercises</p>	Small Group
3:00 – 3:15	<i>Break</i>	
3:15 – 5:00	<p>Session 9 (a): Paralegals Track: Finding, Interpreting and Using Legal Authority This session will begin with a presentation on:</p> <ul style="list-style-type: none"> • the kinds and hierarchy of legal authority • use of case authority • interpretation of cases • use of computerized legal research <p>Following the presentation participants break into small groups to read and analyze a series of legal authorities relating to the case problem. The group then reconvenes as a whole and debriefs the analysis exercise.</p>	Large Group (In Separate Paralegal / Secretary Tracks)
3:15 – 5:00	<p>Session 9 (b): Support Staff Track: Understanding the Litigation Process In this session participants discuss and interactively reflect on the component parts of the legal case. Participants are first given a series of adhesive paper blocks labeled with different parts of a legal case and work together to physically arrange the blocks in the order in which they occur in litigation. From this process a discussion begins about the actual mechanics of litigation and the group engages in a broad-based question-and-answer session in which the support staff participants have the opportunity to ask their own questions about the litigation process. After learning the process, participants apply the learning again through the "legal jeopardy."</p>	Large Group (In Separate Paralegal / Secretary Tracks)
6:00 – 7:00	<i>Dinner</i>	
After 7:00	<p>Session 6 (b): Web Based Fact Investigation Exercise Take 45 minutes or less in pairs or triads.</p>	

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DAY THREE – THURSDAY, APRIL 30		
8:30 – 9:15	Welcome, Review of Agenda, Orientation and Debrief of Fact Gathering Exercise	Large Group
9:15 – 11:00	<p>Session 10 (a): Paralegal Track: Putting on the Case – Applying Legal Authority Persuasively to Win Your Case</p> <p>This breakout session is a continuation of the topics covered in the prior one. Here, participants identify relevant legal authority and apply it in the context of its hierarchy. They then read two cases which must be understood together to appreciate their full meaning and are then asked to interpret them as a whole. Finally, participants craft and deliver a short closing statement applying the authority to the case problem.</p>	Breakout Groups
9:15 – 11:00	<p>Session 10 (b): Support Staff Track: Working with Customers Over the Phone</p> <p>This session is an interactive exploration of telephone best customer service practices with both presentation and practice components.</p>	Breakout Groups
11:00 – 11:15	<i>Break</i>	
11:15 – 12:15	<p>Session 11 (a): Time Management Presentation</p> <p>This session begins with the participants completing a short assessment questionnaire that reflects their current level of participation in effective time management practices. This assessment is followed by a paired brainstorm to identify time wasters in a legal services environment with a report back of the results. This exercise is followed by a presentation on time management best practices. The large group then breaks into its small groups to engage in an exercise in which participants prioritize and dispose of a set of typical items that a legal aid advocate must balance to manage their work.</p>	Large Group
12:15 – 1:15	<i>Lunch</i>	
1:15 – 2:00	<p>Session 11 (b): Time Management Exercises</p> <p>Participants in small groups engage in an exercise of prioritizing the various items in a mythical legal services worker’s inbox, selecting the order in which they will address the items and their proposed action steps for each item.</p>	Small Group

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2:00 – 3:15	Session 12: Working With and As Interpreters This session exposes participants to best practice both when serving as and working with ad hoc interpreters in legal services environment. The session will include both presentation and a number of interactive elements including a telephone game and interpretation exercise.	Large Group
3:15 – 3:45	Session 13: Closing Plenary In a large group, the lead trainer or conference coordinator thanks participants for their hard work and attention throughout the training. The lead trainer then samples the participants for short reflections on what they come away from the training with. The participants are then led on a plus delta evaluation, followed by an acknowledgment of the hard work of the trainers and the presentation of certificates to the participants by their small group leaders. Trainers will be presented with gifts as tokens of CLAE's appreciation and acknowledged.	Large Group