

Legal Services Training Consortium of New England 2003 Mid-Year Report July 2003

1) Overview of Programs & Activities – January - July 2003

a) Leadership & Justice: Thirty-two advocates attended our first delivery of Leadership and Justice presented in January '03. By all accounts the training was very successful and we were extremely excited by the enthusiastic participation of advocates throughout New England.

👉 **Redesign suggestions:** Based on input from participants and trainers, we will make at least two significant changes to the design: one is developing one or more **case studies** (something along the lines of the Community Lawyering training) that participants can work through during the training; the second is to design more time in facilitated small groups rather than rely as heavily on informal paired and small group exercises in the large group. We will also review the sequencing of the **values/vision/mission** session of the training – both in terms of how that worked (or didn't) in the January event as well as what we've learned through several activities that have come out of the Leadership and Justice training, regionally and nationally.

👉 **Follow-up:** We will reconvene the design group sometime during the summer to plan follow-up for the first group of participants as well as identify training needs and redesign issues for a second delivery in 2004.

b) Trial Skills Training: On Feb. 3 - 5, forty legal aid advocates attended the Consortium's first Trial Skills Training co-sponsored with the American College of Trial Lawyers. Connie Lane worked with us on the design and coordination of this event which was overwhelmingly successful. Consortium trainers (**Pat Rae**, WMLS, **Janet Gilligan**, RILS, **Ken Barnes**, NHLA and **Erika Brody-Tindall**, NHLAA) were all outstanding; we were also joined by **Cynthia Works**, Training Director at NLADA and **Soffiyah Elijah**, Clinical Instructor at Harvard's Criminal Justice Institute. **Richard Zielinski**, our ACTL liaison worked vigorously to recruit eighteen ACTL trainers, a core group of whom attended the full three day event. He has again committed ACTL resources to co-sponsor the program with us in 2004 and we will soon confirm a date and reconvene our design group. Based on feedback from both participants and trainers, we will likely expand the program from 3 to 4 days and add additional large and small group sessions focused on evidentiary issues.

c) Basic Lawyering Skills Training Twenty-four new legal aid attorneys attended BLST in March. BLST trainers included **Hugh Calkins** and **Judd Esty-Kendall** of PTLA, **Erika Brody-Tindall** of NHLAA, **Janet Gilligan** of RILS, **Jim Breslauer** of NLS and **Fran Fajana** of MLRI as well as **Robert Barge** of RILS who provided an inspirational keynote and introduction to legal aid, **Bob Burdick** of BU Legal Aid who presented the Negotiations session and **Neil Cronin** of MLRI who presented the session on Policy Advocacy.

d) Community Lawyering & Alternative Advocacy: We presented our first Community Lawyering training on May 22 - 24. Trainers and participants were all very engaged; the learning was deep and provocative. The video through which we introduce the case scenario was very successful and a model for future training events. I am attaching an article that Shari and I wrote (on very short notice) for MIE's fall volume which describes the process we went through in designing and presenting the training. Our design team has already met to begin redesign and we hope to present Community Lawyering again in 2004.

e) Distance Learning Institute: We have retained **Bob Burdick** of BU Legal Aid to work with us on curriculum design/re-design for the initial distance learning version of BLST. We will be working hard on this project this summer with a goal of completing the BLST curriculum redesign by the end of the summer. We have joined the Ct. Distance Learning Consortium (directed by one of our Distance Learning Institute advisory committee members) through which we have obtained inexpensive access to Blackboard.com, a well-established distance learning application provider. We will begin posting our BLST curriculum to this site in the very near future.

f) Website: We have begun developing our own website which will have its own "url" and interface but continue to be searchable through the national NLADA site. Web consultant Deborah Hemley (yes, related!) will be working with Hugh on this project. The site will include all of our curriculum and will include easier-to-use formats for downloading training designs and materials. The site will also include a calendar of upcoming events, registration information, photo albums and other materials related to completed events. It will also provide a link to the distance learning site once it is operational.

2) Upcoming Year 4 Activities

a) Training of Trainers:

October 23 - 24, 2003

We have confirmed our third annual Training of Trainers, to be presented again by David Cruikshank of Practicing Law Institute.

b) Case Planning & Discovery:

November 3 - 5, 2003

Wendy has begun working with design team members Joanne Lewis, Janet Gilligan, Karen Richards and Dick Bauer to review and make minor changes to the CP&D training. **This event is scheduled for November 3 - 5;** an announcement will be going out shortly.

c) Advocacy Coordinators Symposium:

December 2 - 3, 2003

We agreed to organize a 1 ½ day symposium for Advocacy Coordinators in New England; we will also invite Advocacy Coordinators from upstate NY and elsewhere, depending on interest and space availability. I will be convening a design group to begin planning this event

d) National support:

- 👉 Hugh and I will likely attend the November annual NLADA conference at which we'll offer at least one session which profiles the Distance Learning Institute and provides updates on new curriculum and access to other curriculum via the new website.
- 👉 Jim Breslauer, a member of our Affirmative Litigation training team, will serve as lead trainer at Maryland Legal Aid's delivery of Affirmative Litigation.

3) Reviewing Consortium Values & Vision:

a) Values: We reviewed and modified our core values (developed at the 5/29/02 meeting) to include explicit language about the relationship between training and diversity. Please review the follow suggested language and let me know what comments or suggestions you have regarding a final version.

Diversity: We believe that training is a vehicle for addressing diversity-related issues at the heart of our legal aid mission and values. To that end, we are committed to ensuring that our resources and programs support our community's overall diversity goals and that our training teams reflect our community's diversity.

b) Diversity-related Goals: In support of our diversity values, we agreed to the following:

- 👉 **Training of Trainers:** We agreed to do targeted outreach to advocates of color inviting them to attend the October Training of Trainers;
- 👉 **Developing new trainers:** We will continue to recruit talented advocates of color to work with us as trainers and design team members;
- 👉 **Leadership & Justice participants:** We will follow-up with advocates of color who attended the January Leadership and Justice training to assess what the impact of that training has been on their leadership development. Depending on interest, we will consider convening a follow-up meeting for advocates of color and/or all Leadership & Justice participants to explore leadership issues related to diversity. (Note this is one of the core values of the Leadership & Justice training and an aspect of the two of our leadership competencies – “Developing New Leaders” and “Achieving Workable Unity.”)
- 👉 **Increased diversity on Training Advisory Committee:** We will recruit additional advisory committee members, particularly from Massachusetts and Connecticut, who have worked on diversity issues and themselves bring additional diversity to our committee.
- 👉 **Collaboration with Mass. Diversity Coalition:** The Diversity Coalition recently developed a five year Diversity Action Plan which includes a number of goals directly related to our work. These include: **Creating leadership development opportunities** for staff in under-represented groups (including people of color and people with disabilities) by encouraging these staff to attend the Consortium's Leadership & Justice programs; **increasing the number of people of color and members of other under-represented groups in leadership** and managerial positions; and **building partnerships with diverse communities** (directly related to our Community Lawyering work) We will work closely

with the Diversity Coalition to ensure that our shared constituencies (e.g., our Massachusetts members) take full advantage of our Leadership & Justice and Community Lawyering resources and that the Consortium as a whole makes use of and builds upon the Diversity Coalition's significant accomplishments.

c) Reviewing Consortium Vision We reviewed the Consortium "vision," also developed at our 5/29/02 meeting, and noted specific accomplishments this past year which relate directly to items identified in the vision. Note that "vision" is meant to be a stretch; when much of the vision is achieved, it is time to develop a new vision which we will certainly want to consider at our fall meeting. See attached summary and comments on pages 7 - 9.

4) Identifying Year Five Activities

a) Training/development needs/resources assessment This summer, we will develop and circulate a training needs/resource assessment to all members so that we can both assess training needs and interests as well as gauge whether and to what extent anticipated budget cuts will impact Consortium membership and/or participation in upcoming events. We will review the results of this assessment at the October meeting and make a final determination as to Year Five (2004) programming at that time.

b) Preliminary Agreements for Year Five Activities

☛ **Support Staff Programming** We agreed to develop programming for support staff to be offered in Year Five. Pamela King will lead that project and will begin shortly surveying both support staff and managers regarding potential issues and resources to include.

☛ **Trial Skills:** We will offer Trial Skills again in 2004. See comments related to Trial Skills in #2b, above.

☛ **BLST:** We will decide whether to offer BLST earlier or later in 2004 once we have completed the needs/resource survey.

☛ **Administrative Hearing Skills:** Unless our survey results suggests otherwise, we will offer AHT sometime in 2004.

c) Additional programs/activities to consider

☛ **Leadership & Justice.** We hope to offer this program again in 2004; to be confirmed at October 03 meeting.

☛ **Community Lawyering** – We hope to offer this program again in 2004; to be confirmed at October 03 meeting.

5) General membership issues

- 👉 **New England Project Directors:** Allan and I will attend the October 16 regional Project Director meeting to report on Year 4 accomplishments and seek commitments for Year 5 membership.

NOTE: The following notes from our 5/29/02 Advisory Meeting describe our vision for the future direction of the Training Consortium. The comments in boxes reflect achievements accomplished this past year related to specific sections of the “vision”

Legal Services Training Consortium Vision *excerpted from 5/29/02 Advisory Committee Meeting Summary*

“The Consortium in Five Years” As part of our strategic planning process, we engaged in a visioning exercise in which we imagined the Consortium five years from now and responded to the following questions from that vantage point:

- 👉 What kinds of activities do we offer?
- 👉 What kinds of resources do we provide
- 👉 What about the Consortium stands out?
- 👉 What are people around the region, country saying about us?
- 👉 Who are our partners?
- 👉 What contributions are we making to the legal services community?

Following are responses to the above questions grouped by categories.

I) Substantive

- 👉 We team up with national centers to provide substantive training.
- 👉 There is more emphasis on substantive law training within the Consortium
- 👉 There are regular regional meetings of advocates on selected substantive law topics, e.g., section 8 conference

COMMENT: We sponsored our first Advocacy Symposium **“Seeking Justice for Unrepresented Litigants”** in September 02; MLRI’s Housing Coalition invited New England advocates, residents and organizers to attend the May ‘03 event **“Reclaiming Public Housing”**.

ii) Core Curriculum

- 👉 We are still developing new programs for the Core Curriculum and continue to refine and update existing programs in the Core Curriculum.
- 👉 We still provide a regular schedule of core programs on annual or bi-annual cycle.
- 👉 We provide three innovative topical trainings each year.

COMMENT: We piloted three new curricula in '03 – **Leadership & Justice, Trial Skills & Community Lawyering.** Regarding our regular schedule, our '03 offerings will include the above 3 new programs as well as **BLST, Case Planning & Discovery,** and **Training of Trainers.**

iii) Evaluation



We effectively document how training improves advocacy on behalf of clients



We provide effective feedback to trainers and support their ongoing development as trainers.

COMMENT: We regularly summarize evaluations from each of our programs and share these with our trainers. We will resume our post-training evaluations this summer and will also explore additional evaluation options through our Distance Learning project.

iv) Local delivery



There are regular and successful local deliveries of Core Curriculum events (via distance learning, modules adapted for local delivery, technical assistance)



There is an extensive resource library of training materials that is regularly used by programs around the region to support local deliveries.

COMMENT: We received a three-year **LSC national technology** grant through which we are developing distance learning options for our core curriculum. We are also modifying our website to provide easier access for Consortium members and others. Hugh reports that Consortium materials get regular “hits” on the NLADA website and we respond regularly to requests for training materials from programs around the country.

v) Innovations



Our songbook & “Best of Legal Services” CD is known throughout the land!



We have developed various training modules and approaches for helping staff successfully address issues of difference – among clients, between clients and staff, among staff.

COMMENT: Regarding the first bullet, our most recent song “*Ode to Samuel Scrod*” (to the tune of the Beatles’ *Revolution*) was videotaped at the Community Lawyering training and will be available on our soon-to-be-upgraded website; we also have footage of our Trial Skills trainers - legal aid and American College lawyers alike – singing the closing song (to the tune of “*The Impossible Dream*”) which will also be posted on the website. So our vision of “known throughout the land” may not be so far off!

Regarding the second bullet, our **Leadership & Justice** training explicitly addresses issues of difference in two of our core competencies – “Achieving Workable Unity” and “Developing New Leaders” -- and our **Community Lawyering** training includes a session on “**Identity and Difference**” which will be re-worked and possibly expanded for the 2004 delivery. We also developed a training program, through a grant from the Massachusetts Developmental Disabilities Council, on “Working with Clients with Functional Limitations” which was offered in May 2003. Materials from that training and a final report on the project will be posted on the website.

vi) **Alternative Advocacy Approaches**

We continue to support alternative advocacy approaches through a range of different training programs and opportunities.

COMMENT: We piloted **Community Lawyering & Alternative Advocacy**. See attached article to be included in the fall MIE journal.

vii) **National**

- ☞ We are a national model for distance learning
- ☞ We are the same size as now, same resources - not part of national consortium.

COMMENT: Our accomplishments this year speak for themselves!

viii) **General**

- ☞ Training is an integrated part of how people practice and relate to each other
- ☞ We have more staff with adequate administrative support, more funding & fundraising capability and offices for all who need them!

ix) Potential partners We work in partnership with a number of different entities such as MIE; ABA - legal aid section; NLADA; National substantive law centers; Protection & advocacy centers; LSC; Local bars - provide substantive trainings, attend some of our trainings; State CLEs; American College of Trial Lawyers; Practicing Law Institute; American Trial Lawyers Association, others with knowledge of our clients, clients themselves, funders

COMMENT: This year we successfully partnered with the **American College of Trial Lawyers** in sponsoring the first annual Trial Skills Training; we contributed an article about the Community Lawyering training to **MIE**; we also contributed two chapters (one on *Cross-Substantive Representation*, the other on *Representing the Whole Client*) to the **National Center on Poverty Law's Poverty Law Manual for New Lawyers**; **Practicing Law Institute** continues to support us by funding David Cruikshank's presentation of the two day Training of Trainer program; **PLI** will also provide resources to the Distance Learning project); **Funders** (Don Buchholtz of **United Way** participated in our Community Lawyering Training); **NLADA** hosts our website and also provided training assistance through their participation as trainers at two of our events – Bonnie Allen at Leadership & Justice and Cynthia Works at Trial Skills; Camille Holmes of **Center for Law & Social Policy (CLASP)** also participated on our Community Lawyering Design team and served as a trainer at Leadership & Justice and Community Lawyering; **LSC** provided us with a three year grant to develop the Distance Learning Institute.

x) Contributions



- T-shirts, mugs, umbrellas!
- Integral part of legal services practice
- We are role models for others around the country.

COMMENT: Our **T-shirts** are famous and come in three colors; we have a **mug** marking the occasion of the first Trial Training (“I object to injustice”); we have a banner; but alas no umbrellas!