

# Conference Agenda

\*The Hilton Hotel is just a short walk from the Westin Charlotte.

## Schedule of Events

### Wednesday, November 8

- 2:00 p.m. - 5:00 p.m.  
Conference Registration – *Providence Promenade*
- 2:00 p.m. - 5:00 p.m.  
Exhibitor Showcase – *Promenade*
- 4:00 p.m. - 5:00 p.m.  
Orientation for First-Time Attendees
- 5:30 p.m. - 8:30 p.m.  
Opening Assembly and Annual Meeting of Members

### Thursday, November 9

- 7:30 a.m.  
Continental Breakfast
- 7:30 a.m. - 5:30 p.m.  
Conference Registration and Exhibitor Showcase
- 8:30 a.m. - 10:00 a.m.  
Civil, Defender and Client Caucuses
- 10:15 a.m. - 11:45 a.m.  
Joint Caucus
- Noon - 1:15 p.m.  
Joint Luncheon & Affinity Groups
- 1:45 p.m. - 3:15 p.m.  
Sessions
- 3:30 p.m. - 5:00 p.m.  
Sessions
- 6:00 p.m. - 11:00 p.m.  
Host Committee Reception

### Friday, November 10

- 7:30 a.m.  
Continental Breakfast
- 7:30 a.m. - 5:30 p.m.  
Conference Registration and Exhibitor Showcase
- 8:30 a.m. - 10:00 a.m.  
Sessions
- 10:15 a.m. - 11:45 a.m.  
Sessions
- Noon - 2:00 p.m.  
Awards Luncheon
- 2:15 p.m. - 3:45 p.m.  
Sessions
- 4:00 p.m. - 5:30 p.m.  
Sessions
- 6:00 p.m.  
Enjoy Charlotte!

### Saturday, November 11

- 7:30 a.m.  
Continental Breakfast
- 7:30 a.m. - Noon  
Conference Registration and Exhibitor Showcase
- 7:30 a.m. - 8:15 a.m.  
Women of Color Project Directors & Friends
- 8:00 a.m. - 10:30 a.m.  
ACCD Meeting
- 8:30 a.m. - 10:00 a.m.  
Sessions
- 10:30 a.m. - Noon  
Closing Session
- 1:00 p.m. - 3:00 p.m.  
AAPDA Minority Project Directors Meeting

## Monday

9:00 A.M. - 6:00 P.M.

LSC Leadership Mentoring Pilot Program

Room: Gwynn (Hilton Hotel)

## Tuesday

8:00 A.M. - 4:30 P.M.

Train the Trainers: Fresh Approaches to Adult Learning for Trainers in the Legal Aid and Indigent Defense Communities

Room: Graham (Hilton Hotel)

9:00 A.M. - 4:30 P.M.

MIE New Executive Director Training

Room: Graves (Hilton Hotel)

9:00 A.M. - 4:45 P.M.

LSC Leadership Mentoring Pilot Program

Room: Gwynn (Hilton Hotel)

6:00 P.M. - 8:00 P.M.

LSC Leadership Mentoring Pilot Program Dinner

Room: Graves (Hilton Hotel)

## Wednesday

8:00 A.M. - 4:30 P.M.

Train the Trainers: Fresh Approaches to Adult Learning for Trainers in the Legal Aid and Indigent Defense Communities

Room: Ardrey (Hilton Hotel)

8:30 A.M. - 1:30 P.M.

LSC Leadership Mentoring Pilot Program

Room: Gwynn (Hilton Hotel)

9:00 A.M. - 4:30 P.M.

MIE New Executive Director Training

Room: Graves (Hilton Hotel)

10:00 A.M. - 2:00 P.M.

Massachusetts Legal Assistance Corporation

Room: Caldwell



# Conference Agenda

## Wednesday

4:00 P.M. - 5:00 P.M.

### Orientation for First-time Conferees

Room: Trade

5:30 P.M. - 6:30 P.M.

### Opening Assembly and Annual Meeting of the Members

Room: Grand Ballroom CD

6:30 P.M. - 8:30 P.M.

### Opening Reception

Room: Ballroom Foyer

## Thursday

8:30 A.M. — 10:00 A.M.

### Civil Caucus

Room: Grand Ballroom CD

This annual forum of providers of civil legal assistance will serve both to feature national updates of general interest to the civil legal aid community and to kick off the civil track: "Immigration and Civil Legal Services". The track will explore the huge demographic and legal shifts facing providers across the country that are seeing applicants from a variety of cultures, speaking languages new to the region and, potentially, competing with preexisting low-income communities for extremely scarce legal resources. These immigrants face a host of legal problems: difficulties with the U.S. Citizen and Immigration Services; the threat of deportation; access to public benefits, education and health care; family violence; and the tricky intersections of civil, criminal and immigration law issues, to name a few.

Michael Fix, vice-president and director of studies at the Migration Policy Institute (MPI) in Washington, will address the caucus and provide an overview of the most significant demographic and policy issues that civil providers should consider in fashioning effective delivery responses. Michael is one of the nation's leading scholars and activists regarding immigration issues. His colleague, Margie McHugh, co-director of MPI's National Center on Immigrant Integration Policy, will outline the Center's efforts around education, work-skill development and interaction with local and state governments around local settlement regulatory initiatives. Reaction from the legal aid community will be included in the caucus.

### Defender Caucus

Room: Grand Ballroom B

The Defender Caucus is an annual gathering of the defender community to discuss issues and share experiences and

strategies. NLADA will provide national updates on issues of concern for the defender community, including recent indigent defense reform efforts, the ABA's Ethics Opinion 06-411 on Excessive Caseloads, the National Right to Counsel Committee; leadership and management development opportunities; and other NLADA initiatives. Community members will offer insights on these issues and other topics of interest. Whether you are a public defender, an assigned counsel, a sentencing advocate or mitigation specialist, an administrator, an investigator, or a private criminal defense attorney, the Defender Caucus will provide you with an opportunity to meet your colleagues from around the country, and to contribute to the future development of on-going NLADA initiatives. Join us for a lively and vibrant discussion, and to rejuvenate and prepare to explore the many learning opportunities that NLADA's Annual Conference provides!

### Client Caucus

Room: Grand Ballroom A

The Client Caucus launches the Client Track and brings together clients, community based leaders and client eligible board members, and other people living in low-income communities. The Client Caucus affords an opportunity for clients to address issues arising in the civil legal aid and defender contexts that affect low-income people and communities. Join the caucus for a dynamic presentation by Jo-Ann Wallace, NLADA president & CEO. The caucus will also hear presentations about important developments around the Civil *Gideon* movement, NLADA's agenda to reform and improve public defense, and the importance of developing effective communications strategies.

10:15 A.M. — 11:45 A.M.

### Joint Caucus

Room: Grand Ballroom CD

Joint Caucus

This first Joint Caucus is an opportunity for the unified equal justice community of civil legal aid, indigent defense, and client advocate communities to come together and share observations, concerns and ideas on topics of shared interests. Let's learn from one another by discussing national developments that reverberate throughout our community. The passage of the ABA Resolution supporting a Defined Right to Counsel in civil matters & its relationship to the Unfulfilled Promise of Gideon, immigration, juvenile justice, and reentry of formerly incarcerated persons all provide areas of potential collaboration. Join us to gain a greater understanding of how our unified community can come together to serve clients holistically and more effectively.

# Conference Agenda

## Thursday

1:45 P.M. — 3:15 P.M.

Noon — 1:15 P.M.

### Joint Luncheon

**Room:** Grand Ballroom CD

This year's Joint Luncheon is geared toward building better connections within our community. In response to several requests for affinity group meetings and networking opportunities, we have structured this time as to allow for members of our community to share information about their work - NLADA sections, affinity groups looking to build connections across subject matter areas, and much more.

**Here's how they work:**

1. Grab a box lunch (if you have purchased a Luncheon ticket).
2. Find a section meeting, affinity group or topic oriented meeting on the following list.
3. Networking with your colleagues.

### Advocacy and Support Section Meeting

**Room:** Grand Ballroom B

### Amicus

**Room:** Tryon North

### Civil Gideon

**Room:** Sharon

### Civil Legal Aid National Training Meeting & Agenda

**Room:** Harris

### Katrina/Disaster Preparedness

**Room:** Park

### LawHelp.org Networking Meeting

**Room:** Independence

### Loan Forgiveness

**Room:** Tryon South

### LSC/Non-LSC Partnerships

**Room:** Morehead

### Mental Health, Substance Abuse and Homelessness

**Room:** Kings

### National Organization for Client Advocates I

**Room:** Grand Ballroom A

### Reentry and Collateral Consequences

**Room:** Trade

### Removal and Immigration Issues

**Room:** College

### Rural Issues

**Room:** Queens

### Crisis Communications: If It Crawls, Kill It

**Room:** College

When the newspaper includes the name of your 13-year-old client who's been arrested for the first time ... distortions and accusations leveled against your organization... a lawyer's breach of ethics ... What do you do? Join a panel of savvy front line attorneys and media experts who will help you transform a negative situation into a positive one.

*Elizabeth Arledge, Communications Consultant; Pat Bath, Legal Aid Society of New York; Seymour James, Legal Aid Society of New York; Tamara A. Steckler, Legal Aid Society of New York*

### Program Assessment: Great Programs and How We Know Them!

**Room:** Dunn (Hilton Hotel)

"Evaluation" is a term funders love. This session will explore how we can translate that love into proactive steps that ensure evaluation pays off for our clients and programs. Panel participants will share their experiences in applying the results of evaluation tools in ways that produce better performance on mission, more dollars, and greater community understanding and support.

*Ken Smith, The Resource for Great Programs; Robert Oakley, Northwestern Legal Services; Cathy Carr, (Philadelphia) Community Legal Services; Matt Weber, The Resources for Great Programs; Michael Campbell, Pennsylvania Health Law Project*

### Keeping Your Quality Attorneys: Loan Repayment Assistance Programs Can Make a Difference

**Room:** Graham (Hilton Hotel)

Recruiting and retaining quality attorneys in civil legal aid and defender organizations is an essential component of fostering communities of justice, hope and opportunity. Loan Repayment Assistance Programs (LRAPs) that assist public interest attorneys with their higher-than-ever educational debt is a significant factor in hiring and keeping quality attorneys. This session will provide participants with an overview of LRAP developments at the state, federal, employer and law school levels. Come prepared with your questions and plan to participate in a lively discussion on this critical topic.

*Heather Jarvis, Equal Justice Works; Cynthia Schneider, Legal Services Corporation; Julie Strandlie, American Bar Association; Kelly Carmody, Carmody & Associates; Irene Morales, Island Counties Legal Services*



# Conference Agenda

## Thursday

1:45 P.M. — 3:15 P.M. (Continued)

### Communications & Community I: Nuts & Bolts



**Room:** Grand Ballroom A

Communications is a critical capacity for creating and sustaining community-based change efforts. The ability to get the attention of newspapers, television and radio can make the difference in the effectiveness of community-based advocacy campaigns. Learn the nuts and bolts of developing and implementing a communications campaign.

*Stacy Mayuga, Agricultural Retailers Association*

### Civil Gideon: Defender Lessons for the Civil Community on How to Manage with a Right to Counsel

**Room:** Grand Ballroom B

As the legal aid community considers establishing the right to counsel in civil cases, it needs to take into account related funding, management and ethical problems. Leaders of public defender programs will share their experiences and lead a discussion about these challenges and how to address them.

*Andrew Steinberg, Nonprofit Management Consultant; Susan Storey, Division of Public Defender Services; Nancy Bennett, Committee for Public Counsel Services; Jim Neuhard, State Appellate Defender Office, State of Michigan; David Carroll, NLADA; Alan Houseman, Center for Law and Social Policy*

### LSC Updates

**Room:** Harris

LSC President Helaine Barnett will discuss recent and upcoming LSC activities.

*Helaine Barnett, Legal Services Corporation*

### The Office of the Juvenile Defender and Ensuring Quality Representation for the Smallest Voices



**Room:** Independence

The Office of the Juvenile Defender in N.C. is a unique institution charged with providing services and support to defense attorneys, evaluating the current system of representation and making recommendations as needed, elevat-

ing the stature of juvenile delinquency representation, and working with other juvenile justice actors to promote positive change in the juvenile justice system. The session will describe the challenges presented in achieving these goals and specific projects and collaborative effects to achieve quality representation for children and adolescents in delinquency court.

*Eric Zogry, Office the Juvenile Defender, Indigent Defense Services*

### Fostering Cultural Competence: Bringing Justice and Hope to all Communities

**Room:** Kings

How do providers and practitioners that have made the commitment to cultural competence foster that competency within their organization and colleagues? How do you find training on cultural competence for your legal services office? Learn the elements of the new ABA Standard on Cultural Competence and practical advice for developing and offering training to increase cultural awareness among your staff and colleagues. Specific examples of culturally competent management techniques and programs including hotlines, immigration programs, and legal aid programs serving new immigrant communities for the first time.

*Lillian Moy, Legal Aid Society of Northeastern New York; Tanya Douglas, Manhattan Legal Services; Claudia Cloindres Johnson, Bay Area Legal Aid; Susan Bryant, CUNY School of Law*

### Ensuring Community Development by Getting Community-Based Nonprofits the Legal Assistance They Need

**Room:** Morehead

Workshop presenters represent volunteer lawyer nonprofit legal assistance programs, a law school community economic development clinic and a law firm. Presenters will discuss client eligibility and screening, client referral practices, substantive services provided, discrete services v. general counsel models, the lawyer-client matching process, difficulties, and success stories.

*Tom Kelley, University of North Carolina School of Law Community Development Clinic; Jennifer Howle, Mecklenburg County Bar Volunteer Lawyers Program; Regina Hopkins, The District of Columbia Bar Community Economic Development Pro Bono Project; Debbie Segal, Kilpatrick Stockton LLP*

Joint Civil & Defender Track —

Defender Track —

Civil Track —

Client Leadership Track —

Board Leadership Track —

# Conference Agenda

## Thursday

1:45 P.M. — 3:15 P.M. (Continued)

### The Private Right of Action to Enforce Federal Laws — Hanging by a Thread?

**Room:** Park

Ever since *Cort v. Ash*, 426 U.S. 66 (1975) imposed new limits on "implied" rights of action and *Pennhurst* placed limits on rights of action under 42 U.S.C. § 1983, the Supreme Court has narrowed opportunities for advocates to enforce federal laws prescribing civil rights, environmental, educational and other guarantees. In *Gonzaga University v. Doe*, 536 U.S. 273 (2002), the Court tightened the screws on § 1983 to their current setting. This workshop will review post-*Gonzaga* precedents applying both § 1983 and preemption theories, to help advocates sort out the most promising strategies and minimize the risk of further evisceration of private enforceability.

*Rochelle Bobroff, National Senior Citizens Law Center; Simon Lazarus, National Senior Citizens Law Center*

### Retooling Pleas and Sentencing: How to Use Collateral Consequences and Reentry Goals to Improve Outcomes

**Room:** Park

Knowledge of collateral consequences is critical for defenders and can result in better pleas, dispositions and sentences. Planning from the moment of arrest can avoid or mitigate some of the harmful effects. Several practical tools and strategies now exist to help defenders advocate more effectively and will be explained in this workshop.

*Tom Johnson, Council on Crime and Justice; McGregor Smyth, The Bronx Defenders; Marianne Yang, NYSDA Immigrant Defense Project; Alan Rosenthal, Center for Community Alternatives*

### Models for Increased Cooperation Between Legal Services and Defender Programs to Benefit Clients

**Room:** Trade

This session will discuss the benefits of cooperation between legal services and defender programs including: (1) improved representation; (2) using the increased knowledge and resources of the combined programs to offer holistic representation; and (3) strengthening support for both programs. The session will discuss examples of cooperative relationships and suggest ways to establish partnerships.

*Malcolm Ray Hunter, Jr., N.C. Office of Indigent Defense Services; George R. Hausen, Jr., Legal Aid of N.C.*

### Bridging Communities for Effective Sentencing Presentations

D

**Room:** Queens

Effective representation demands knowledge of the issues and problems surrounding community networking. In particular, the strong association between community involvement and persuasive sentencing advocacy demands that practitioners create and maintain collaborative relationships to use resources effectively. Collaboration is a powerful way to enhance representation, increase awareness of and access to community resources and stretch resources to assist the client. The session will focus on techniques to tap into these resources for effective sentencing advocacy.

*Melissa Kupferberg, Integrated Mitigation & Investigations; Lori James-Monroe, L. Y. James and Associates, inc.*

### The Jericho Project: An Indigent Defense Alternative to Mental Health Courts

**Room:** Sharon

Join us to discuss a flexible, best practice approach to the complex problem of jail diversion for indigent defendants with serious mental illness, designed for use in regular courts before regular judges. Presentation will demonstrate effective defense strategies to link clients to quality community treatment and services without compromising rights or client dignity.

*Stephen C. Bush, Office of the Shelby County Public Defender; Rick Crane, Comprehensive Counseling Network; Amanda Smart, Shelby County Government; Adam Kirkman, GAINS/TAPA Center for Jail Diversion*

### The Demographics of Immigration and the Legal Issues Facing Immigrant Populations

C

**Room:** Mecklenberg (Hilton Hotel)

This session will follow-up in depth on the most significant demographic and policy issues raised by Michael Fix and Margie McHugh in the Civil Caucus presentation regarding the delivery of civil legal services to immigrant populations. In addition, immigration law experts will discuss the legal issues facing various immigrant populations in North Carolina and elsewhere in the country.

*Michael Fix, Migration Policy Institute; Margie McHugh, Migration Policy Institute; Allan Parnell, Cedar Grove Institute for Sustainable Communities*



# Conference Agenda

## Thursday

1:45 P.M. — 3:15 P.M. (Continued)

### Retooling Pleas and Sentencing: How to Use Collateral Consequences and Reentry Goals to Improve Outcomes

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### Partnership for Child & Family Safety: A Collaboration between Legal Aid & Child Protective Services for Families Faced with Domestic Violence

**Room:** Brevard

Discussing a new collaborative effort to get legal services and domestic violence assistance to those who need it most—our children. Legal Aid Society of Columbus works side by side with Child Protective Services by offering all of their resources to families where domestic violence appears and foster care is likely.

*Don Roberts, Legal Aid Society of Columbus; Rosalind McGary, Legal Aid Society of Columbus; Linda Wilkins, Franklin County Children Services*

### Language Access Laws 101: Ensuring Hope in Immigrant Communities through Civil Rights Advocacy for English Language Learners

**Room:** Tyron South

The session will examine federal civil rights laws and successful advocacy efforts based upon them. Presenters will explain the basics of federal law (Title VI, HHS and DOJ guidances, etc). In addition, presenters will describe successful advocacy efforts that have resulted in increased opportunities for LAP's in the area of healthcare, government benefits and other area of the law. We will briefly cover the LSC LEP guidance and ABA standards as well.

*Susan Lee, Neighborhood Legal Services of Los Angeles; Kate Meiss, Neighborhood Legal Services of Los Angeles; Jane Perkins, National Health Law Program; Gillian Dutton, Northwest Justice Project*



### Law and Organizing: Partnering with Community Members and Grassroots Organizations to Foster Communities of Justice, Hope and Opportunity

**Room:** College

Despite popular misconception, LSC-funded programs can organize using other sources of funding without running afoul of regulations. This workshop will highlight how legal services organizations can use "Law and Organizing" as an effective approach to empower communities to speak out for themselves and have a critical voice in decisions that impact their lives. We will rethink the appropriate role of lawyers in social justice struggles in order to forge more effective, creative ways to build community capacity where litigation is an integral (but not necessarily primary) component of a multi-faceted strategy to empower communities.

*Betty Hung, Legal Aid Foundation of Los Angeles; An Le, Koreatown Immigrant Workers Alliance; Victor Narro, UCLA Labor Center*

### The ABA/Pro Bono Net Volunteer Opportunities Guide

**Room:** Walker (Hilton Hotel)

This session introduces a national database of pro bono program volunteer opportunities searchable by program, name, location, practice area and other criteria. Programs are able to maintain their descriptive information through a web interface. We will demonstrate the Guide, answer questions and solicit suggestions for expanding and improving the resource.

3:30 P.M. — 5:00 P.M.

Joint Civil & Defender Track —



Defender Sessions —



Civil Track —



Client Leadership Track —



Board Leadership Track —



# Conference Agenda

## Thursday

3:30 P.M. — 5:00 P.M. (Continued)

### What Funders Want (Clue - It's Not Just a Grant Proposal)

**Room:** *Dunn (Hilton Hotel)*

For most funding sources, engagement with the prospective grantee is as important as a well written proposal. Drawing from their significant fundraising experience, the presenters will discuss how to talk effectively about your program, develop a proposal that will engage the funder, and demonstrate that you are providing critically needed services that improve people's lives. This session is for executive directors and managers who would like to become more effective at attracting funding.

*Jim Barrett, Pisgah Legal Services; Alex Gulotta, Legal Aid Justice Center*

### Coaching to Lead: The Leaders' Link to Leadership



**Room:** *Graham (Hilton Hotel)*

The field of coaching has long been part of the corporate world and more recently it is bursting into other professional areas including the legal arena. Coaching provides an excellent means for professional businesses to maximize on their unique professional goals and for individuals to rapidly achieve their personal agendas for growth, opportunity and personal development. Participate in this session, with an executive leadership coach and life strategist as they share an innovative learning model for leaders and emerging leaders to promote their skills and abilities. Join us, as we examine leadership styles and the diverse roles of leaders and emerging leaders in the workplace. Discuss key attributes of personal excellence and professional performance including the impact of these on career goals and objectives. Identify the achievable, tangible and immediate results that can strengthen your leadership skills both in diverse organizations and in your own personal life and community. Examine ways to engage in powerful conversations that impact client and peer relationships. Access three specific strategies that lead to an improved work-to-life balance designed to enhance your career.

*M. Parker Anderson, The Anderson Advantage Group; Dan Martinage, The Association Coach*

### Communications & Community II: Practical Applications



**Room:** *Grand Ballroom A*

An interactive session designed to give participants the opportunity to practice using proven communications techniques. This hands-on session will afford each participant an opportunity to practice and improve their ability to effectively convey strategic messages.

*Stacy Mayuga, Agricultural Retailers Association*

### Community-Based Sentencing Advocacy: The North Carolina Sentencing Services Model



**Room:** *Trade*

The NC Office of Sentencing Services administrates a consortium of non-profit and state programs, advised by local boards that prepare pre-plea, alternative sentencing plans for criminal defendants. The programs maintain knowledge of available treatment resources and recommend individualized, creative sentencing options for clients. Sentencing Services had transformed from a group of five nonprofits serving limited localities to a network serving the entire state, but recent legislative actions have reduced the scope and reach of the organization. This presentation will describe how the organization works, its inception and evolution, and how the problems it has faced might be averted.

*Susan E. Brooks, Office of Sentencing Services; Carolyn Bidwell, Office of Sentencing Services; Kathy Johnson, Office of Sentencing Services; Lao Rubert, Carolina Justice Policy Center*

### LSC Quality Initiatives: Focusing on the Future

**Room:** *Harris*

LSC has several quality initiatives underway, including LSC Performance Criteria, Leadership Mentoring Pilot Project, revision of the CSR Handbook, and a renewed focus on private attorney involvement, among other activities. This session is designed to share information on the status of these initiatives and to seek input from participants to continue to fully inform these activities.

*Kamala M. Vasagam, Legal Services Corporation; Karen J. Sarjeant, Legal Services Corporation; Cynthia Schneider, Legal Services Corporation; Michael Genz, Legal Services Corporation*



# Conference Agenda

## Thursday

3:30 P.M. — 5:00 P.M. (Continued)

### Juvenile Justice Reform: Teaming Up to Advocate for Clients Inside and Outside the Courtroom



**Room:** Independence

Defenders can bring together multiple partners to provide more comprehensive and effective advocacy on behalf of their clients both in and out of the courtroom. Come learn about successful efforts as well as how defenders may approach and work more effectively with advocates. Panelists will lead an interactive discussion regarding: 1) Information on the Campaign for Youth Justice state policy work; 2) North Carolina's Public Defender Services launch of a new statewide Defender Network and their work on juvenile justice reform efforts; and 3) Examples of how defenders can become collaborators to achieve more comprehensive representation.

*Liz Ryan, Campaign for Youth Justice; Jessica Sandoval, Campaign for Youth Justice*

### Legal Needs Assessment... How to Translate the Numbers into Action that Benefits Clients and Raises Dollars

**Room:** Johnson (Hilton Hotel)

Many states are updating their statewide legal needs assessment, and local programs and projects are applying a range of methods to assess the needs of the people they serve. This session will review the tools being used and present practical examples of recently-completed assessments to show how this work can help program leaders acquire a comprehensive understanding of community needs and deliver on the program's mission.

*Ken Smith, The Resource for Great Programs; Kelly Thayer, The Resource for Great Programs; Harold Creacy, Ocean-Monmouth Legal Services, Inc.; Adriana Agudelo, Ocean-Monmouth Legal Services, Inc.*

### Innovations in Civil Legal Services

**Room:** Kings

Workshop presenters will briefly describe model program and innovative practices within their legal services programs. Through this workshop session, we hope to encourage the cross-fertilization of good ideas as an important step to increase access and ensure high-quality legal assistance. We plan to present information about

legal services management and delivery approaches. We will include program models and innovative techniques to facilitate greater access to the client community.

*Monica Holman Evans, Legal Services Corporation; Patricia Pap, Management Information Exchange; Jan Allen May, AARP Legal Counsel for the Elderly*

### Using Public Information and GIS to Empower Disenfranchised Communities

**Room:** Brevard

Using data from several case studies, presenters will discuss applications, availability, and access of public data and GIS (Geographic Information Systems) to help community activists and attorneys find patterns; combine information from different data sources; create graphics to demonstrate points; and compare situations in different locales or populations

*Ann Moss Joyner, Cedar Grove Institute for Sustainable Communities; Allan Parnell, Cedar Grove Institute for Sustainable Communities; Ilene Jacobs, California Rural Legal Assistance; Mona Tawatao, Legal Services of Northern California*

### Civil Right to Counsel: The ABA has Spoken; What Happens Now?

**Room:** Sharon

In August, the ABA House of Delegates unanimously passed an historic resolution endorsing the right to counsel in civil matters involving basic human needs. This interactive roundtable will focus on how best to utilize that resolution as well as how to harness the energy of state access to justice commissions in continuing advocacy for a civil right to counsel.

*Debra Gardner, Public Justice Center; Hon. Deborah Hankinson, ABA Standing Committee on Legal Aid and Indigent Defendants; Terrance J. Brooks, ABA Division for Legal Services; Robert Echols, ABA Resource Center for ATJ Initiatives*

# Conference Agenda

## Thursday

3:30 P.M. — 5:00 P.M. (Continued)

### The Medical Professional: Evaluating the Impact of the Newest Member of the Advocacy Team

#### Room: Park

Medical-Legal partnerships are emerging as an important service delivery model for communities. By collaborating with healthcare professionals, advocates provide onsite legal services, train health care providers and advance systemic advocacy targeting vulnerable populations. This session will describe medical-legal partnership, current evaluation efforts and how advocacy impacts health outcomes.

*Ellen Lawton, Medical-Legal Partnership for Children, Boston Medical Center; Randy Retkin, New York Legal Assistance Group; Diane Pappas, University Medical Center-University of Virginia*

### History of Civil Legal Services in the South

#### Room: Grand Ballroom B

Join this distinguished panel for a discussion on the history of legal services in North Carolina and the southern region over the past forty years. The South has a rich history of legal advocacy, civil rights battles and innovative poverty lawyers. During the second half of the twentieth century, Southern legal services advocates experienced tangible gains for their clients in cases involving federal, state, and local social programs, low-income housing, consumer rights, domestic relations, and civil rights. They also confronted the limits of the American legal and political system in its institutional and cultural boundaries and its limitations of will. Come reflect on this story of successes and failures, and consider how it relates to the future of justice for all in America.

*Kenneth Schorr, Legal Services of Southern Piedmont; Theodore Fillette, Legal Aid of North Carolina; Kris Shepard, local attorney and author; Richard Taylor, North Carolina Academy of Trial Lawyers; Mel Watt, U.S. Representative, (D-NC)*

### Designing a Presentation In the Age of the Short Attention Span

#### Room: Queens

Depending on which study you look at the average adult attention span ranges from 8 seconds to a maximum of 20 minutes. This session will address this issue and provide practical techniques for presenters looking to design a session which will engage the audience, increase retention and allow the presenter to track the progress of the learning as the session progresses. The session is designed to be beneficial to both the occasional presenter and full-time trainers. The fast moving format will model a large variety of teaching techniques and provide the participants with new options and ideas for use in their presentations.

*Jeff Sherr, Kentucky Department of Public Advocacy; Phyllis H. Subin, Phyllis H. Subin, Esq. LLC*

### A Practical Guide to Establishing Holistic Defender Offices: Lessons from Around the Country

D

#### Room: Morehead

Across the country public defender agencies are representing clients inside and outside the courtroom, helping them meet both legal and life challenges. This panel discusses how agencies - one lawyer at a time - can make a broader, holistic approach to advocacy part of their office's DNA.

*Kirsten Livingston, Brennan Center for Justice at NYU School of Law; Robin Steinberg, The Bronx Defenders; Paul DeWolfe, Jr., Office of the Public Defender for Montgomery County; John J. Hardiman, Rhode Island Office of the Public Defender*

### Low-Wage Worker Advocacy for Legal Services Attorneys

C

#### Room: Tryon North

Low-income workers are routinely exploited and denied basic labor protections. This session will provide instruction on federal wage and hour rights and enforcement mechanisms and address common state laws and remedies. Panelists will discuss alternative service models including direct and class representation and successful clinic models utilizing volunteers.

*Keith Talbot, Farmworker Project and Low Wage Worker Employment Rights Project; Anel Flores, Legal Aid Foundation of Los Angeles; D. Michael Dale, Northwest Workers' Justice Project*

### Language Access: Serving Limited English Proficient (LEP) Clients 101

C

#### Room: Tryon South

Programs that have already established LEP policies face numerous challenges in their administration. A number of legal services programs have developed a series of "best practices" in their effort to integrate their mandatory obligations and their program's resources to address the needs of their clients and client communities who are limited English proficient. The "best practices" include policies, practices and strategies to assess client language needs and legal issues, staff employment, collective bargaining agreements, changing standards or practice and potential "errors and omissions, evaluation/testing of current practices, the manager's role in overseeing these issues. This interactive workshop covers actual practices, from legal and non-legal arenas, along with their concomitant success and/or failure in meeting program, client and staff expectations.

*Joann H. Lee, Legal Aid Foundation of Los Angeles; Sunil Mansukhani, District of Columbia Access to Justice Commission; Dimple Abichandani, Legal Services for New York City (LSNY); Paul M. Uyehara, Community Legal Services, Inc.*

# Conference Agenda

## Thursday

3:30 P.M. — 5:00 P.M. (Continued)

### Financial Responsibilities of the Nonprofit CEO: How to Safeguard Your Legal Aid Program

*Room: Walker (Hilton Hotel)*

Legal aid organizations provide services of such great importance that the community dedicates time and money to achieve their purposes. Legal aid CEOs are guardians of these resources and must effectively carry out their own and their board's financial responsibilities. Learn best practices on topics such as: staffing the financial department, staff training, effective executive oversight, preventing problems, what your board needs to know about your finances and their responsibilities.

*Gerry Singsen, Singsen and Tyrrell Associates; Mary Asbury, Legal Aid Society of Greater Cincinnati*

3:30 P.M. — 6:00 P.M.

### The Trials of Darryl Hunt Showing

*Room: Mecklenburg (Hilton Hotel)*

5:00 P.M.

### Defenders Trainers Section Meeting

*Room: Queens*

### National Organization of Client Advocates II

*Room: Grand Ballroom A*

5:00 P.M. — 6:30 P.M.

### Latino Directors Section Meeting

*Room: Tryon South*

### Native American Section Meeting

*Room: Tryon North*

6:00 P.M.

### Host Committee Reception

*Room: Grand Ballroom CD*

## Friday

8:30 A.M. — 10:00 A.M.

### Tools for Tomorrow, Today: The Role of Technology in Promoting and Supporting Pro Bono

*Room: Brevard*

Two of the most challenging aspects of managing a pro bono program are volunteer recruitment and support. Information technology has proven to be an effective tool in addressing both of these challenges. This session will provide an overview of state and national volunteer attorney recruitment and support tools, projects and collaborations, as well as real world examples of models and best practices from individuals who have employed innovative uses of technology to support their pro bono programs.

*Matthew J. Burnett, Pro Bono Net*

### Boards & Public Relations: Effective Communications Practices

*Room: Collee*

Recent developments in the legal services and public defender community illustrate the role that boards of directors can play in public relations. Boards have a role to play in the communications strategy of an organization. Strategic communications by board members can make an impact on public opinion, funder and government relations, and community support.

*Deborah Dubois, NLADA; Melanie Herman, Nonprofit Risk Management Center*

### Client Grievance Procedures: An Interactive Dialogue

*Room: Grand Ballroom A*

The Legal Services Corporation recently issued a notice of a proposed rule change for its regulation dealing with client grievance procedure - Part 1621. LSC requires programs receiving grants to establish grievance procedures for applicants for services and clients so that they can pursue complaints related to the denial of legal assistance or dissatisfaction with the legal services provided. The regulation is intended to help "ensure that legal services are accountable to those whom they are expected to serve." This interactive session is designed to promote greater understanding of the regulation and the proposed rule change.

*Don Saunders, NLADA; Linda Perle, CLASP; Harry Johnson, Indiana Legal Services*

# Conference Agenda

## Friday

8:30 A.M. — 10:00 A.M. (Continued)

### Fostering Better Media Relations



**Room:** Grand Ballroom B

In this session, participants will hear from journalist and author Kevin Davis who went behind the scenes to observe and interview lawyers in the Murder Task Force of the Cook County Public Defender's Office for his new book, "Defending the Damned." The panelists include public defenders who cooperated with Mr. Davis and spoke freely about their work and their lives for his book. This session will use examples from Mr. Davis' book as a springboard to discuss how working with the media can be valuable to all public defenders, and go a long way to help remove some of the stereotypes of the profession. The session will include a roundtable discussion with questions and answers.

*Marijane Placek, Cook County Public Defenders Task Force; Kevin Davis, Author/Journalist; Julie Norman, Capital Mitigation & Forensic Consultation; Allan Sincox, Office of the State Appellate Defender*

### Long-term Contingency and Continuity Planning: Providing Legal Assistance to Underserved Populations Affected by Significant Disasters

**Room:** Harris

This workshop will discuss how the legal profession can prepare to respond to significant disasters, from the national level to the individual program, including practices, procedures and policies to facilitate the delivery of legal services to persons and organizations affected by such disasters by legal services and pro bono providers.

*Anthony Barash, ABA Center for Pro Bono; Rani Newman Mathura, Cummings & Lockwood; Karen Lash, Equal Justice Works/Mississippi Center for Justice; John C. Eidleman, Legal Services Corporation*

### Disaster Planning for Business Continuity



**Room:** Independence

A large segment of our population is talking about disaster and planning for disaster, but few are doing anything about it. Do not be satisfied with that fire drill you participated in last month! That is great start. Know your emergency evaluation code. When you drill, drill like your life depended on it. That is just the start what happens when you cannot go back into your building? What do you do? Where do you go? Who do you talk to? When do you make provision for business continuity? The plans you make now may save you time and money later ... may save your life. Can we talk? Co-sponsored by the American Council of Chief Defenders' Best Practices in Leadership and Management Committee.

*Edwin A. Burnette, Law Office of the Cook Public Defender; Lauren B. Simon, Law Office of the Cook Public Defender*

### Creatively and Collaboratively Addressing Emerging Client Needs

**Room:** Kings

This session will explore approaches to addressing emerging client needs by marshalling community resources to meet those needs. It will explore a series of initiatives in DC in which emerging needs are effectively addressed by creatively utilizing hotlines, staff attorneys, brief services units, pro bono panels and court annexed services.

*Jan Allen May, AARP Legal Counsel for the Elderly; Maureen Thornton Syracuse, DC Bar Pro Bono Program; Natalie Wasserman, AARP Legal Counsel for the Elderly*

### Determining Indigence and the Cost-Effectiveness of Financial Verification



**Room:** Park

Indigency determination plays an important role in managing caseload for a public defender office. But are leaving many people whose incomes are well above the poverty level choosing to represent themselves in court. Accuracy in screening plays a critical role in ensuring fairness for those seeking the assistance of counsel who otherwise cannot afford it. How do we strike an efficient and effective balance between the two? What new approaches have we seen cropping up in the past year? How do these affect defenders? How do they affect clients? This panel discussion will offer important information applicable to each and every jurisdiction.

*Richard Goemann, NLADA; David Carroll, NLADA; Emily Chiang, ACLU; John Stuart, Minnesota State Public Defender*

### Using the ABA Principles of a Civil Justice System

**Room:** Providence I

In August, the American Bar Association adopted "10 Principles of a State Civil Justice System." This session will briefly review the principles and explore how they can be used as a tool for improving and expanding access to civil justice at the state level.

*Jim Neuhard, (Michigan) State Appellate Defender Office; Lillian O. Johnson, (Arizona) Community Legal Services, Inc.; Alan Houseman, Center for Law and Social Policy; Kathleen Brockel, Law Access New Mexico; Robert Echols, ABA Resource Center for ATJ Initiatives*



# Conference Agenda

## Friday

8:30 A.M. — 10:00 A.M. (Continued)

### Pro Bono Policy and Analysis: Looking to the Future

**Room: Providence II**

This session will discuss a number of state policies that have been implemented within the past few years geared toward expanding pro bono. A "behind the scenes" look at the development of these policies, strategies for implementation and lessons learned will be discussed. Using a roundtable discussion format, this session will be particularly useful for those interested in learning how to implement policies that can change the culture of pro bono statewide.

*Jon Asher, Colorado Legal Services; Sarah Singleton, Montgomery & Andrews, P.A.; Shelia Meehan, Florida Legal Services; Dina Merrill, Chicago Bar Foundation*

### Executive Directors and Development Directors Working Together: Fundraising for Legal Services

**Room: Providence III**

What should executive directors expect of development directors? What do development directors need from their executive directors in order to be effective? How do you recruit and retain an effective development director? Session presenters include executive directors and development directors from two programs at different levels of fundraising experience. Join this discussion and go home with some new ideas to try!

*Catherine Carr, Community Legal Services, Inc.; Richelle Ogle, Community Legal Services, Inc.; Melissa Pershing, Legal Services Alabama; Char Jones, Legal Services Alabama; Meredith McBurney, ABA Resource Center for ATJ Initiatives*

### TIG 2006 Showcase

**Room: Queens**

This session will showcase projects funded in the 2006 round of LSC's Technology Initiative Grant (TIG) program: the integration of case management systems and statewide websites, the development of Web-based intake systems, developing national capacity for Spanish language document assembly and the expansion of the LiveHelp project. The session will provide updates on NTAP, LSTech.org, NPADO (the national HotDocs production server), and cyber piracy in the legal services community.

*Joyce Raby, Legal Services Corporation; Glenn Rawdon, Legal Services Corporation; Karen Sarjeant, Legal Services Corporation*

### Supreme Court Highlights: Recent Criminal and Habeas Decisions that Advocates Need to Know



**Room: Sharon**

The speakers will review each major criminal decision of the Supreme Court's last term. The analysis will include a discussion of the facts of each case, its holding, and policy implications for justice in America. Participants will be encouraged to comment on cases arising in their states. Materials will be distributed.

*Marshall J. Hartman, IIT Chicago - Kent College of Law; Lawrence A. Benner, California Western School of Law*

### Immigration Law 101



**Room: Tryon North**

This session reviews the basics of present federal immigration law (who is allowed to live and work in the United States), with a focus on the family and employment based options available under present law. The session will also discuss immigration law enforcement, and legal representation for individuals facing removal (being deported). The session will also discuss the implications of the "Secure Fence Act of 2006." Attendees do not need any prior immigration law experience.

*Milo Mumgaard, Nebraska Appleseed*

### Advanced Language Access Roundtable: Ensuring Hope in Immigrant Communities through Civil Rights Advocacy for English Language Learners



**Room: Tryon South**

Using hypothetical situations and interactive discussion, we will examine successful (and unsuccessful) advocacy efforts with federal civil rights laws. The facilitators and audience will explore advocacy efforts, organizing, and litigation strategies in various regions, states and settings. The goal is to advance experienced advocate's understanding and networking in this field.

*Kate Meiss, Neighborhood Legal Services of Los Angeles; Susan Bryant, City University of New York School of Law; Juliet Choi, American Red Cross*

# Conference Agenda

## Friday

10:15 A.M. — 11:45 A.M.

### If You Don't Do Media, Media Will Do You

**Room:** Brevard

This session will seek to demystify "Media Relations" and show legal aid staff and board members how strategic media outreach can enhance the work of their programs by helping them to: frame the way important issues are perceived by key audiences, increase fundraising and political success by increasing awareness of the work that they do in their communities, and improve outreach to client communities. Specific learning will include: message development, the five creating a media strategy' and basic rules for working with reporters.

*Elizabeth Arledge, Communications Consultant; Adriene Holder, The Legal Aid Society (New York City); Patricia Bath, The Legal Aid Society (New York City); Joe Surkiewicz, The Legal Aid Bureau (Maryland)*

### Change the Paradigm: How to Integrate your Website with your Delivery System

**Room:** Caldwell

Over 50 states and territories have now created a statewide website. This workshop will hear from legal aid leaders across the country who are integrating these websites into various aspects of their program's service delivery system and will share practical ways to utilize these websites as tools to achieve your own service delivery goals.

*Liz Keith, Pro Bono Net; Patrick McClintock, Iowa Legal Aid*

### Are You Aware of Your Legal Duties as a Board Member?

**B**

**Room:** College

Are you and your board fulfilling its legal duties and responsibilities? Boards and commissions of legal services organizations and public defender organizations have the same legal duties of other non-profit organizations: duty of care, duty of loyalty, and duty of obedience. This interactive session lays a foundation for understanding the core legal obligations of boards of directors.

*Melanie Herman, Nonprofit Risk Management Center*

### The Diversity within Our Diversity: Race, Ethnicity & Poverty

**L**

**Room:** Grand Ballroom A

Too often race and ethnicity are used to divide communities of color in their fight against economic and racial injustice. Efforts to pit African-American, whites, Latinos, and Asian Pacific Islanders against each other creates bar-

riers to needed partnerships & collaboration. Successfully mobilizing across and within the diversity of the community of low-income clients, advocates, and leaders increases the effectiveness of efforts to empower low income communities. An interaction session focused on positioning low-income communities for increased communication, partnership and collaboration across differences of race and ethnicity.

*Juliet Choi, American Red Cross; Charles Wynder, Jr., NLADA*

### The New ABA Ethics Opinion: Managing Excessive Defender Caseloads

**D**

**Room:** Grand Ballroom B

This session will examine how individual defenders and public defender offices with excessive caseloads balance their ethical duty to provide competent representation with their responsibility to serve their backlog of assigned clients. Also, panelists will explore how the impetus provided by the Ethics Opinion can lead to much needed caseload reform.

*Bob Boruchowitz, The Washington Defender Association; Ardena Garth, Public Defender's Office of the 11th Judicial District in Tennessee; Malcolm Ray Hunter, North Carolina Office of Indigent Defense; Norman Lefstein, ABA Standing Committee on Legal Aid and Indigent Defendants and Indiana University School of Law; Ross Shepard, The Spangenberg Group; Phyllis H. Subin, Phyllis H. Subin, Esq. LLC*

### The Social and Economic Effect of Latino Immigrants on Small Towns and Rural Areas

**C**

**Room:** Graves (Hilton Hotel)

Outside of the spotlight of urban American, rural communities that draw Latino immigrants seeking work in poultry and meat processing are undergoing rapid demographic, economic, and cultural transformations. Few Latinos lived in these communities in 1990, but by 2000, a quarter or more of their populations was Latino. The proposed session documents the rapid social and demographic transformation of these communities, assesses the economic impact on the communities, identifies strategies for dealing with pressures from the immigrants in the local schools and health care system, and presents ways in which community leaders have addressed challenges of cultural diversity.

*Allan Parnell, Cedar Grove Institute for Sustainable Communities; James H Johnson, Jr., University of NC at Chapel Hill*



# Conference Agenda

## Friday

10:15 A.M. — 11:45 A.M. (Continued)

### Justice, Hope and Opportunity for Battered Woman through Statewide Partnerships between Legal and Advocacy Groups

**Room:** Kings

Legal aid and domestic violence programs work against odds to provide high quality, comprehensive services to battered woman. However, in some locations, programs duplicate services, compete for money or work in uncomfortable, ineffective alliances. This workshop will showcase a unique, highly successful statewide partnership collaborating in all facets of service: representation, screening, training, grant applications and decisions. Presenters will detail how strategic planning, purposeful partnership and combined resources have led to better and increased services. Practical tools will be provided to help participants replicate the model in their program.

*Cathy Wallace, Legal Aid of West Virginia; Angie Rosser, West Virginia Coalition Against Domestic Violence*

### Developing and Using Effective Law School Partnerships

**Room:** Park

This session will cover the challenges and rewards of partnering with law schools in order to increase legal assistance to clients. Panelists will engage participants in a discussion of both the challenges of working with law school constituencies and the strategies to overcome them. Presenters will explore various models which integrate law students into the delivery of legal services, including short and long-term pro bono projects, semester-long internships, paid summer clerkships and research assistance.

*Melanie Kushnir, ABA Center for Pro Bono; Pamela DeFanti Robinson, University of South Carolina School of Law; Alex R. Gulotta, Legal Aid Justice Center; David Yoder, Legal Aid of East Tennessee*

### Access to Justice Roundtable

**Room:** Providence I

This "nuts and bolts" session is aimed at states with an Access to Justice or similar state-level entity, as well as states that are planning to create one. Participants are invited to share questions, challenges and accomplishments. Possible issues include staffing and funding Access

to Justice entities and initiatives, building buy-in and support, and dealing with "culture clashes" among participants.

*Robert Echols, ABA Resource Center for ATJ Initiatives*

### Standards for Civil Legal Services

**Room:** Providence II

This session will provide an overview of how the new ABA Standards for the Provision of Civil Legal Aid are most relevant to provider programs. It will explore what changes were made in the recently-revised Standards and describe opportunities for programs to use the Standards to enhance quality. Drafters and programs/users will discuss how the Standards can be incorporated into program practices and trainings.

*Sarah Singleton, Montgomery & Andrews, P.A.; John A. Tull, Consultant; Linda Zazove, Land of Lincoln Legal Assistance Foundation, Inc.*

### Client-Centered Advocacy: Communication Skills for Working with People in Poverty

**Room:** Providence III

Have you ever been frustrated by a client's decision? Or felt like your time is not valued when a client is a no show? Participants will gain a better understanding of the challenges faced by clients living in poverty and learn specific skills to reduce frustration and increase effective advocacy work for clients.

*Alison Paul, Montana Legal Services Association; Dana Toole, MSW, Montana Legal Services Association*

### Immigration Reform: Where Do We Go From Here?

**Room:** Tryon North

This session will focus on the 109th Congress' election-year passage of legislation to build a 700 mile fence along the U.S.-Mexico border and increase workplace enforcement, and how this presently passes for immigration "reform." This panel will discuss more comprehensive options that combine tough border and workplace enforcement measures with more worker and family visas and a path to citizenship for most undocumented immigrants in the U.S., and address myths and facts around immigration reform.

*Milo Mumgaard, Nebraska Appleseed*

# Conference Agenda

## Friday

10:15 A.M. — 11:45 A.M. (Continued)

### Language Access: Serving Limited English Proficient (LEP) Clients



**Room:** Tryon South

This session is for programs that already have LEP policies in place and are in the advanced stages of dealing with internal language access issues. This workshop is intended to draw from and discuss the “best practices” developed by a number of legal services programs, including policies, practices and strategies to assess client language needs and legal issues, staff employment (recruitment, training, evaluation and retention), collective bargaining agreements, changing standards or practice and potential errors and omissions, evaluation/testing of current practices and the manager’s role in overseeing these issues.

*Catherine Carr, Community Legal Services, Inc.; Luis Jaramillo, California Rural Legal Assistance; Joann Lee, Legal Aid Foundation of Los Angeles*

Noon — 2:00 P.M.

### Awards Luncheon

**Room:** Grand Ballroom CD

2:15 P.M. — 3:45 P.M.

### Board Committees: Good & Best Practices



**Room:** College

Are your board’s committees effective? Are they productive and fulfilling their purpose? Committees play an invaluable role in the effective and full functioning of a board or commission. This interactive roundtable session is designed to allow participants to share good and best practices on committee and board practices.

*Melanie Herman, Nonprofit Risk Management Center; Andrew Steinberg, Nonprofit Management Consultant*

### Defending Clients Against Mistaken Eyewitness Identifications



**Room:** Grand Ballroom B

This session will train lawyers on the psychological research surrounding eyewitness identifications, how to work with eyewitness experts and how to incorporate the psychological research into motions practice, case theories and jury instructions.

*Timothy O’Toole, Public Defender Service for the District of Columbia; Catharine Easterly, Public Defender Service for the District of Columbia*

### Women & Leadership: Challenge and Opportunities for the Equal Justice Community



**Room:** Caldwell

Women face unique challenges and opportunities in their professional careers. Balancing professional goals and responsibilities with other aspects of our lives becomes even more challenging as we take on leadership roles in our organizations. Please join us for a facilitated discussion of the challenges and opportunities women face as leader in the equal justice community

*Catherine Beane, NLADA; Lillian Moy, Legal Aid Society of Northeastern New York*

### HotDocs for Advocates: Serve More Clients and Serve Them Better Using Document Automation

**Room:** Graves (Hilton Hotel)

Much of the focus on document automation has been creating pro se forms. While this is a very worthwhile use of document assembly, document assembly was created to be used by lawyers to serve clients. This session focuses on creating systems for legal services staff to use. We will present evaluation from programs who have done this to show how much time was taken in preparing documents without document assembly, then the time savings that resulted after implementation. The savings is dramatic. In addition, we will explain how the use of these systems improves the quality of the work product, plus explain how they can take advantage of the free software and server available to all legal services programs through the National HotDocs Project.

*Glenn Rawdon, Legal Services Corporation; Cynthia Vaughn, Ohio Legal Assistance Foundation; Ed Marks, Legal Aid of Western Ohio; Kate Bladow, Pro Bono Net*



# Conference Agenda

## Friday

2:15 P.M. — 3:45 P.M. (Continued)

### Trafficking

**Room:** Harris

This workshop will address the phenomenon of human trafficking in the United States and legal avenues to protect and advance the rights of trafficked individuals. Many migrant workers, persuaded by assurances of well-paying jobs and good working conditions, are legally or illegally transported into the United States. Subsequent to arrival, however, the worker may be subjected to extreme forms of exploitation that amount to forced labor. There is legal relief available for these workers. Under the Trafficking Victims Protection Act, trafficked individuals may receive immigration status, and social service benefits. Moreover, trafficked persons are entitled to civilly sue their traffickers for monetary relief. This panel is intended to provide an overview of human trafficking and the legal rights and relief available to trafficked persons.

*Jennifer Lee, Colorado Legal Services; Kathleen Kim, Stanford Law School*

### Just the Facts: Using Data for Reform, Achieving Political Objectives, Increasing Funding and Moving Toward Holistic Representation



**Room:** Independence

Data is a powerful, but under-utilized, weapon that can be used to achieve political objectives and trigger reform. Learn how data can be used to establish political credibility, secure additional funding, achieve political reform, enhance the voice of indigent defense in the criminal justice system and the community, and improve the quality of defense services for clients. Learn how data is moving North Carolina toward a more client-centered approach to indigent defense.

*Margaret A. Gressens, North Carolina Office of Indigent Defense Services*

### Medicare Part D for Low-Income People

**Room:** Kings

This session will provide an overview of the new prescription drug benefit, particularly as it affects low-income people, immigrants, and LEP individuals. We will address how Part D differs from Medicaid beneficiaries' issues, auto enrollment, the low-income subsidy, enrollment/disenrollment, language access, exceptions and appeals and program glitches.

*Randy Boyle, National Health Law Program; Anna Rich, National Senior Citizens Law Center*

### State Funding Roundtable - Reports on 2006 Successes and Plans for 2007

**Room:** Park

This roundtable is designed for those civil legal services advocates who are involved in obtaining appropriations, court fees or fines, and similar funding from state legislatures. Come share your successes and issues from the 2006 legislative session, and share ideas and ask questions about 2007 and beyond.

*Meredith McBurney, ABA Resource Center for ATJ Initiatives*

### The Hottest (and Worst) Legislative Trends



**Room:** Providence I

Attendees will hear of recent trends in federal and state legislation adopted or defeated that impact upon indigent defense. The session will focus on loan forgiveness, public access to court records, record retention, juvenile jurisdiction, sex offenders, right to counsel and indigency determinations. Co-sponsored by the American Council of Chief Defenders' National Voice Committee.

*Dana Hlavac, Mohave County, Arizona Public Defender; Wesley Shackelford, Texas Task Force on Indigent Defense; Thomas Becker, Iowa State Public Defender; Richard Goemann, NLADA; Deborah Del Prete Sullivan, Connecticut Division of Public Defender Services; Michael DiLauro, Rhode Island Department of the Public Defender; Randi Hood, Montana Public Defender*

### Breaking Down Walls: How to Build Successful Collaborations Around Criminal Justice & Reentry



**Room:** Grand Ballroom A

Almost one third of adults in the U.S. have a criminal record. As a result they face significant barriers and disabilities, which are exacerbated by gaps in quality services. Case studies of successful collaborations will illustrate the role of community partnerships in bridging this gap, with emphasis on challenges and lessons learned.

*Kate Rubin, Reentry Net; Fran Fajana, Massachusetts Law Reform Institute, Inc.; Horace Small, Union of Minority Neighborhoods; Margaret Richardson, East Bay Community Law Center*

# Conference Agenda

## Friday

2:15 P.M. — 3:45 P.M. (Continued)

### On the Road to Quality: Where Do We Go From Here

**Room:** Providence II

This workshop will serve as the culmination of a series of panels focusing on discrete developments related to the civil quality agenda and program enhancement, including the ABA Standards for Providers of Civil Legal Aid, the LSC Performance Criteria, the ABA Principles of a State System for the Delivery of Civil Legal Aid and several sessions on the civil defined right to counsel issue. Panelist will review efforts currently underway to make these tools more accessible to provider programs and engage participants in an exchange regarding what next steps would most help them focus effectively on quality and program enhancement.

*Alex Gulotta, Legal Aid Justice Center; Sarah Singleton, Montgomery & Andrews, P.A.; Ellen Hemley, Legal Aid University; Karen Sarjeant, Legal Services Corporation; Lillian Johnson, (Arizona) Community Legal Services Inc.*

### Facing and Fixing the Legal Services Salary Problem

**Room:** Providence III

Chronically low legal services salaries weaken and distort our programs, but for too long we have viewed this problem as beyond our ability to solve. In this session, we will unearth the mistaken assumptions that cause this paralysis and discuss promising local and national approaches.

*Catherine Carr, (Philadelphia) Community Legal Services Inc.; John E. Tobin, Jr., New Hampshire Legal Assistance*

### Hot Topics in Risk Management for Legal Services Organizations: Preventing the Most Common Employment Practices and Malpractice Liability Claims

**Room:** Queens

We will be presenting an overview of employment law issues, emphasizing the sorts of claims commonly encountered by civil legal practitioners and providing practical tips for preventing them. Topics to be covered include handling exempt employees, dealing with impaired lawyers, and best practices in hiring, firing, and supervising employees and staff. Also on the agenda will be a discussion of how to avoid the most common legal malpractice claims encountered in civil practice, including the effective use of docketing/calendaring systems. This session is sponsored by the NLADA Insurance Program.

*Art Lachman, Attorney-at-Law; Judith Colbert, Law Offices of Judith Colbert; Toby Rothschild, Legal Aid Foundation of Los Angeles; Neil McBride, Legal Aid Society of Middle Tennessee & the Cumberland*

### Public Defense on the International Stage: Embracing a Global Defender Perspective at Home and Abroad

**Room:** Sharon

Policy makers from around the world meet with defenders to learn how to design indigent defense programs in their home countries. International cultural issues appear regularly in most courtrooms in America. Human rights issues are presented on behalf of clients in local jurisdictions. Defenders participate in international conferences to both share and learn how to represent and serve our clients. Come hear about resources, information and personal reports that will aid defenders in exploring opportunities to grow and better fulfill their mission at home and around the world.

*Bob Ward, Public Defender's Office, 26th Judicial District of North Carolina; Bennett Brummer, Miami-Dade Public Defender's Office; Michael Judge, Los Angeles County Public Defense Office; Grady Jessup, Law Offices of Grady Jessup; Lauren Chen, Public Defender's Office, 26th Judicial District of North Carolina*

### Immigration Issues at the State and Local Level

**Room:** Tryon North

This session will discuss state and local integration of new immigrants, especially in the areas of law enforcement, education, employment, health care, housing, access to financial services, welfare benefits, voting, and access to justice. This panel will discuss responses to state laws and ordinances designed to force immigrants out of communities by targeting employers, landlords, social services, and contractors that have dealings with non-citizens, as well as local policies intended to promote inclusion for immigrants.

*Milo Mumgaard, Nebraska Appleseed*



# Conference Agenda

## Friday

2:15 P.M. — 3:45 P.M. (Continued)

### Breaking Down Barriers to Comprehensive Early Care and Education for Young Children in Immigrant Families Through Collaboration and Advocacy C

**Room:** Tryon South

For children of immigrants, high quality early care and education has the potential to address school readiness and language acquisition, provide access to comprehensive services and promote parental involvement. Barriers, including language, immigration status and lack of culturally competent programs will be discussed along with the federal and state laws and policies that promote or discourage access.

*Deeana Jang, Center for Law and Social Policy; Eve R. Herschopf, Child Care Law Center; Tanya Broder, National Immigration Law Center*

3:00 P.M.— 5:30 P.M.

### The Trials of Darryl Hunt

**Room:** Ballroom CD

4:00 P.M. — 5:30 P.M.

### Board Accountability: Sarbanes-Oxley and Equal Justice Boards B

**Room:** College

Boards are accountable to the community, funders and the government. Congress passed Sarbanes-Oxley in response to scandals in public companies. These reforms call require a greater degree of transparency and accountability for companies. Nonprofit boards have not been without scandal and questionable practices. Learn how you and your organization can take steps to improve its effectiveness in this post Sarbanes-Oxley world of greater accountability.

*Melanie Herman, Nonprofit Risk Management Center; Andrew Steinberg, Nonprofit Management Consultant*

### Judicial Leadership for Expanding Access to Justice

**Room:** Grand Ballroom A

This moderated roundtable discussion will consider the engagement of the judiciary in expanding access to civil justice. What can the courts do to support legal aid? How can legal aid assist the courts in expanding access to justice for low-income people? Are there ethical limitations

affecting the courts' involvement in this area? How can legal aid programs build relationships with the courts?

*Deborah Hankinson, ABA Standing Committee on Legal Aid and Indigent Defendants; Hon. Karla Gray, Montana Supreme Court; Hon. Lora Livingston, District Court Judge of Travis County Texas*

### Performance Standards for Criminal Defense Investigations D

**Room:** Grand Ballroom B

We will consider performance problems that are commonly experienced when attorneys work with investigators. We will review Kentucky's new performance standards for investigations. Some of the matters addressed by those standards include: ethical rules, the roles of attorney and investigator, practicing law without a license, interactions with witnesses, crime scenes and physical evidence, record-keeping, and dealings with clients. We will cover the performance obligations of not just investigators themselves but also attorneys who work with them.

*Margaret F. Case, Kentucky Department of Public Advocacy; Jay Barrett, Kentucky Department of Public Advocacy*

### 50 Technology Tools and Tips

**Room:** Graves (Hilton Hotel)

A quick-paced session for equal justice advocates who want an edge. This session will cover up to 50 quick, easy technology tips from advanced Word functions to free Internet-based tools to help equal justice advocates work better with technology.

*Alison Paul, Montana Legal Services Association; Kate Bladow, Pro Bono Net*

### Issues Affecting Access to Health Care and Public Benefits for Low-Income Immigrants C

**Room:** Harris

Eligibility restrictions imposed by the 1996 welfare law prevent immigrants from securing the services they need. Confusion about these rules and other immigration concerns prevent eligible immigrant families from seeking services. The federal immigration debate, state anti-immigrant proposals and a Medicaid provision that addresses only citizens has added to the hostility and confusion. Meanwhile, some states and localities have taken steps to promote access to services for immigrants. Participants will review basic rules governing immigrant eligibility, explore barriers and discuss strategies for improving access to services. They will also learn more about resources available to help in these efforts.

*Tanya Broder, National Immigration Law Center; Sonal Ambegaokar, National Immigration Law Center*

# Conference Agenda

## Friday

4:00 P.M. — 5:30 P.M. (Continued)

### How to Improve Criminal Cases Processing and Benefit Your Clients - Results of a Study on Direct Electronic Filing in Criminal Cases D

**Room:** Independence

The session will discuss results of a major study on the impact of direct electronic filing in criminal cases. Results include data on a variety of case outcomes and an overview of a model program of both technology and work practices that can be implemented in jurisdictions across the country

*James D. Bethke, Texas Task Force on Indigent Defense; Dr. Dottie Carmichael, Public Policy Research Institute at Texas A&M University*

### IBB (Interest-Based Bargaining) Negotiation: Freeing Your Staff to Concentrate on the Community

**Room:** Kings

We negotiated our labor contract in two days using IBB bargaining techniques. This technique can also be used to resolve community issues. IBB eliminates "us vs. them", allowing creative solutions to take root. Instead of looking for "perfect" solutions we discuss "acceptable" solutions. Use these methods for positive results.

*Gail Patrick, The Legal Aid Society of Columbus; Bernard Dempsey, Legal Aid Society of Columbus; George Albu, Federal Mediation Services*

### Defining, Encouraging and Measuring Quality D

**Room:** Park

The main theme will be that although legal services are not "widgets", we can and should be specific as possible in defining the attributes of quality services. This theme applies to attorneys, some of whom resist the notion that their work can be fairly evaluated ("everyone is unique"). However, it also applies to support staff, many of whom appreciate knowing (for example) that the organization values accurate data entry, timely completion of investigative reports, and successful referral of clients to treatment and diversion programs. This session will also focus on the relationship between quality standards and workload demands.

*Michael Tobin, Wisconsin State Public Defender; Leonard Noisette, Neighborhood Defender Service of Harlem*

### Looking Through the Four Frames: An Essential Leadership Tool for Developing Conscious, Intentional and Wise Strategies J

**Room:** Providence I

Challenges that face leaders and managers in defender and civil legal services organizations can be complex and daunting. "Reframing" is a process for critical thinking. By consciously looking at problems through the "structural, human resource, political, and symbolic" frames, leaders make wise decisions, and develop comprehensive and effective solutions using the right people, resources and tactics for the job.

*Jeff Sherr, Kentucky Department of Public Advocacy; Cathleen Bennett, Massachusetts Committee for Public Counsel Services; Ernie Lewis, Kentucky Department of Public Advocacy*

### The MIE Roundtable for Legal Services Executive Directors and Managers

**Room:** Providence II

This forum provides legal services executive directors and managers with an opportunity to share management concerns and receive peer support and assistance in an informal and confidential setting.

*The roundtable will be facilitated by members of the Management Information Exchange Board of Directors.*

### The Intersection of Employment Practices Liability, Legal Malpractice Liability and Professional Discipline: Identifying and Preventing the Highest Risk Situations in Defender Organizations D

**Room:** Queens

Managers of defender organizations face increasing liability and disciplinary exposure relating to their duties in hiring, firing and supervising personnel. With the expert perspective of seasoned practitioners, we will discuss how claims arise from managing employees and staff and offer practical tips for preventing those claims. We will also explore other cutting-edge liability and ethics issues, including the new ABA ethics opinion on workload issues, recent Supreme Court case law regarding First Amendment rights of public employees, dealing with impaired professionals and determining when to get help in resolving ethics and liability issues. This session is sponsored by the NLADA Insurance Program.

*Art Lachman, Attorney-at-Law; Judith Colbert, Law Offices of Judith Colbert; Jim Neuhard, State of Michigan Appellate Defender Office; Vince Aprile, Lynch, Cox, Gilman and Mahar*



# Conference Agenda

## Friday

4:00 P.M. — 5:30 P.M. (Continued)

### The North Carolina Experience: Reforming Indigent Defense in a Conservative State



**Room:** Sharon

Since 2001, N.C. Indigent Defense Services has been responsible for overseeing representation of indigent persons, improving the quality of representation, ensuring the independence of counsel, establishing policies and generating data to evaluate services and expenditures. This session will address N.C.'s experience with developing a centralized oversight organization and the challenges facing IDS.

*Malcolm Ray Hunter Jr., NC Office of Indigent Defense Services; Danielle Marie Carman, NC Office of Indigent Defense Services*

### Race, Language Access, Immigration and Poverty Post Katrina



**Room:** Tryon South

This workshop will examine how race and racism manifest themselves in the everyday practice of poverty law. Using the insights gained from a post-Katrina analysis, panelists will explore the intersection of race, language access, immigration and poverty and how that intersection impedes justice, hope and opportunity in our communities. Are issues of racial justice more acute than ever? Is Katrina relevant to those of us practicing poverty law far from the Gulf Coast? How does understanding of the denial of rights and services based on race, status or language in America affect the every day delivery of legal services? Panelists will include those who are using racial and/or language access frameworks to develop new ways to fight poverty and racial injustice.

*Juliet Choi, American Red Cross; Damon Hewitt, NAACP Legal Defense & Educational Fund, Inc.; Divine Pryor; Susan Bryant, City University of New York School of Law*

### Creating An Environmental Health Project for Your Legal Aid Program

**Room:** Tryon North

Across the country legal aid programs are developing creative ways to address legal needs related to protecting environmental health of low-income individuals and communities. These legal needs include advocacy to protect tenants from unsafe housing conditions that cause lead poisoning and asthma, prevent siting of environmentally hazardous land uses in low-income communities and promote environmental justice through elimination of health disparities affecting low-income and non-white communities.

Panelists will discuss their work on these issues and ideas for creating and funding new initiatives in legal aid programs.

### Integrated Representation: Putting the Client First Through Teamwork Across Disciplines



**Room:** Providence III

What does it take to provide team-based, client-centered representation across disciplines? This team of two attorneys, a social worker and a psychologist will discuss what they learned about building trust, coordinating information and communications and developing a core team to support their client. The presenters will share the essentials of effective teamwork learned in the death penalty representation context. Participants from all disciplines will learn what it really takes to work beyond difference to put the client first.

*Janice Stevenson, Columbia Mental Health Resources, Inc.; Lori James Monroe, L.Y. James & Associates; Katy O'Donnell, Office of the Public Defender; Mike Morrisette, District Public Defender, (Frederick and Washington Counties, Maryland)*

5:45 P.M. — 6:45 P.M.

### Language Access Advocates Affinity Group

**Room:** Tryon South

## Saturday

7:30 A.M. — 8:15 A.M.

### Women of Color Working Group

**Room:** Morehead

8:00 A.M. — 10:30 A.M.

### American Council of Chief Defenders Winter Meeting

**Room:** Providence II

8:30 A.M. — 10:00 A.M.

### Federal Funding Roundtable

**Room:** Independence

All conference attendees who are involved in raising non-Legal Services Corporation federal funds for civil legal services are invited to attend this discussion. Participants will have the opportunity to share successes, raise issues of mutual concern and learn from others about both traditional and new sources.

*Meredith McBurney, ABA Resource Center for ATJ Initiatives*

# Conference Agenda

## Saturday

8:30 A.M. – 10:00 A.M. (Continued)

### Language Access: Introduction to Working with Interpreters

Room: Kings

In order to provide effective, non-discriminatory services to changing client communities, lawyers must be able to interview limited English proficient clients through interpreters. This interactive workshop will teach advocates the basics of how to utilize interpreters and show how this helps to preserve the voice of the client.

Paul Uyehara, Community Legal Services Inc.; Claudia Colindres Johnson, Bay Area Legal Aid



### Hot Topics in Legal Aid

Room: Providence III

This session will focus on a wide array of funding and policy issues relevant to civil legal aid programs. NLADA staff will cover such areas as the impact of the 2006 elections, developments of interest related to the Legal Services Corporation, funding outlook for FY 2006 and beyond, Violence Against Women Act and other non-LSC federal funding opportunities, civil right to counsel efforts and other litigation developments, leadership initiatives, the ABA Standards and other issues of interest to civil legal aid providers. Participants will be able to question the panel regarding matters of concern to them as well.

Don Saunders, NLADA; Julie Clark, NLADA; Kate Lang, NLADA; Linda Perle, CLASP; Charles Wynder, NLADA

### What You Don't Know Can Hurt You: Collateral Consequences of Criminal Charges

Room: Queens

In the past 25 years, American society has sought to cure societal problems by increasing the number of criminal laws and criminal sentences, the theory being that this will act as a deterrent to crime. Unfortunately, this has not worked as anticipated. A class of people has been created who are unemployable, homeless or at increased risk for homelessness and closed out of societal responsibilities. Join us for a dynamic discussion of expungement and other collateral consequence remedies.

Linda Kennedy, Homeless Persons Representation Project, Inc.

10:00 A.M. – 5:00 P.M.

### Standing Committee on Legal Aid and Indigent Defendants (SCLAID) Business Meeting

Room: Brevard

10:30 A.M.

### Closing Plenary Brunch

Room: Grand Ballroom CD

1:00 P.M.

### AAPDA - Minority Project Directors Meeting

Room: Kings

## 2007 NLADA Training Calendar

Appellate Defender  
Training

Chicago, IL  
January 17-21

Life in the Balance

Dallas, TX  
March 10-13

Equal Justice Conference

Denver, CO  
March 22-24

NDLI Defender

Impact Leadership  
May 2007

Civil Impact Leadership

San Jose, CA  
July 16-18

Substantive  
Law Conference

San Jose, CA  
July 18-21

Annual Conference  
2007

Tucson, AZ  
November 8-12

Visit [www.nlada.org/training](http://www.nlada.org/training) for more information!