

Building a High Performing Advocacy Team

EJC 2009 Outline

Building a high performing advocacy team in a legal hotline environment presents unique challenges, as the mission, tasks and stresses of hotline work differ from those in the field. This workshop will examine the elements of a high performance team and address key issues such as hiring practices, performance standards and expectations, traditional and non-hierarchical models of case review, staff evaluation, and general support of the team for the ultimate benefit of clients.

- I. Hiring Practices: Be careful going in!!
 - a. Know what you want.
 - i. Attorneys? Paralegals? Students? Full time? Part time? Paid? Volunteer?
 - ii. Personality and life experience vs substantive knowledge
 - iii. Pros and cons of experienced vs inexperienced attorneys/advocates
 - iv. Passion for poverty work vs basic capacity for empathy
 - v. Bionic Hotline Attorneys, ala CALL (PP Slides #1-3)
 - b. Advertise electronically and analyze the proficiency and professionalism of electronic responses.
 - c. Assess candidates in a holistic fashion
 - i. Cover, Resume and Writing Sample
 - ii. Email exchanges
 - iii. Pre-interview telephone assessments
 - iv. In-person interview
 1. Grasp of questions and succinctness of replies
 2. The walk and the talk
 - a. Life (Community volunteering, Peace Core, VITA, travel)
 - b. School (Community volunteering, Clinics)
 - c. Career (Community volunteering, Pro bono involvement)
 3. Mutual matching (are you as good for the candidate as the candidate is for you?)
 4. Follow up
 - v. Around the interview: The assessment of speed
 - d. If at first you don't succeed, try, try again! It is better to work shorthanded than to be hampered by poor advocates. The ideal candidate is out there, somewhere.
- II. Performance Standards and Expectations
 - a. Set Explicit Standards and ***Tell Your Team What They Are!***
 - b. CALL's Team Expectations (PP Slides #4-10) (adopted and adapted from NJC's Team Expectations ☺)
- III. Models of Case Review
 - a. Pick a Purpose: Technical accuracy and/or substantive advice and assistance?
 - b. Supervisor vs Peer Review
 - c. Total vs Targeted Review (Newbie Review, Trouble Review, Spotted Review and other variations)
- IV. Staff Evaluation
 - a. Probationary review (60-90 days post hire)
 - b. Continuous feedback
 - i. Case review
 - ii. Intensive work with underperforming staff
 - c. The pros and cons of Annual Reviews
- V. General Support of the Team
 - a. Training: Training increases efficiency, self-sufficiency, professionalism and pride. It also improves client outcomes, limits mistakes, and pares down time spent on case review and remediation.
 - i. Training Components:
 1. Program purposes and policies (who we are, why we do what we do, and how we do it)
 2. Substantive Law
 3. Customer Service
 4. Technical How To's:
 - a. Building a Better Application and IFAR examples
 - b. CMS Step-by-Steps
 - c. Voice mail, etc
 - ii. Training Timeline:
 1. Initial: 5-15 day orientation/training process, including one-on-one instruction, mentoring and required reading.

2. Daily: Teaching via case review; email/wiki/CMS alerts on emerging substantive law; etc
 3. Monthly: 3rd Friday meetings and trainings; 1st Friday webinars
 4. Quarterly: Substantive task forces
 5. Annual: Road Show and other extended, substantive offerings
- iii. Training Reminders: Keep track of your trainings and show them off at year's end. It gives a serious boost to staff and management, alike! (PP Slide #11)
- b. Materials:
- i. Build a Wiki! (PP Slides 12+) CALL's wiki includes:
 1. Sub Law Manual
 2. Resource Links
 3. Pleading+ Bank
 4. Issue Watches
 5. The Map
 6. Program Pages and Frequent Referrals (including up-to-the-moment referral criteria)
 7. Funder pages
 8. The Staff Lounge (including staff bios, anatomy of a bionic hotline attorney, team expectations, capacity assessment assistance and much more)
 - ii. Use automatically generated form letters and pleadings (A2J, CMS, etc)
- c. Support: Support comes in many, many forms. Consider:
- i. Professional development
 - ii. Physical arrangements to promote interactivity, mentoring and mutual support
 - iii. Case review
 - iv. Regular opportunities for food, fun and professional development (3rd Fridays, etc)
 - v. Good Stories
 - vi. Silly celebrations (Harvey Nagillah, White Elephant Parties, etc)
 - vii. Chocolate!