



MANAGEMENT INNOVATION EXCELLENCE FOR LEGAL AID

MANAGEMENT INFORMATION EXCHANGE
99 CHAUNCY ST., SUITE 700
BOSTON, MA 02111-1743



MIE NATIONAL CONFERENCES FOR
LEGAL AID DIRECTORS AND ADMINISTRATORS
NAVIGATING THE CROSSWINDS
AUGUST 17-19, 2011

MIE NATIONAL CONFERENCES
FOR LEGAL AID DIRECTORS & ADMINISTRATORS

NAVIGATING THE CROSSWINDS

August 17-19, 2011

The National Conference for Legal Services Administrators will take place on August 17 and 18.

The National Directors Conference will take place on August 18 and 19.

Joint programming for Directors and Administrators will occur on August 18.

You are welcome to attend all three days at a special rate.

Each Day includes an in-depth plenary session:

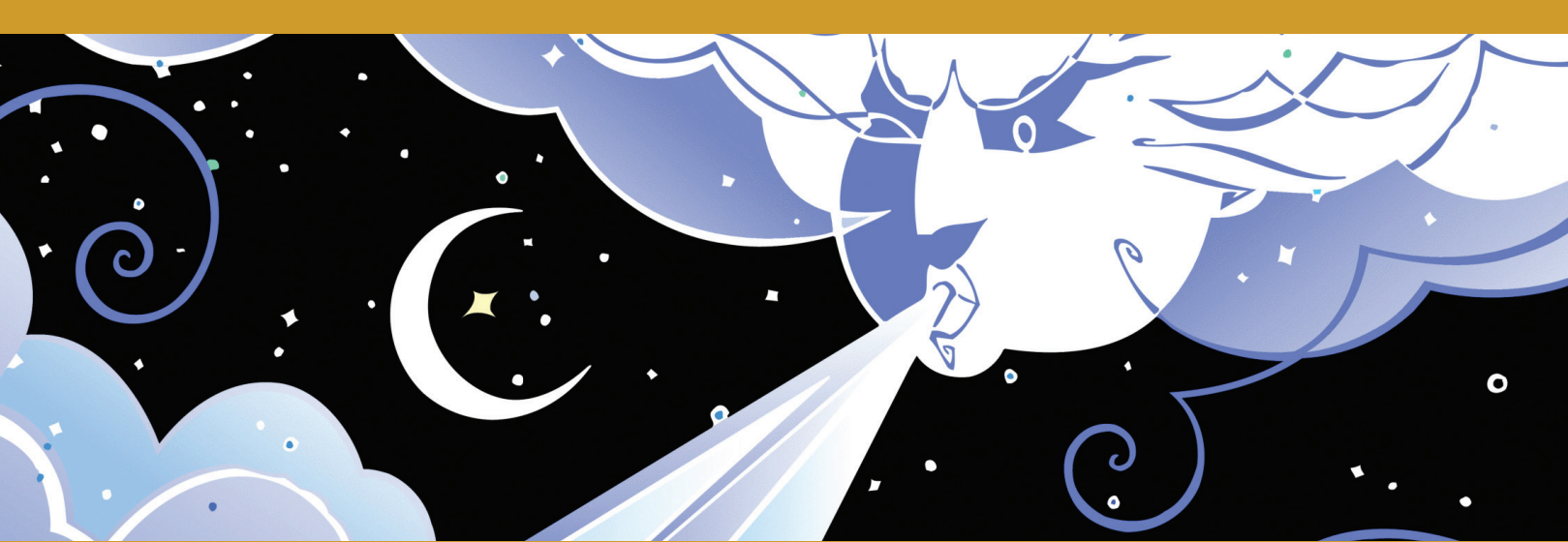
August 17th — Financial Leadership with GERRY SINGSEN

August 18th — Performance Management with BEVERLY WEISE

August 19th — Quality Advocacy with JOHN TULL

...as well as a choice of valuable workshops.

REGISTER BY JULY 29, 2011



MIE NATIONAL CONFERENCES
FOR LEGAL AID DIRECTORS & ADMINISTRATORS

NAVIGATING THE CROSSWINDS JOIN US IN THE WINDY CITY

AUGUST 17-19, 2011

Crowne Plaza Avenue Chicago Downtown Hotel

AUGUST 17, 2011 PLENARY

Financial Leadership in Hard Times — When Management Isn't Enough

When revenue dries up, legal services programs need financial leadership to get through the hard times. Today, states are pinching pennies, LSC has been cut and IOLTA is a shadow of its former self. Building on a base of sound financial management, how should you lead your program for the next several years? With *Gerry Singesen* facilitating, panelists will share leadership experiences and reflect on the roles of executive directors, administrators, financial officers and board members.



Gerry Singesen is a consultant and trainer to legal services program staffs, management and boards of directors, and the Massachusetts Access to Justice Commission. He has written extensively on legal services goals, management, practice and regulation. He has been a project director, deputy director and middle manager in legal services programs, was Vice President of LSC between 1979 and 1982, was a lecturer at Harvard Law School from 1984 to 1994, directed the Interuniversity Consortium on Poverty Law and helped many programs, regions and states plan their responses to LSC's state planning initiative between 1998 and 2004. Together with Judy Arrigo he has presented a program on Financial Management in Legal Services to more than a thousand managers over the last quarter century.

WORKSHOPS

Financial Management Practices for Tight Times

What are best practices for projecting revenue futures, contingency planning, monitoring cash flow, considering furloughs and layoffs, determining the "right size" for a shrinking program, and anticipating labor issues and diversity impacts? Working with experienced participants, *Gerry Singesen* leads an exploration of these critical topics.

Health Insurance Developments, Challenges and Changes

Explore what lies ahead in national Healthcare Reform and what innovative and necessary changes legal services programs have made to their benefit plans in these times of uncertainty. *Daniel A. Byrne, CEBS, CWCA, Executive Vice President/Principal, Byrne, Byrne and Company.*

Realistic Technology Security Policies for Legal Aid Offices

With the increasing use of technology, legal aid programs need to be more "security aware" and understand the risks that exist in our environment. This session will help you develop a consistent set of plans, policies, and procedures that enable educated responses based on facts rather than paranoia.

Building a Productive Union Relationship

Join us for a discussion of issues that arise in working with legal services unions and learn effective methods for handling those negotiations. *Jeff Gilbert* is a partner at Johnson, Jones, Snelling, Gilbert & Davis, P.C. in Chicago. From 1979 until 1994, he worked for the Legal Assistance Foundation of Chicago, supervising employment litigation. He graduated Harvard Law School ('76) and Northwestern University ('73). He is also a (poorly paid) drummer in a rock & roll band.

Going Paperless

"Now where is that file?" "Has my leave request been approved yet?" "Aug, my desk is a mess!" Sound familiar? Go paperless and avoid it all! You can make documents easier to find, more secure, and cut costs by going to a paperless office. This session will show you how.

Fiscal Roundtable — Holistic Grant Management

Attend this roundtable to discuss the challenges of accounting for grants while managing results for clients. *Gerry Singen*, facilitating.

Employment Law Surrounding Layoffs and Retrenchment

An overview of employment law considerations when programs contemplate staff reductions, including planning, potential discrimination claims, seniority and the effect on diversity, by *Jeff Gilbert*.

Training and Technology

While there is a time and place (Chicago, for one) for seeing colleagues face to face, some topics and trainings lend themselves to the use of technology. Explore different technology training delivery models and learn to save time and money while addressing training needs.

Timekeeping, Case Management and Payroll as They Flow into Accounting

Does your Accounting System speak Case Management? Does your Payroll System speak Timekeeping? In this session learn about the cutting edge of integrating your major systems for greater efficiency.

AUGUST 18, 2011 PLENARY

A Performance Management System: It's So Much More Than Just Performance Appraisals

A systematic approach to performance management is a critical element in achieving performance results, rewarding excellence, and developing employees. Many organizations focus on just one element, the performance appraisal. This approach is often too subjective, demotivating to the employee, and doesn't result in changed behavior or higher performance. An effective system links individual efforts to the organization's mission and objectives. It sets specific, measurable performance goals so expectations are clear and individuals know how to be successful on the job. Through regular check-in discussions, coaching and feedback, and setting individual development goals and plans, an organization can demonstrate its values for employee growth and development. A comprehensive performance management process will effectively motivate individuals and will help achieve the best possible results for legal aid clients.



Beverly Weise, MBA, Founder and President of Leadership Talent Solutions, is a Performance Management and Talent Management Consultant and Executive Coach with over 25 years of experience in legal, nonprofits, aerospace, manufacturing, healthcare and entertainment. She helps organizations create Performance Management systems that result in a highly motivated and engaged workforce,

with strong performance and results. As Northrop Grumman's Corporate Director of Executive Planning and Development, she initiated the first companywide Succession Management Process designed to identify and develop emerging leaders. For 8 years, Bev was Executive Director of Interlaw Ltd., an international association of independent law firms in 120 cities worldwide. She holds an MBA from UCLA Anderson School of Management with a specialty in Organizational Management and is a certified Executive Coach.

WORKSHOPS

The Art of Giving Performance Reviews

Performance Reviews, if done right, can result in an average employee achieving higher levels of performance, poor performers "stepping up their game," and a top performer, engaged, motivated and *retained*. If done poorly, performance reviews can be a source of poor morale and unmotivated, disengaged employees. *Beverly Weise* will teach the key skills needed to give a successful review: Coaching, Feedback, Active Listening, and Questioning.

Admin and ED Teams — How We Work Together

What are the key characteristics of an effective Director/Administrator team? If you aren't operating as you should, what's missing? Hear from colleagues as they discuss the results of a survey on these specifics, and pick up tips and tools to help your team improve.

Morale: Leadership in Times of Stress and Challenge

We have been through times of financial challenge and stress before, but this is an unprecedented and extended economic downturn. How do we take care of our staff and ourselves? Whether you have been through revenue cuts several times or never before, join this conversation to talk through how it feels and to share tools to benefit yourself and your staff.

Financial Oversight and Internal Controls

This workshop for executive directors and fiscal officers will focus on the critical importance of effective financial oversight and internal controls in LSC-funded programs. The session will highlight key changes in the 2010 Accounting Guide for LSC Recipients, identify internal control best practices and offer resources and tools for evaluating control systems, improving fiscal processes and reducing risks.

Computing in the Clouds

Not sure what it is? Think of that room full of expensive servers disappearing! Outsourcing your technology to the cloud offers potential cost savings but also comes with potential risks. This session will explain what it is, when it can be beneficial, and how to keep your information safe.

Hot Topics in Legal Aid

...with *Don Saunders*, Director of Civil Legal Services, National Legal Aid and Defender Association.

AUGUST 19, 2011 PLENARY

Maintaining Quality Advocacy in Times of Declining Revenue

In times of declining revenues for legal aid and loss of funding for programs on which our clients rely, it is particularly important that we focus our limited resources on accomplishing the most important results possible for the communities we serve. We

cannot afford to spend time and resources on work that does not respond to the most important issues clients face. This session will focus on how leaders in legal aid programs can lead and manage their programs through turbulent times to maintain high-quality, strategically focused advocacy. It will take a broad look at the challenge of making the right choices regarding a program's focus and optimal design given potentially drastic changes in funding and in client needs, all in the context of the constraints that affect available options.



John Tull's career in legal services spans more than 40 years, starting as a Reginald Heber Smith Fellow and staff attorney at Southern Arizona Legal Aid where he served as Executive Director from 1974 to 1980. He served as Vice-President for Programs and Director of Program Operations at the Legal Services Corporation from 1994 to 1998. More than 20 years of John's career has been spent as a management consultant to organizations involved in the delivery of legal aid to low-income communities. The author of numerous articles and studies about the delivery of legal services to low income people, John also was the reporter for the *ABA Standards for the Provision of Civil Legal Aid* (2006), the *ABA Standards for Providers of Civil Legal Services to the Poor* (1986) and the *ABA Standards for the Monitoring and Evaluation of Providers of Legal Services to the Poor* (1991).

Strategic Planning around Retrenchment

Discussion during this workshop, facilitated by *John Tull*, will help participants consider their particular situation and develop a realistic plan and strategy for the immediate and long-term future.

Leadership Development and Diversity

Discuss promising practices in building leaders of all staff members and hiring and retaining diverse staff in our programs.

Top Ten Things Every ED Should Understand about Technology

Technology has dramatically changed the way that legal aid organizations deliver services. This session will guide executive directors and administrators in keeping their program on the right track. *Ronald Staudt*, professor of law at Chicago-Kent College of Law, teaches Copyright Law, Intellectual Property Strategies, Internet Law, Public Interest Law & Policy, Justice and Technology Practicum, and Access to Justice and Technology, and directs the Center for Access to Justice & Technology, a law school center using Internet resources to improve access to justice by building Web tools to support legal services advocates, pro bono volunteers and pro se litigants.

The Executive Director: The Key to Successful Fundraising

Most legal aid executive directors understand their job description must include fundraising. The reality is that the commitment of executive directors to fundraising makes THE difference. This presentation will highlight executive directors whose fundraising skills have increased funding for their programs and provide an opportunity for you to share ideas about how to better lead resource development in yours.

Meredith McBurney, a consultant since 1997, specializes in

resource development for legal services and other advocacy organizations. She serves as a consultant to MIE, working on the design and implementation of MIE's resource development activities and consulting with individual legal aid programs. She also serves as a consultant to the American Bar Association's Resource Center for Access to Justice Initiatives. From 1981 to 1997, she was the Executive Director of the Colorado Lawyer Trust Account Foundation and the Legal Aid Foundation of Colorado.

Getting Really Serious about Raising Private Funds: Finding and Developing Strong Fundraising Board Members and Volunteers

To really increase resource development from private sources, we need to more effectively involve board members and other key volunteers in our fundraising efforts. We also must HAVE board members who possess fundraising skills and contacts, and are willing to use them to cultivate potential donors and ask them to give. Learn how to get the most out of your current volunteers and target additional recruits. *Meredith McBurney*, facilitating.

AND, MORE...

The NLADA Insurance Program Invites You to Lunch on August 18



To best meet members professional liability needs, the NLADA Insurance Program has developed a website through which NLADA insureds may manage accounts and renew policies 24 hours a day. Our valued program customers can create policies to suit the mission, culture and needs of each organization while taking full advantage of online training and informational materials. Also the website has an online risk management tool with customizable management policy guidelines and forms that allow clients to meet program needs and local professional liability requirements. The website and online risk management tool help our customers keep premiums low, prevent claims and improve coverage. See this capability demonstrated over lunch hosted by the NLADA Insurance Program.

REGISTRATION

REGISTRATION FEES: Registration for each conference is \$415 for MIE subscribers, \$515 for non-subscribers.
■ **Attend both conferences** — all three days — for only \$495 for MIE subscribers, \$595 for non-subscribers.
■ **Come with your team** — \$50 off for second and subsequent registrants.

HOTEL: Crowne Plaza Avenue Chicago Downtown, 160 East Huron, Chicago, IL 60611, 312-787-2900, room rates \$149/night plus tax. Reserve by July 29, 2011.

Visit www.m-i-e.org/Calendar to **REGISTER ONLINE** and pay by credit card, **OR SEND** registration information and check to MIE, 99 Chauncy St., Suite 700, Boston, MA 02111-1703.

FOR MORE INFORMATION, contact Patricia Pap, MIE Executive Director, 617-556-0288, ppap@m-i-e.org, and visit the MIE website at www.m-i-e.org.