Management Information Exchange Training

Management Information Exchange (MIE) has a mission is to spark excellence in leadership, management and fundraising in legal assistance programs serving low income clients, through training, consulting and publishing activities of the highest quality. MIE has built an outstanding reputation for our timely and practical training opportunities. MIE offers regularly scheduled trainings for executive directors, senior and mid-level program managers, supervisors of legal work, fundraisers and administrators. In addition MIE offers training development services to legal assistance programs, including assistance in planning and delivering training, at the local, state, regional, and the national levels.

Catalog of Trainings

This catalog identifies the trainings that MIE has developed and offered in recent years to legal assistance programs. These trainings may be modified and conducted for your program or a group of programs, at the local, state, regional or national level.

Supervising Legal Work

I. **Who should attend training?** This training is intended for persons who are the immediate supervisors of legal advocates and who are responsible for the supervising of those advocates' legal work. Depending on a program's size and configuration, this may include managing attorneys, senior staff attorneys, litigation directors, and project directors.

II. **What is taught at this training?**

1. The importance of establishing expectations for performance throughout the legal supervision process; some techniques for doing so.
2. The importance of maintaining systems for monitoring an advocate's progress on both legal work and professional development; alternative models for tracking.
3. Specific skills related to critiquing staff performance
    a) Critiquing an advocate's legal and non-legal job performance skills using Exploratory Feedback Techniques and NITA-style critiquing methods.
    b) Learning to structure and focus points made on critique.
    c) Learning how to pick, choose, and adapt various techniques.
4. How to develop and implement individual staff work plans related to work

productivity, professional development, and performance reviews.

5. Strategies for effectively implementing new systems.
6. Strategies for planning, delegating and overseeing projects.
7. An overview to adult learning styles and/or other personality and cultural factors, and their applicability to supervision decisions.

III. What methodology is used?

1. Lectures, small group discussions, small group exercises.
2. Individual exercises in small groups where participants practice offering exploratory feedback and performance critique on legal and non-legal work.
3. Exercises where participants develop sample individualized plans for both individual staff and for themselves.
4. Large group lectures with individual and small group exercises built in.

IV. Number of Days: 3 days

New Executive Director Training

I. Who Should Attend this Training? This two day training is designed for new directors and experienced senior managers of legal assistance programs, such as LSC-funded, IOLTA-funded, Title IIIb and pro bono programs, as well as for experienced directors and experienced senior managers of new legal assistance programs. The intent of the training is help new directors, who typically learn on-the-job, to more quickly achieve deeper insight into their work.

II. What is Taught at this Training? The training stresses both 1) knowing what should be done to lead an effective program, and 2) actually doing what needs to be done. Knowing is accomplished through an extensive set of materials, with tapes to guide self-study. Most of the training itself is devoted to doing – performing some of the most important tasks required of executive directors. Participants will also work on actual situations brought to the training by their colleagues.

Topics to be covered include: What is an effective legal assistance program? What is leadership, and how does it differ from management and administration? What strategies can be used to deliver services? How do you determine impact? Leading change: Why transformation efforts fail. What makes a program a "good place to work"? Working effectively with a board of directors.

III. What Methodology is Used? Prior to the training, participants review the training notebook materials with the help of an audio tape to guide self-study. During the two days, brief lecturettes are interspersed with standup exercises and small group discussion relating to the material presented. Confidential roundtable discussions allow participants the opportunity to work on challenges from their programs.

IV. **Number of Days:** 2 days

Managers in the Middle

I. **Who Should Attend this Training?** All legal services program staff who oversee branch offices, or programs or systems that involve management responsibility and supervision of staff or volunteers.

II. **What is Taught at this Training?**

Core Session #1 - Managing from the Middle- Topics will include:

Finding the right balance - Combining role and basic tasks in one's unit, office, community, and substantive law practice; managing legal work for effectiveness and quality; setting priorities and managing time; balancing program managerial and administrative demands with unit demands.

Developing leadership skills - "leader" vs "manager" dichotomy and developing leadership skills when you are not the leader of the pack.

Working effectively with your director and staff without losing yourself in the process - confidential discussions, personal tips and tales; managing both sides - those you supervise and your supervisor.

The Essential Manager - handling conflicts and differences, coaching, managing different temperaments; advisors and confidants in the office - can you? should you?; spotting problems; when to intervene; when to document and how to document without destroying trust; moving an agenda ahead while involving staff; the business of find the right process for a given situation; being able to determine what kind of problem or issue exists (diagnosis); find the correct process to deal with the problem or issue; visualizing what the situation will look like when the problem goes away or the issue is deal with.

Core Session #2 - Managing for Results - This session explores the overlapping roles fulfilled by legal services managers as leaders and managers. This session will address and allow you to experiment with a number of inter-related skills that managers need to have in their tool box to produce effective results for staff and for clients.

Core Session #3 - Preventing Employment Problems in the Workplace - A number of legal issues provide the underpinning for the work of a middle manager. This session will explore a preventative and problem-solving approach to key issues where the duty of the middle manager is significant. These issues will include: the hiring process; sexual harassment; and religion and disability related issues.

Core Session #4 - Managing Change in an Organization - The world is always changing and managers at every level have to respond to changes in the external and internal environment by designing and implementing changes in the way that a legal services program conducts its activities. Manager objectives in making operational change include planning and initiating the change, getting buy-in, and managing the change. This session will consider both making change and sustaining a change-oriented environment in an organization (which is often more difficult). The session will provide an overview of managing change - the importance of vision and communication in a practical context; the role of a middle manger in leading change in their office, unit or program; and a practical review of some analytical tools to help managers decide when change is possible and how to create sustainable change.

Elective sessions may include:

Managing Conflict - Nothing in your position description talks about it. Orientation to management may only mention it in passing. No one tells you about it in your job interview. Yet, if you are a manager, you *are* a mediator and sometimes an arbitrator. It comes with the territory but generally without a road map or a guide. The session will provide a framework for analyzing conflict and some tools for managing conflict within your organization which can transform differences into productive outcomes.

LSC and Non-LSC Programs Working Collaboratively, or - How to Avoid Sibling Rivalry? - The restructuring that has taken place over the past five years has resulted in service areas with two or more civil legal service programs. Some are divided according to funding source (LSC vs. non-LSC), others by function ("brief service Hotlines" vs. extended representation). This workshop is designed for Managers who already are involved in such "mixed" relationships as well as those who might be in the future. Participants will share experiences and insights about such issues as communication among staff, priority setting, creating trust and respect, funding, and ways to describe and "market" the delivery system to the wider community.

Financial Management for the Rest of Us - An overview of key financial concepts and discussion of participant questions and concerns regarding financial management in a legal services office or unit, moving from a new idea to a budget to monitoring. Designed to reveal useful tools and perceptions for managers who don't usually create financial documents or keep financial records. Topics will include: budgeting for a grant; how money is charge to grants; basic LSC and federal rules about showing whose money is used in an activity.

Improving Employee Performance - This session will discuss how to improve an employee's performance while preparing for any outcome. When employee performance is an issue, the manager must tackle the difficult questions of appropriately matching task to person, identifying problems that need improvement and that can be improved, documenting problems, interpersonal communications, monitoring progress, rewarding employees. It will discuss program systems that facilitate good problem solving with individual employees.

Fundraising and Marketing for the Middle Manager - We are reminded almost daily how important it is for legal services programs to have a diversified funding base. Middle managers can play an important role in fundraising to ensure the financial security of their program. In fact, fundraising success cannot be achieved without middle managers, who can be proactive in developing grant ideas, who can successfully administer contracts, who can develop partnerships with others in the community. Besides, fundraising is fun! Come to this session to find out. Our discussion will include the role of the middle manager in identifying fundable issues, locating potential funding sources, collaborating with the ED and other staff to design a project, and coordinating funding applications.

Effective Advocacy under the LSC Restrictions -While restrictions on Legal Services Corporation-funded legal services programs limit programs from representing some potential clients and place limits on certain types of advocacy, the restrictions do not restrain effective, zealous advocacy on behalf of clients. It's important for managers and the advocates they supervise to be very familiar with the restrictions so that advocacy isn't unnecessarily "chilled" because advocates are not sure whether their activities might run afoul of the restrictions. This session will address the Supreme Court's recent Velazquez decision, the restrictions that have the greatest impact on practice in LSC-funded programs, and strategies for effective advocacy within the limits of the restrictions.

Coaching and Mentoring - This primary focus of this session will be on the middle managers' role as coach, including coaching techniques and special issues, for example, friendships, gender/racial/sexual orientation/ and class differences, motivation, and leadership development. The emphasis of this session will be on working with employees to help them find their way to excellence in advocacy and support, and recognizing and nurturing leadership. The session also will discuss how middle managers can realize the coaching and mentoring they themselves need.

Strategic Planning - Many programs--especially those that have been restructured--are asking themselves: how do we unite our sometimes disparate elements into a single, targeted effort to improve the lives of poor people? Strategic planning offers a way to clarify values, define a purpose (or mission) for the program as a whole, select service delivery strategies, and allocate resources to strategies. This workshop will consist of: 1) an in depth review of the articles on planning in the materials; 2) a review of two strategic plans - from Indiana Legal Services and western New York; 3) a discussion of how these plans were developed; and 4) suggestions about conducting a strategic planning process in your own program.

The Good, the Bad and the Ugly: the Challenge of Performance Appraisals -Performance appraisals often are the most challenging and difficult part of a manager's job. They can be stressful, and at times ineffective, or worse, avoided. Join us to examine a variety of approaches and techniques to make the process more effective (and less painful). We will discuss questions such as how to set up the supervisory relationship so that performance appraisal works; what techniques can make the process more comfortable and effective; and how to set improvement goals that are achievable.

Using Technology to Manage - This workshop will cover aspects of the relationship between technology and legal services programs that are important to middle managers. Topics will include the use of a web page to expand services, market the program, raise funds and motivate staff; using substantive law "list serves" for peer support and staff training; mastering presentation software for CLE; and using case management systems as a supervisory tool. We will also look at how you can use technology to make your office and your staff more efficient; how you can use technology to reach clients; how technology can enable you to build better networks with outside organizations and individuals; and how to manage the blurring of lines among job categories that technological advances can engender.

Measuring and Evaluating Outcomes - Building on the core-session outcome theme, we will develop the idea of using outcome analysis in developing a better way to understand the object of advocacy and planning. Outcomes express the underlying reasons for doing work for clients and communities, and are very helpful in management and leadership of cases and projects. This elective will teach the basic terms of outcome analysis and assessment, explore their use in a particular substantive context, review an outcome-based plan from a local program and give participants a brief experience of developing outcomes for a case or project.

Managing with Unions - What is the role of middle managers in programs that are unionized? Managers will have differing legal obligations and responsibilities depending on whether they are members of bargaining units or not. Often managers who are not directly involved in negotiations have to deal with the disruption that sometimes accompanies negotiations. How do you avoid having strained relations at the bargaining table spill over into the daily work? How can middle managers keep the lines of communication open? What are the frustrations, challenges, and opportunities of managers who are part of the bargaining unit and those who are not?

Planning Across Substantive Issues to Meet Client Needs - In our rapidly changing environment, our clients and our programs must adjust to new legal issues and needs, often crossing traditional substantive specialties.. What can managers do to ensure their programs meets client needs in a flexible and creative fashion? Managers will discuss working within the program to develop approaches and systems, and working with outside the program with community partners, to help participants identify strategies for creating responsive and flexible approaches to legal work.

Tough Decisions: When Staff Need to Leave - This session will discuss employees with problems and the tough decisions managers need to make when staff need to leave. It will cover the when and the why of counseling someone out, as well as firing someone. Specific topics to be addressed include the steps in a firing, documentation, confidentiality, involving outside counsel, ADA considerations, and references. It also will include managing the aftermath of the departure, rebuilding office relationships.

Mergers - This session offers guidance, helpful hints and checklists for middle managers whose programs are merging with other programs. Also, the session will highlight ways that middle managers can be leaders in mergers.

Hiring, Training, and Orientation - This session will help you strategize your hiring decisions to best match program needs. Topics will include how to hire someone - deciding what you are looking for (beginner, experienced, diversity concerns), where and what to advertise, reaching out for the candidates you really want, how to use a hiring committee, reading a resume, questions to ask, hypotheticals to use, tests to administer, using second interviews, reopening the process, affirmative action issues, rating applicants, and more. The session also will explore what to do after hiring, with orientation and training issues, to help ensure that after the first day things go smoothly for your new hire and you.

Time Management - Feeling like the day gets away from you without your accomplishing enough? Is there always so much to do and so little time? Learn about common time wasters and share tips and techniques on enhancing efficient use of your time.

Maintaining a Safe Workplace - The safety of staff and clients in the workplace is an increasingly pressing concern of managers and one of our fundamental responsibilities. Can you identify the potential for violence within your office? What strategies do you have in place to respond when there is a crisis? Learn about and discuss practical ways to diffuse dangerous situations and address them when they do arise.

III. **What Methodology is Used?** Panel presentations by legal services staff and outside presenters, with significant opportunity for interaction with audience.

IV. **Number of Days:** 3 days

National Fundraising Conference

I. **Who Should Attend this Training?** This conference is intended for board members, volunteer fundraisers, executive directors, development directors, grant writers, office or unit managers - and any other staff member who wants to help funding grow - in your legal services, IOLTA-funded, pro bono, protection and advocacy, Title IIIb or other civil legal assistance program serving low-income clients.

II. **What is Taught at this Training?** Elective sessions including:

Welcome to the Community! A Roundtable for Fundraisers New to Legal Services - For newer members of the legal services community, a roundtable discussion facilitated by veteran development officers who began their careers in other sorts of charitable organizations, but now call legal services their professional home. A chance to exchange information both with experienced fundraisers new to our community, and with others new to fundraising **and** to legal services.

Foundation Fundraising - Two sessions on foundation fundraising. One a favorite from prior conferences on the nuts and bolts of foundation fundraising. Topics will include: selecting appropriate projects for funding; the distinct types of foundations; foundation internal practices; protocols for meeting with funders; and collaborative proposals. The second session beyond the basics to take an advanced look at foundation fundraising.

Secrets of Successful Grant Writing - The basics of effective proposal writing, covering topics such as developing an effective case statement; legalese versus common parlance; use of effective data; using client stories; and proposing realistic measurable outcomes.

E-mailing for Dollars - On-line technology can be used as a fundraisers's tool to build closer and stronger relationships with donors.

Developing a Successful Cy Pres Strategy - *Cy pres* awards have proven to be a valuable source for large infusion of funds for some legal services programs around the country. Those that have been successful have taken a planned, strategic approach to gaining the support of the judiciary and the bar.

Developing an Effective Fundraising Board - Effective volunteer fundraising boards, committees, or campaign groups are key to expanded and diversified funding in legal services programs.

Raising Funds for Health Care Initiatives - With health care an increasingly important area of concern for low-income persons, several legal services programs have responded with successful new programs.

Pro Bono and Legal Services Programs: The Fundraising Nexus - Exploring the issues of pro bono and raising funds for legal services programs: Is there competition between a program and a free-standing pro bono organization? Should attorneys be expected to give both time and money? How should locally raised funds be allocated between pro bono and staff programs?

Developing an Effective Press Strategy - Developing and implementing an effective strategy for dealing with the press.

Fundraising Within the Context of State Planning - Requirements of the Legal Services Corporation that programs engage in state planning processes have brought issues of resource development to the fore, including looking at the potential for collaborative fundraising and issues of disparate funding levels and resources.

Fundraising in Rural Communities - Raising money in and for rural service delivery areas offers unique opportunities and challenges, including relationship building in small communities, special events, local United Way issues, and resource allocation issues for programs with urban and rural areas.

Fundraising Software - Discussion of various fundraising software packages for the development office, including Raiser's Edge, Paradigm and web-based options.

Governmental Fundraising - Two sessions discuss governmental funding: federal, state, and local - excluding direct appropriations, filing fees etc. One session will provide an overview of the funding streams, identifying funding opportunities, and budgeting. A second session will discuss building long-term relationships with governmental funders, spotting new funding trends, and budgeting indirect costs.

Building Relationships with Major Donors - Discussion of techniques for organizing campaigns for major gifts in the context of annual giving campaigns, capital campaigns, and planned gifts.

The Successful Development Plan - Defining the basic elements of a fundraising plan for a legal services program.

Organizing or Revitalizing a Private Bar Campaign - A basic overview of annual bar campaigns and a practical guide to how to determine the feasibility of a campaign for your program. Basic strategies such as selecting campaign leadership, setting campaign goals, securing gifts from major donors, developing written materials, and planning events.

Strategies for Raising Funds from Corporations - Securing the support of corporations for the cause of equal justice.

Using Reconfiguration for Marketing and Fundraising - Program reconfiguration or merger provides a unique opportunity for developing the profile of the new organization, maintaining existing community support, and expanding the base of financial support.

Collaboration - Increasingly funders look to multi-disciplinary approaches to solving community problems based on collaborative relationships among and between separate nonprofits. Alternative methods of collaboration, principles to decide when collaboration is appropriate and effective, examples of collaborations among legal services programs.

New Entrepreneurial Activities which Fund Program Services - Crating partnerships with individuals and/or entities who economically benefit from program services. Internal program systems and structures which are critical to the successful implementation of an entrepreneurial approach to fund raising.

III. **What Methodology is Used?** Panel presentations by legal services staff and outside presenters, with significant opportunity for interaction with audience.

IV. **Number of Days:** Typically 3 days. Segments of fundraising training can be carried out in a shorter time frame.

National Conference for Legal Services Administrators

I. **Who Should Attend this Training?** All of those staff members who carry out a broad range of administrative functions: fiscal; grant writing, compliance and coordination activities; compliance in general with funder requirements; benefits administration, human resources, and training; and general office management, including facilities, contract negotiation with vendors, and technology. These staff have many titles and these functions are often shared by a number of program staff.

II. **What is Taught at this Training?**

Plenary #1 - Leadership - the importance of administrators building a partnership with the executive director. A successful effective relationship must have equality, respect, trust, mutuality, open communication, reliance on each other. Also building bridges with middle management on the legal work. How the partners fit in to decision making and implementing. Administrator's role in developing and implement policy.

Plenary #2 - Overview on Technology

Plenary #3 - Employment Law - Topics to consider include: hiring; documenting; wage and hour laws, application to professionals, who is exempt/not exempt; personnel files - contents, confidentiality; distinctions between union/nonunion; sexual harassment, ADA, FMLA, role of administrator vis a vis executive director or other supervisor in employment law matters.

Plenary #4 - Diversity - creating climates of inclusion. Administrators role as a leader in promoting diversity. Hiring, office climate, team building.

Elective sessions may include:
Facilities management - Woes of the office kitchen; Emergency planning - put together a resource kit with sample policies, help resources, web sites and template for use by programs for emergencies (Sue has one); security/office safety - formulate discussion and offer checklist for theft of personal and program property, staff safety, controlling access to the office - barriers, security windows, touch pads, etc., confidentiality/security of client info - offer policies, staff safety ideas - protocols for alarms, etc.; Q & A - misc: property insurance, lease negotiation, cleaning and clutter, space design - use of space planners, etc.

Technology - Planning-upgrading, budgeting, etc.; Troubleshooting; Working with IT staff or consultants-options; Staff issues – sample computer/email use policies; Best/successful approaches to change; Incorporating new tech into practice (case management, etc.); Ergonomics; accommodation, (Carpal tunnel, chair, furniture, mouse, keyboard etc).

Vendors/Purchasing - Negotiating; Learning from vendors; Library - books vs Westlaw/Lexis-how to make the change-sample memos and success stories; RFP's – offer some templates, resources, software suggestions; Credit cards – to have or have not, process to acquire, board action; Purchasing resources- magazines, websites.

Administrator's changing position - Jack/Jill of all trades - Panel with paired administrators and project directors on merger/growth/change/issues; once a small program, now a large type issues; managing branch offices- either new or old

Fiscal Issues - Mergers & Acquisitions; Budgeting: Multiple funding sources, multiple branch offices, etc.; General ledgers to accommodate fund & program reporting; grant compliance; Accounting software; Financial Policies & Procedures Manuals: Formalized policies regarding accounting components and fiscal management.

Grant Activities - Basics of writing grants that get results for non-development staff; tips for working with a group (i.e.: advocate(s), exec director, accountant) to make sure grant proposals consider how all these aspects of the program need to work together in order to submit the grant, and then bill it out completely, while staying in compliance with the requirements of the grant; how should a program determine who is responsible for making sure your program is in compliance with all aspects of grants or purchase of service contracts (fiscal, hourly billing, quarterly reports, audits), and how do you set up ticklers or programs (spreadsheets, etc) to track the requirements and gather the information; how timekeeping, billing and fund accounting systems need to be coordinated to allocate direct and indirect costs when you are applying for and complying with grants.

III. What Methodology is Used? Panel presentations by legal services staff and outside presenters, with significant opportunity for interaction with audience.

IV. Number of Days: 3 days

Managing Projects

I. Who Should Attend this Training? This training is for all staff members whose responsibilities include managing projects. Seeking 100 new pro bono attorneys? Attacking the lack of day care options for low-income single parents in your community? Implementing a new grant? Developing a new grass-roots fund-raising campaign? Starting a housing law task force? Creating a statewide initiative on the prevention of domestic violence? Equalizing salaries and benefit levels in your region? Trying to improve the quality of your pro se clinics? These are all projects.

Whatever the legal services job, one is managing a series of projects. From inception to completion, a project management approach to getting the job done will make the work easier, the team more effective and the results more satisfying. With a project management approach one can deal more successfully with the too many deadlines, too many projects and too much stress.

II. What is Taught at this Training? In this one day training, using a project of one's choosing, we will walk through the stages of management of a project:

Starting your project off on the right foot with a clear definition of the project and its purpose.
Obtaining a commitment from people key to the project's success.
Learning a step by step process for organizing the project tasks and resources.
Developing a written plan.
Building agreement in a team.
Monitoring and modifying the project while tasks are being completed.
Maintaining relationships, managing performance, and evaluating results.

At the end of the day you will have experienced the tools successful managers use to ensure project success. You, your project team, and your organization will benefit immediately from this practical, skill building workshop.

III. What Methodology is Used? Throughout the day, lecturettes from the trainer are followed by work on the project of one's own choosing, using tools contained in the conference notebook which illustrate the material in the lecturette. This training may be accompanied by a second day of individual consulting on specific projects.

IV. **Number of Days:** 1 day training, optional second day of individual consulting on project(s)

Managing Up! Developing a Board that Makes a Difference

I. **Who Should Attend this Training?** Executive directors, program managers and board members who have asked yourself:

- Are board members and key volunteer committees really valuable to our program? Can they make a difference?
- How can we recruit effective board members?
- What power do I have as executive director to strengthen board performance?
- What can we realistically hope for from our board?
- How should our board be involved in setting program mission and priorities, and in planning?

II. **What is Taught at this Training?** In this one day training, you will learn:

- the basic roles and responsibilities of nonprofit boards
- how to orient the board to ensure that members are active, engaged, educated and ready to participate in the governance of the organization
- techniques for maximizing effective client member contributions
- how to help the board govern more and manage less
- how much information to provide the board and how to convey it
- proven ways to increase the productivity of board and committee meetings
- effective participation of the board in fundraising and political efforts.

III. **What Methodology is Used?** A skilled instructor guides several panel presentations by legal services program staff members and adds additional content about developing effective boards of directors.

IV. **Number of Days:** 1 day

Managing Technology

I. **Who Should Attend this Training?** This training is designed for the executive directors and managers of programs that deliver legal assistance or legal information to low income persons, including LSC-funded, IOLTA-funded, elder law, pro bono, and protection and advocacy legal services programs.

II. **What is Taught at this Training?** With technology experts and legal services program staff, this training will explore questions which often confound executive directors and managers: How do we manage the technology in our programs? Where does the money for technology come from? How do we plan upgrading and expansion? How and how often do we best provide training to staff? Who should provide the technical support to our technology systems? What technology policies work? How do we make creative use of technology to improve client services? Should we be laggards or explorers in the new technology frontier? Specific agenda items including: Setting the stage: How technology can improve our service to clients; The practicalities of technology: Budgeting, staffing, training, upgrading, technology policies; Planning for technology - it looks like strategic planning; and roundtable discussion.

III. **What Methodology is Used?** A skilled moderator guides several panel personations by legal services program staff members.

IV. **Number of Days:** 1 day

Managing Multiple Funding Sources

I. **Who Should Attend this Training?** The executive directors and managers in legal services program which have multiple sources of funding, and would like to learn new skills and new tools for managing those funding sources.

II. **What is Taught at this Training?**

- How to develop an accounting system that satisfies your auditors and funders.
- How to link timekeeping and accounting.
- How to use FTE analysis to deploy individual advocates among several fund sources.
- Tools for knowing, during the year and as year end approaches, how much time and money has been spent on each fund source.
- Better communication among managers, accounting, and advocates to develop proposals, inform case acceptance, achieve grant objectives, and spend down grant funds on funded activities.
- Paper and computer forms that can be generated to aid in the management of funds.
- How to develop appropriate budgets.
- The golden rules for deciding when to apply for a new grant.
- Recognizing the staffing implications of new and expiring grants.

III. **What Methodology is Used?** Case studies with extensive materials that document systems actually in use in programs with many funding sources will demonstrate the nuts and bolts of setting up or improving a fund source management system..

IV. **Number of Days:** 1 day

Employment Law

I. **Who Should Attend this Training?** Unionized and non-unionized programs. If you are an executive director, human resource director or member of the management team in a legal services program, with or without a union, who wants to update your knowledge of employment law and related issues, this training is for you.

II. **What is Taught at this Training?**

- Expert labor counsel presentation with legal services panel: collective bargaining basics; definitions of bargaining units; mandatory and voluntary subjects of bargaining; new unions; questions and answers. Large group discussion: Role of the executive director, managers, board of directors and labor counsel in bargaining; emerging collective bargaining issues.
- Expert labor counsel presentation with legal services panel: handling grievances effectively; discipline and discharge issues in the unionized program; new arbitration and NLRB decisions in legal services and elsewhere.
- Roundtable on collective bargaining issues with moderator.
- Expert employment counsel presentation with legal services panel: Privacy issues; new developments under the Americans with Disabilities Act, including depression and lawyers= claims; sexual harassment; investigations and dispute resolution; insurance coverage for employment law claims.
- Expert employment counsel presentation with legal services panel: the Fair Labor Standards Act; hiring, including reference checking, interviewing, affirmative action, and reverse discrimination; firing; technology and telecommuting; temporary workers.
- Panel and large group discussion: "What did these employers do wrong? And right?" - Practical advice for executive directors, human resource professionals, and other managers.
- Roundtable on employment law issues affecting both unionized and nonunionized programs with moderator.

III. **What Methodology is Used?** The training will include presentations, panel discussions, roundtable discussions, and materials.

IV. **Number of Days:** 2 days

Making Mergers Work

I. **Who Should Attend this Training?** The executive directors and managers of legal services programs which are considering or implementing mergers, or which have recently merged.

II. **What is Taught at this Training?** The training may include: nuts and bolts of mergers; lessons from mergers; a discussion of patterns that have emerged among merged programs; planning in the larger more complex program; pursuing better services through mergers; overcoming barriers to change and the emotional impact of sudden change; integrating culture; developing adequate program organization and administrative staffing; communicating in the larger program; and a confidential roundtable discussion of actual issues in your program.

III. **What Methodology is Used?** Panel presentations by legal services staff and outside presenters, with significant opportunity for interaction. Confidential roundtable discussions.

IV. Number of Days: 2 days

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