

# Management Information Exchange

AN EXCHANGE OF INFORMATION FOR LEGAL SERVICES • VOLUME XV, 4 • WINTER 2001

## JOURNAL

### Board of Directors:

M. Victor Geminiani, Chair  
*Legal Aid Society of Hawai'i*  
Mary Asbury, Vice Chair  
*Legal Aid Society of Greater Cincinnati*  
Judy Garlow, Secretary/Treasurer  
*State Bar of California*  
Jacquelynn Bowman  
*Greater Boston Legal Services*  
Dennis E. Bricking  
*Legal Aid Society, Louisville*  
Hanna Cohn  
*Volunteer Legal Services Project of Monroe County*  
Bruce Iwasaki  
*Legal Aid Foundation of Los Angeles*  
Jan May  
*AARP/Legal Counsel for the Elderly*  
Patrick McIntyre  
*Northwest Justice Project*  
Rita McLennon  
*National Center on Poverty Law*  
Sheldon Roodman  
*Legal Assistance Foundation of Metropolitan Chicago*  
Toby Rothschild  
*Legal Aid Foundation of Los Angeles*  
Steve Xanthopoulos  
*West Tennessee Legal Services*

### Journal Committee:

Patrick McIntyre, Co-chair  
*Northwest Justice Project*  
Jan May, Co-chair  
*AARP/Legal Counsel for the Elderly*  
Dennis Bricking  
*Legal Aid Society, Louisville*  
Stephanie Choy  
*Public Interest Clearinghouse*  
Victor Geminiani  
*Legal Aid Society of Hawai'i*  
Lynn Kelly  
*MFY Legal Services*  
David Neumeyer  
*Virginia Legal Aid Society, Lynchburg*  
David Yoder  
*Knoxville Legal Aid Society*  
Patricia Pap  
*Management Information Exchange, Boston*

### TABLE OF CONTENTS

From the <i>Journal</i> Committee	2
Will Deep Waters Run Shallow? The Danger to High Quality Legal Services in an Era of "Full Access" <i>John F. Ebbott, Executive Director, Legal Action of Wisconsin</i>	3
Suddenly Larger Programs: Some Initial Observations <i>John B. Arango and Gerry Singen</i>	13
De-escalating Potentially Violent Situations in Legal Clinics <i>John Ross Done, LL.B., LL.M., Executive Director, Kingston Community Legal Clinic</i>	23
Features	
<b>Interview: Carolyn Olive, Client Representative Board Member, Indiana Legal Services, Inc.</b> <i>Interview by Colleen M. Cotter, Indiana Legal Services, Inc.</i>	27
Book Review: <i>First, Break All the Rules: What the World's Greatest Managers Do Differently</i> <i>Marcus Buckingham and Curt Coffman</i> <i>Reviewed by Ellen Rinehart, Associate Director, Public Interest Clearinghouse</i>	31
Fundraising: Critical Juncture Financing: Getting the Cash to Problem Solve <i>Thomas McLaughlin</i>	34
Worth a Look: Nonprofits: the Dot Coms, the Dor Orgs and Other dots for Grants, Grant Writing, Management, Advocacy, Human Resources and More <i>Don Greismann</i>	36
Crossfire – A Puzzle	37
Special Feature: Inclusion, Diversity and Cultural Competence – Putting Feet on our Values <b>A Beginning Conversation on Diversity and State Planning</b> <i>Compiled and edited by Lillian Moy</i>	38
Cultural Competence – A Client Centered Approach to Diversity in Massachusetts <i>Myra Hindus, Director, Massachusetts Legal Services Diversity Coalition</i>	45
Diversity in our Programs Makes Us Better Lawyers <i>Lynn Kelly, Executive Director, MFY Legal Services</i>	47
Multiple Players Needed to Solve Student Loan Debt Crisis <i>Sheila Seigel, NAPIL</i>	49
Religious Diversity in the Workplace <i>Azhar Hussain and Gayle Brock</i>	52
<b>Training Notices</b>	55

# INTERVIEW



## CAROLYN OLIVE, CLIENT REPRESENTATIVE BOARD MEMBER, INDIANA LEGAL SERVICES, INC.

*Interview by Colleen M. Cotter,  
Indiana Legal Services, Inc.*

Question: Carolyn, tell us a little about yourself.

Answer: I am the mother of 4, grandmother of 19 and great-grandmother of 12. I've been on the Indiana Legal Services, Inc. (formerly Legal Services Organization of Indiana, Inc.) board for over 25 years. I am a past Board President and am now the Secretary of the Board.

Q. How did you get involved with legal services?

A: I got involved because I got angry. I used to get welfare and food stamps. I had a lot of problems with the system. I had one food stamp problem in the 1970's that got me so angry I had to do something about it. I kept going to the food stamp office, they kept giving me the run-around and not getting me my stamps. I finally got angry. When I get angry, I do something. I went to the legal services office (then, Legal Services Organization of Indiana, Inc.). I got a lawyer to help me, but he was moving too slow, and I really needed those stamps. At the same time, I started working for a welfare rights organization. My boss started advocating for me too, calling the caseworker. That really upset my lawyer, who told me that if I wanted the welfare rights organization leader to represent me, that was fine. He didn't seem to understand that when clients have problems they are "right now" problems. We need action now. We expect communication and action right away.

Q. What did you do?

A: I got angry at the attorney. I went to the office to look for that attorney. I remember the floors were white marble. The receptionist told me that the attorney was not there. I left and went to the food stamp office. The caseworker wanted me to sign

papers about selling my 1972 Nova that I was paying \$75 per month on to get myself to work. It didn't have a radio or anything, but they wanted me to sell it. I refused to sign the paper and just took the card that would allow me to get my stamps. It turns out it was illegal for them to ask me to sign that paper, but I didn't know that. I was just angry: angry at my lawyer and angry at the caseworker.

I got involved because I got angry. I used to get welfare and food stamps. I had a lot of problems with the system. ... I kept going to the food stamp office, they kept giving me the run-around and not getting me my stamps. I finally got angry. When I get angry, I do something.

Q. What made you get involved with legal services when you were so mad at your lawyer?

A: I was working for the Indiana Welfare Rights Organization as a City Coordinator. The director was on the legal services board, but couldn't make the meetings because of a conflict. She asked me to go instead, so I went. I didn't really know what I should do, or how I should act, but I went.

Q: What did you do working at the welfare rights program?

A: I loved that work. I quit a better paying job to work there for \$75 per week. I helped a lot of people with welfare and trustee problems.<sup>1</sup> I remember one client who kept walking 15 blocks in the cold with her little boy to the trustee's office, and they kept sending her away. So, I took her to the trustee's office myself. The trustee's office folks were laughing at people, making fun of the people who came to them for help. I went into the office and got very angry at that attitude. I got into an argument with the trustee because of the way they treated my client and the way they made fun of people who needed help. They ended up giving my client what she needed.

I am most proud of how the attorneys and clients on the merger committee came to work together as a team.

Q. Sounds like you take action when you get mad.

A: I don't like people making fun of people. You never know when you'll need water or bread from someone else.

Q. What kinds of things have you done as a legal services board member over the years?

A: I have testified at the Statehouse about things like trustee issues. I remember once I testified and I told the committee: "We never know when we are going to be in a position in which we have nothing and can't get anything. That's why we need trustee assistance." It was the winter of 1978 and 2 weeks later we had the big blizzard. Later, I ran into a state representative who asked me "how did you know." He told me he was caught during the blizzard and couldn't even get essentials. He ended up pushing for the bill I had supported because he realized that I was right, you never know.

Q: Tell me about your experience on the board.

A: The first year, I didn't know anything. I was a "Yes Board Member". I didn't understand a lot of the hand-outs and the big board book. I tried to read it, but it was written for attorneys. Two things brought me out as a board member. First, I was on

the by-laws committee. I went to a committee meeting and they went through things so fast, I was still trying to read the materials. At the end, the committee chair said "you're such a good little board member." I did not like that.

I realized I wasn't actually making decisions, I was just going along. Then, I went to the board with an issue that was important to the Welfare Rights Organization and the executive director said something that made me angry. I don't even remember now. I told him: "I'm a board member, shouldn't I speak up?" His response was yes, you should. From that moment on, we had a great relationship. That made me realize that I needed to do more than just be a Yes Board Member. So, I began to be more alert and be a board member representing the client community.

Q. What did you then do as an active board member?

A: I got involved in a lot of issues, especially training clients. I liked to work with the attorney board members and staff. Even the attorney who hadn't done my case the way I wanted it done got involved in educating client groups with me. We worked well together.

Q: Tell me about your role in the consolidation process in Indiana, where the state went from 4 programs to 1.

A: I was on the merger committee, along with 3 other board members from Legal Services Organization of Indiana, Inc.: 2 attorneys, 1 non-attorney/non-client and me. We worked together to put together the plan and make sure it got done.

Q: What do you think about what you've done?

A: Merger is the greatest move that could have been made. I don't see why we couldn't have done this on our own, without LSC pushing us. I see equal representation statewide where before there was not. In some areas, there wasn't client leadership on the board. Clients were the yes board members I used to be. As clients, we can talk with each other, meet with each other and pass on our knowledge and power to help the client community. We have more power and knowledge by working together.

Q: What did the program or merger committee do to ensure client leadership during the merger process?

A: They listened. They asked us what we wanted. What were the problems. They involved us in the problem solving and in the decision making. And they appointed us to the merger committee.

Q: What are you most proud of about the merger process?

A: I am most proud of how the attorneys and clients on the merger committee came to work together as a team. At one point, one of the executive directors challenged me about what I was saying about client leadership on the board. An attorney board member from a different program stood up for me. That was an example of the teamwork we were developing. I am most proud of that teamwork: board members, clients, staff, attorneys, everybody working together.

Q: What's your vision for the legal services in Indiana now?

A: I see clients and attorneys working together on trainings to empower everyone — clients and attorneys both benefit. Attorneys are not in our shoes. Working together is an education for clients and attorneys. Clients working with staff is very important. It makes for a better relationship. If staff feels like the board is with them and behind them — that is valuable. It's important that we visit the offices, just to say hi, I'm with you. Be part of the family. We all provide better service if we give of ourselves.

Q: Do you think that the one program is going to be better than the four different programs we had?

A: Yes. Even if you have four strong programs, one strong statewide program will be even stronger than those four. The quality of our representation will increase because we will all be working together. When you had four different directors they had different thoughts of how things should be. Now we're all under one director so that all staff will have the same vision and goals so that we can together work on them. One head is better than four heads doing different things.

We need to share power to be stronger.

We need to make sure that client leaders pass leadership on and share it so that when the leaders leave, the movement doesn't fall apart.

Q: What advice do you have for new client representative board members?

A: Ask questions. There is no dumb question. Don't just go along. I remember once, the board was trying to get through the meeting to see some game on TV. But, by that time, I had been trained about how to use my position on the board. I did not understand an issue that they wanted to vote on, and it needed a unanimous vote to pass. So, I kept abstaining. They kept explaining it, but for some reason, I didn't understand. Finally, I got it and then I voted yes, just like everyone else, because I really did agree. That was my responsibility as a board member. I can't vote for something I don't understand.

Q: What advice do you have for executive directors and attorney board members about how to make sure there are client leaders on their boards?

A: Provide training for your client board members, and your attorney board members. Training is very, very important. Also — things need to be communicated in a way that clients understand not just attorneys. Involve clients in committees. Take time to show them what's going on in different committees. Take time to listen to them. Some clients don't understand. Don't act like there are dumb questions. Finally, help develop a comfortable relationship with the staff. So they can all see themselves as part of the same team. The more knowledge I have about how the program works every day, the better I can take that back to the community, and the better I can help the program work for the community.

Q: What do you think is the biggest barrier to the teamwork you value so much?

# Management Information Exchange

SPECIAL FEATURE

## INCLUSION, DIVERSITY AND CULTURAL COMPETENCE – PUTTING FEET ON OUR VALUES



### A BEGINNING CONVERSATION ON DIVERSITY AND STATE PLANNING

*Compiled and edited by Lillian Moy*



*Lillian Moy*

*This beginning conversation on diversity and state planning took place among Estela Casas, Teresa Cosby, Marc Holloday, Don Isaac, Lillian Johnson, Neil McBride, Lillian Moy, Toby Rothschild, Jan Walker and Randi Youells.<sup>1</sup> It took place by email and conference call, and was compiled and edited by Lillian Moy. Thanks*

*to all the participants for giving their time and thoughts to the dialogue, to MIE for the invitation to Lillian Moy, Lillian Johnson and other members of the African American Project Directors Association, and to Teresa Cosby for suggesting that we address Diversity Issues and State Planning. –Lillian Moy*

**Lillian M:** We agreed to begin our talk by asking why state planning and reconfigured programs require us to address diversity. Why is diversity a particular issue of concern as we deal with state planning?

**Jan:** Why is diversity an issue to consider in state planning? Isn't it like breathing to us? Isn't it a lot of what we're about? Why is it an issue??? ... I think it is good to consciously make it an issue so we can really look at it ... so that it won't just be platitudes ...

**Lillian M:** Has state planning furthered diversity in our community? In the earliest years, diversity didn't even register on the "platitude" level. We spoke about leadership and diversity of leadership

in an early, early draft of our state plan, but it was later edited out so our plan would respond specifically to one of the earlier Legal Services Corporation program letters. Are there states and regions where effective state planning has resulted in greater diversity in staff or leadership, or more effective services to diverse clients?

**Randi:** The issues of diversity within the legal services community are inextricably connected to the issues of planning. Why do we pursue state planning in the first place? Perhaps the most basic reason is that finding ways to increase and ensure "systemwide" effectiveness is made all the more urgent by the growing concern of our leaders and managers that we may not be able, in a changing society and changing environment, to meet the demands for increased and improved delivery of services without changing the ways that our organizations and systems function ... In the context of this conversation—ensuring diversity and multi-cultural competency within our state equal justice communities so that we can better respond to change on the macro level and so that we can better target our scarce resources—we need to discuss how we can ensure that our organizations and their staffs are diverse and we need to explore ways in which we can accomplish this with less frustration and difficulty.

**Marc:** I think you first need to discuss what you mean by "diversity." For some the term diversity is a broad term that embraces many different aspects of our community, including race, age, gender,

ethnicity, sexual orientation, disability, to name a few ... it's important to have a discussion about the term to set the context in which you are operating. It's also important because it helps set aside assumptions that can inhibit progress and it can help ensure that all feel included in the discussion. ... [I]t is important to incorporate diversity into state planning ... because it helps move us from the talk to the walk phase. Telling me to walk is one thing. Explaining to me why you are going to walk, where you are walking, why you want me to walk, and asking me to walk with you, as well as asking how I suggest getting to where you want to go and if there is anywhere I'd like you to walk with me, is quite another. The latter approach is the more likely way of getting me to put one foot in front of the other. Incorporating diversity into state planning provides the opportunity to explain why and where you are walking, to map the path for reaching your destination, and to get others to walk there with you.

The issues of diversity within the legal services community are inextricably connected to the issues of planning.

*Teresa:* We must all remember that while diversity is an institutional issue it is also a personal issue. Success in bringing this issue to the forefront depends on the individual willingness of people within an organization to put the topic on the table and to keep it there. An example would be South Carolina's state planning process. After the diversity conference sponsored by LSC and the National Legal Aid and Defender Association in Washington in May, each individual in the room assumed personal responsibility to promote diversity within their particular organizations. In South Carolina we were pulling together the Board structure for the new organization. Up to that point diversity had not been discussed or even considered. Once the issue was placed on the table it was readily embraced by the majority.

*Lillian M:* How are you dealing with it on the Board level?

*Teresa:* We have a majority who agree that diversity is an issue and so we got specialty bars to make appointments, two from women lawyers, three from black lawyers. But there is a faction who don't think that those groups should get any preferential treatment ... This ... illustrates the immediacy of addressing diversity as state planning is occurring now. This process promotes the best opportunity to include diversity initiatives in our state plan. These initiatives can track the national strategy to basically "bring it home" and make a real impact on our national justice communities. Viability is also attained for these initiatives when we can say they are supported by LSC and NLADA.

*Lillian M:* Is that kind of attention being paid to diversity in board composition in other states that have moved to statewide programs or much larger programs?

*Randi:* Since the May diversity conference, I have heard from a number of people who actually made a personal commitment at that conference to bring diversity home to their state justice communities and are doing so. Since then, there has been some aggressive or assertive efforts by people to try to introduce the subject of diversity, multi-cultural competency and leadership within the discussions that are taking place in state justice communities.

*Neil:* The reorganization and collaborations arising out of state planning give us an opportunity to address some of the obstacles to diversity on our staffs and in our work, but also raise a new set of problems that need to be addressed. At the very top, the combination of programs will reduce the number of women and minorities who have formal roles in national forums. We need to be very explicit about how people below the level of director can exert national leadership and learn from the experience ... One of our challenges is to make sure that the leaders of larger institutions begin immediately to take advantage of their size: regional recruitment fairs are now feasible when they were not before ...



*Toby Rothschild*

*Toby:* With a small program, I had a new lawyer to hire every other year or so as opposed to knowing that there is going to be enough turnover that it makes sense to do those kinds of fairs.

*Neil:* We should [also] be more flexible about offering professional development among different offices and units. We should look right away for the means to engage women and people of color in state, regional and national initiatives. Is anyone looking at how well the big new programs are taking advantage of these opportunities?

*Lillian M:* Toby, have you seen any of that play out with Long Beach joining a much larger program?

*Toby:* Yes. There is no questions that we have now started moving people around within the organization, the Long Beach office has seen a greater increase in diversity. We brought in some new people. I think there has definitely been changes in that way that have been positive.

*Lillian M:* Toby, in the process that led to your reconfigured program, did you address the issues of diversity in terms of staffing or client services in your planning and in your implementation?

*Toby:* In terms of the specific merger of L.A. and Long Beach, it was not something that was on the surface anywhere. It was not discussed anywhere ... As to diversity in service delivery in the region, when the now three programs in the L.A. County region looked at advocacy together, that was an issue we have been addressing and looking at. For example, we are addressing Asian language intake as a joint project of the three programs with a non-LSC local program in a way that none of us could have done alone.

*Jan:* And not only do we need to look at diversity in terms of race, gender, sexual orientation, disability but also I think we need to look at diversity as where different people are coming from, where they come out of. For example, ... lawyers and non-lawyers ... I think we haven't made full use of

just a tremendous resource that is non-lawyer advocates.

*Toby:* That gets to Marc's point about each person when they think about the word diversity, a different image comes to mind and one of the first things that any group talking about it has to do is to say "what do we mean, how do we define diversity, how broad is our concept of diversity?"

*Jan:* I think another diversity is rural/urban. I feel that we're going to have to look at it with larger programs.

*Lillian M:* Although my sense is that that one does get addressed. Especially in state planning, it's one of the first issues ... when we think about the geographic impact of reconfiguration, it's the first

Since the May conference that took place here in Washington DC, ... a number of people ... actually made a personal commitment ... to bring diversity home to their state justice communities and are doing so.

thing that comes up. It's even what I hear LSC is talking about ... should an urban area anchor the rural area around it.

*Teresa:* In the South Carolina process that area has been the most discussed.

*Randi:* I think we're more comfortable at least having the conversation about urban/rural differences or what we're going to do to ensure that urban clients are served equally with rural clients or vice versa. I think we're much less comfortable having the discussion about racial and ethnic diversity demands that are being made on state justice communities.

*Jan:* I guess I would be inclined to agree. ...but I still feel strongly in regard to the lawyer/non-lawyer.

*Randi:* I do think you're right, that there are times that many non-lawyers would say that they are not valued for their uniqueness and personal contributions just as there are many women or many Asian Americans or many African Americans who in certain environments say that they're not valued. So it does lead us into that rich tapestry of the diversity conversations.

*Lillian M:* It's very common that the attorney staff remain primarily white but that the paralegal and support staff are primarily people of color. When we look at an organization's diversity, if we're not valuing and respecting non-lawyers ... then we're cutting out a lot of the people of color.

It's very common that the attorney staff remain primarily white but that the paralegal and support staff are primarily people of color. When we look at an organization's diversity, if we're not valuing and respecting non-lawyers ... then we're cutting out a lot of the people of color.

*Don:* It is not enough to have persons of color as our receptionists and secretaries and paralegals. Managing Attorneys, Litigation Directors, Deputy Directors, and Directors positions also should be as diverse as our client populations ... In Florida, because of mergers, ... [there is] the real possibility that there will be one person of color in a director position in the entire state, LSC funded or not. Although through change opportunities arise, there is very little prospect of a contingent of persons of color being in a position to assume directorships or positions of leadership in the near future. To my knowledge, there are no more than 10 management level attorneys who are persons of color in the entire state in legal services programs. Yet Florida is one of the most diverse states in the country. I think this is wrong.

*Estela:* Diversity can have a broad meaning and is perceived differently by individuals, but for state planning purposes, the question is whether we as a justice community are truly committed to not only diverse leadership within various levels of our organizations, but whether or not we value that same diversity at the top level of those organizations just as much. We should all be concerned that the impact of state planning in Florida may result in only one director who is a person of color. However beneficial the effects of state planning are, if in the end the result is that the reconfiguration process eliminates everyone except white males from positions of leadership, then while we have talked about "going forward," we have in fact "walked backwards." The net effect is that our client population also walks backwards with us.

Having said this, diversity for diversity's sake alone is not the goal. We must insist, for the benefit of our clients, that our diverse leaders possess multicultural competencies in order to adequately respond to the ever changing faces and needs of our client communities.

*Lillian M:* With regard to mid-level management, I'm electronically trying to collect the names and email addresses of middle managers of color who are in the New York/New England area for purposes of developing a mailing list ... tell me, would the number 20 to 25 middle managers of color be surprisingly low to you in this region?

*ALL:* Yes.

*Lillian M:* I have been ruminating ... how low could this number really be?

*Teresa:* Well, this may help. In South Carolina, where we have an African-American population of 30%, we only have five black male attorneys in legal services in the State. That was a figure that shocked me.

*Neil:* To me, that emphasizes what I've been saying for sometime now about the need for a lot more data and a lot more sophisticated analysis of the data that we have. We just don't know except by feel what has happened over the last ten years in terms of longevity, position, sex, race; the lack of infor-

mation is really an obstacle to knowing where we need to be putting resources.

*Lillian J:* What does [our] leadership look like now and what will it look like in, say, five years? And what is the community's responsibility to make changes?

*Jan:* I think that leadership begins from the very beginning. What I mean is that I think one of the things that we can do is have our offices really connect up with the law schools. Offer opportunities for clinical placement for people and offer people who would offer diversity to offices.

*Lillian M:* At the recent African American Project Directors Association meeting, I think it was James Head who said we ought to bring high school and college kids in who are from the communities that we're serving and give them an inspirational view of what legal services work can do before the world makes them less idealistic.

*Teresa:* I think that we could have more structure to the process. Once we bring people into our program then how are we going to train them to be leaders? I have always liked the concept of the Leadership Training Institute. Something along that line so we can have a more structured nationwide process to bring people into the legal services culture and to cultivate them into effective leadership roles. Even if it isn't the traditional roles, and I think if we are getting larger, we can create more roles ... those opportunities are there.

*Marc:* What a leadership institute adds is it allows you to work with people where they are and how they define leadership and how they perceive themselves as leaders because that's how you get people to truly take responsibility and start acting as leaders.

*Lillian J:* I just wanted to offer more specifics about what can be done locally in terms of developing leadership. I think taking advantage of opportunities that present themselves, you know, the quick fixes, but also being in a mind set that diversity is a higher priority than it has been in the past because it helps us to be more effective law firms for our clients. In addition, I think that there are opportunities for us to create an environment where new

lawyers are pending more and more time in legal services because of opportunities to be involved in their community and opportunities to be involved in the bar. Count these additional projects very much like we do cases. ... Here at Community Legal Services in Arizona we've decided to create a senior attorney position that someone who has been in practice for as little as four years could aspire to. It involves working on a case or project during a given year that will result in a significant impact on the client community. For example, a staff attorney who once was a VISTA has become the supervisor of our NAPIL housing project. She has embraced it. ... and she's taken the project and really developed it into a major success for our client community ... She's bicultural and it's resulted in a good experience all around ... When you have convinced people to concentrate on diversity, then they can take advantage of and create an environment where people will be looking for opportunities to participate more fully in delivering services to clients. That's where we'll get our pool of leadership.

*Neil:* Those are really good ideas and I think there are a number of other things that a thoughtful director can do to develop leadership. Strongly encouraging people to participate in community-based leadership programs would be a way to aggressively promote local recognition of staff. And then generally just publicizing what people do, really thinking about the media, thinking about calling attention to the efforts of people that you want to promote as leaders and those things can be sort of self-perpetuating. If you get someone in the paper a few times they're more likely to be in the leadership program, more likely to be recognized for awards and to have some real authority.

*Toby:* And again, some of those things, particularly the ones that Lillian was talking about, are beautifully suited to Neil's comments about the newly larger programs and the ability to create those kinds of things.

*Marc:* What I like about Lillian's framework (and I actually participated in a very similar program when I was with Atlanta Legal Aid), is that it allows the staff person a very comfortable framework to define what you think of as leadership and what your leadership abilities and potentials are.

... And it does have an impact on a more diverse leadership because sometimes I think that the leadership roles and the positions that we've developed historically in legal services, whether intentionally or not, are tied to different diversity aspects and do come easier for people depending on what makeup they might be. Whereas when it's more about the individual taking responsibility and developing the leadership that plays upon their skills, there's an opportunity for more diverse leadership.

... these specific actions that we take will put "feet" on our values, so that "diversity" won't be just a nice idea, a nice thing to discuss, but will truly become a reality ...

*Lillian J:* I think that's right. The other thing that goes back to the problem that we have in retaining a diverse staff, is when the project director or director of advocacy has given clear signals that what they value are lawyers who are involved in impact-oriented cases and that's it. That gives a signal also. Everything that leaders do in a law firm gives information to people who are looking to them for a signal on whether or not they are valued or their work will be credited. So that leaders have an obligation to alter their language and to alter their behavior to be consistent with a leader and a spokesperson who truly understands and appreciates the value of diversity at every level of our staff as well as throughout our client community.

*Lillian M:* Especially important for someone who is leading a state planning effort?

*Lillian J:* Absolutely important. They can't make any assumptions at all. They have to be very purposeful and they have a responsibility to do that.

*Lillian M:* When we see or hear about a leader in the state planning movement who is not demonstrating that understanding or commitment, what should we do? I'm in New York and I hear about another state, hear an anecdote or see an email??

*Lillian J:* I think you have to take that on a case by case basis. It's certainly very personal. I've made a promise to myself that there won't be a time when I either observe or overhear or I'm in a position where I'm exposed to behavior or comments that I find offensive that I won't try to act on it. Now what that action would be depends upon the set of circumstances. But I think that is at each person's individual level.

*Teresa:* I made the statement that diversity should be a personal individual value but I also think that to truly implement it, it must have some organizational impact. That you just can't isolate it and say I believe in it. We want our organization to be diverse and it can't be happenstance. There has to be some structure to it in your organization to promote it and you have to have a standard by which you're going to create diversity.

*Toby:* Not just how you're going to encourage it, but how you're going to measure it.

*Randi:* When we have these diversity conversations as we've had over the last 20 some years, we are often looking for a very quick fix, and when it doesn't happen, then we move on to other issues until five years later when we all say wow, we really have to do something about that. So perhaps what we need to do is start factoring in these discussions that we're having about diversity into our long range planning and say where do we want to be in a year? Where do we want to be in five years? What do we want our workforces to look like? What do we need in terms of recruitment and retention policies and practices to ensure that we do that when we get there and stop thinking of it as something we want to fix in the short run, although that's important but also begin now to institute policies and practices that make sure we are where want to be in 365 days or five years from now.

*Jan:* I liked and totally agree with the suggestions that we set concrete, measurable goals in developing a more diverse workforce and leadership teams ... these specific actions that we take will put "feet" on our values, so that "diversity" won't be just a nice idea, a nice thing to discuss, but will truly become a reality ... I think the broadest brush of diversity, that every one of us is a unique individual with our own "frame of reference," whether this

## MANAGEMENT INFORMATION EXCHANGE TRAINING NOTICES

---

*Saves these dates!*

---

### **NEW EXECUTIVE DIRECTOR TRAINING**

**November 6–7, 2001**

immediately preceding the NLADA Annual Conference

Wyndham Miami-Biscayne Bay, Miami, FL

**Please register by October 16, 2001**

This two day training is designed for the new directors of LSC-funded, IOLTA-funded, elder law, pro bono and protection and advocacy programs, as well as for experienced directors of new programs which provide legal assistance and legal information to low income clients.

The intent of New Executive Director training is help new directors, who typically learn on-the-job, to more quickly achieve deeper insight into their work. 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. The training will be conducted by John Arango, Algodones Associates, and members of the MIE Training Committee.

Registration: \$270 for MIE subscribers; \$370 for non-subscribers.

---

### **MANAGING WEBSITES**

**November 7, 2001**

immediately preceding the NLADA Annual Conference

Wyndham Miami-Biscayne Bay, Miami, FL

**Please register by October 16, 2001**

This one day training is designed for the executive directors and managers of legal services, IOLTA-funded, pro bono, protection and advocacy, Title IIIb, and other legal assistance programs serving low income clients. With technology experts and legal services program staff, this training will explore:

- the purpose of your website, your goals, your audience;
- how your purpose affects the technical aspects of your website, e.g. security, credit cards, database capabilities, etc.;
- website technology basics for executive directors and program managers;
- budgeting, staffing, maintenance;
- managing content;
- marketing your website to your intended audience;
- joint venture websites;
- using a website for internal program purposes.

Registration: \$160 for MIE subscribers; \$260 for non-subscribers.

Yes! Please register me for the trainings marked above.

Name \_\_\_\_\_ Title \_\_\_\_\_

Program \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

Please contact Patricia Pap, MIE Executive Director, 515 Washington St., 3d floor, Boston, MA 02111, 617-556-0288 (phone and fax), ppap@m-i-e.org. Visit the MIE website at [www.m-i-e.org](http://www.m-i-e.org).

# How to Join the Management Information Exchange

All directors and managers of legal services, IOLTA-funded, pro bono, Older Americans Act, protection and advocacy, and similar civil legal assistance programs, are invited to subscribe to MIE's services. Your yearly subscription entitles you to:

- Register at reduced fees for MIE training events,
- Receive the *MIE Journal*,
- Receive MIE's fundraising and management consulting services at reduced fees,
- Order articles, contracts, sample fundraising grants, and other materials from the MIE library,
- Call MIE as often as you like for referral to an experienced manager or information on a management or fundraising issue.

*This subscription is an eligible expense with LSC funding.*

Total program budget	Subscription Fees Annual subscription fee	Copies of <i>Journal</i>
\$0 to \$500,000	\$120	One
\$500,000 to \$1 million	\$175	Two
\$1 to \$2 million	\$410	Three
Over \$2 million	\$640	Four
Over \$4 million	\$695	Five

Additional subscriptions to the *Journal* are \$40.

We will send your *Journals* directly to the managers and addresses you specify.

---

## MIE Subscription Form

Name \_\_\_\_\_ Title \_\_\_\_\_  
 Program Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_  
 E-mail \_\_\_\_\_ Date \_\_\_\_\_

Subscription Amount:     \$120         \$175         \$410         \$640         \$695

Extra copies ordered @ \$40 each: \_\_\_\_\_ Total enclosed: \_\_\_\_\_

Please attach a list of the names and addresses of the managers who are to receive the *Journal*.

Make checks payable to *Management Information Exchange*  
 and send to MIE at 515 Washington St., 3d fl., Boston, MA 02111.

For more information, contact Patricia Pap, Executive Director, at 617-556-0288, or ppap@m-i-e.org.

Management Information Exchange  
 515 Washington St., 3d Floor  
 Boston, MA 02111

FIRST CLASS U.S. POSTAGE <b>PAID</b> RANDOLPH, MA PERMIT NO. 35
---