

# DIALOGUE

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## ABA LRIS Committee Serves Lawyer Referral Programs, Lawyers and the Public

*By Charles J. Klitsch*

Each year, over a million people contact a bar-sponsored lawyer referral service. Thousands of attorneys – mostly solo and small firm practitioners – rely on LRIS programs to build their practices.

Most of us in the LRIS community already know at least some of the work done by the ABA LRIS Committee on behalf of LRIS programs, the public and lawyers nationwide. Indeed, we are a community largely because of the work of this Committee and ABA staff dedicated to it.

The ABA Standing Committee on Lawyer Referral and Information Service is required to submit an annual report to the ABA House of Delegates on the function, activities and goals of the Committee. The following is the 2010 report submitted by Committee Chair Sheldon Warren.

### AMERICAN BAR ASSOCIATION STANDING COMMITTEE ON LAWYER REFERRAL AND INFORMATION SERVICE INFORMATIONAL REPORT TO THE HOUSE OF DELEGATES

The Standing Committee on Lawyer Referral and Information Service has jurisdiction over matters relating to consumer access to legal information and the legal system through more than 280 lawyer referral and information service (LRIS) programs across the country. The Committee assists lawyer referral programs in making affordable legal services provided by competent counsel more readily available to the public by working to improve existing services and developing new programs in areas not covered by existing programs. The Committee develops and encourages the implementation of standards and guidelines, publishes information and forms geared toward the enhanced operation of lawyer referral programs, and provides consultation and assistance to state or local bar associations and other interested organizations. The Committee also promotes an information component in every public service lawyer referral program.

The Committee's current strategic planning goals include: increasing the awareness of LRIS within the legal community and the general public through an ongoing communication plan; increasing the awareness of the marketing value of public service LRIS to a younger and more culturally diverse population of potential attorney panel members; encouraging an environment that supports innovative referral models that are responsive to changing consumer and panel members' needs; and expanding outreach to non-English speaking consumers.

The Committee is developing a mentor program that will be a web-based platform available on the ABA LRIS website. The unique feature of the ABA LRIS mentor-mentee program is that it will be housed in the local LRIS program operations. The mentor effort will include the following components: protocols for matching a mentor and mentee; contract forms for the mentor-mentee relationship; a PowerPoint presentation describing the program; podcasts on law practice management issues; and a "how-to" guide for operating a mentor-mentee program. It is anticipated that this new feature will be particularly valuable to the large number of "suddenly solo" attorneys entering the legal profession.

The Committee sponsors the annual National Lawyer Referral Workshop, which provides leadership and training on issues relevant to the daily operation of a lawyer referral service. It is the country's only national conference for lawyer referral staff, volunteer committee members and interested senior bar leaders. The 2009 Workshop was held in Baltimore, MD on October 28 – 31, 2009 and included a full-day Nuts-and-Bolts training for new LRIS program managers including sessions on call-center techniques, building an internet presence, and daily operational issues for LRIS programs. The regular conference featured, among other things, sessions on internet presence, modest means programs, ethical dilemmas encountered in program operation, dealing with ADA compliance, marketing techniques, and retaining the optimum panel size.

The Committee's field assistance program, the Program of Assistance and Review (PAR), provides individualized technical assistance and support to state and local bar-sponsored lawyer referral programs. National experts volunteer their time free of charge, providing analysis and recommendations in finance, intake and referral, record keeping, office technology, staff training, marketing, the relationship between lawyer referral and pro bono, interaction between staff, committee and board, and consumer follow up. Currently in its 24th year, the PAR program has made over 414 consultative visits to state and local bar LRISs and has an annual goal of working with 12 bar associations to provide on-site or in-depth distance consultations.

Seventy-two public service lawyer referral programs have been approved or are undergoing the approval process for use of the ABA Lawyer Referral logo and slogan. These lawyer referral programs meet the standards adopted by the ABA House of Delegates for the quality operation of a public service lawyer referral and information service. The Committee is currently reviewing all of its logo and slogan approval process and materials to ensure that it is maintaining the highest level of standards for compliance with the ABA's Model Supreme Court Rules Governing Lawyer Referral Services, and use of the ABA logo and slogan. The Committee has suspended acceptance of any new applications during this period of review.

The Committee's national awareness and outreach campaign seeks placement of news articles concerning issues related to lawyer referral. The purpose of the campaign is to create and disseminate public relations materials at the national level that will foster an awareness of LRIS as a portal for moderate-income consumers to access legal services and information. These materials are then often re-released to local and state bar association LRIS programs for further customization and distribution. In this way, state and local programs that may not have the budgetary support to undertake such efforts individually may take advantage of the various models and methods the ABA can produce on a more cost-effective basis. The Committee works with the ABA's Media Relations and Public Affairs Departments to coordinate these activities. This year the Committee also provided input into a Bar Services Division Bar Leader Toolkit on lawyer referral service. The Committee also developed a banner ad campaign with Bill McDonough of ABA Book Publishing. The banner ad campaign, containing four messages that are targeted to consumers and to attorneys, as of this writing has appeared for six weeks on all ABA web pages.

The Committee continues to provide programmatic support to the NABE LRIS Forum. The committee also runs a listserv for LRIS staff and volunteer members nationwide. Currently, more than 230 individuals participate in the listserv. The listserv is a tool for LRIS program managers to discuss issues such as software selection, fee collection matters, and ethical concerns.

The Committee disseminates information through various publications, including its portion of the quarterly newsmagazine, *Dialogue*, which informs the lawyer referral community of issues affecting the delivery of legal services by lawyer referral programs. The Committee also maintains a clearinghouse of information and forms in both print and electronic formats relating to the operation and development of lawyer referral programs, and responds to ethics and policy questions from state and local lawyer referral directors and volunteers. The Committee also publishes, twice annually, a state-by-state listing of lawyer referral programs and directors and maintains an abbreviated Internet version of this directory.



Respectfully submitted,

Sheldon J. Warren, Chair  
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