Client-Centric Legal Services: Getting from Here to There

Friday, August 14

8:00 - 8:30 Continental Breakfast

8:30 - 9:00 Welcoming Remarks

Allan Tanenbaum, Co-Chair, ABA Legal Access Job Corps Task Force

Rebecca Love Kourlis, Executive Director, Institute for the Advancement of the American Legal System (IAALS)

William Hogan III, Chair, ABA Standing Committee on the Delivery of Legal Services

9:00 - 9:15 Opening

Linda A. Klein, American Bar Association President-Elect

Engagement

9:15 - 10:15 Presentation

This session begins with a presentation discussing research that gives insights into problem-solving behavior. Who has justiciable issues? What do they do? Who do they turn to? Why don’t they turn to lawyers and courts more often? What can the legal profession do to expand engagement?

The second part of this session explores responses to the engagement deficit. How do people find lawyers now? How do we go beyond advertising, referral services and branded networks? How does the legal profession provide different avenues of access to people in different circumstances? Who are our partners? What can individual practitioners do? What is it that takes a village?

Presenters

Rebecca L. Sandefur, Associate Professor of Sociology and Law, University of Illinois at Urbana-Champaign

Will Hornsby, Staff Counsel, American Bar Association

10:30 - 11:15 Breakout Sessions

These session are dedicated to creating strategic plans for specific solutions.

1. How do we expand partnerships for pipelines within the legal community?

2. How do we expand partnerships for pipelines outside of the legal community?

3. What are the roles of preventive law, holistic law and legal check-ups?
Discussion Leaders
Bonnie Hough, Managing Attorney, California Administrative Office of the Court’s (AOC) Center for Families, Children & the Courts
Bill Tanner, Supervising Attorney, Legal Aid Society of Orange County
Forrest Mosten, Mediator, Limited Scope and Collaborative Attorney and Certified Family Law Specialist

11:15 - 11:45 Reports on Breakout Sessions

11:45 - 12:15 Lunch

Catalyst Grant Roundtable

12:15 - 2:15
In 2014, the ABA Legal Access Job Corps Task Force awarded seven catalyst grants to innovative programs across the country. Representatives of those programs will hold a roundtable discussion of their programs, focused on the benefits of the models, the barriers faced in implementation and potential for replication in other jurisdictions.

Presenters
Margaret Barry, Vermont Law School
Sam Clinch, Nebraska State Bar Association
Davida Finger, Loyola University New Orleans College of Law
Terri Ticknor Gilbert, Oakland County Bar Association (MI)
Tammy Kudialis, University of Detroit Mercy School of Law
Lee Richardson, Legal Aid of Arkansas
Bill Tanner, Legal Aid Society of Orange County (CA)

Compensation Models

2:30 - 3:15 Presentation
This session looks at alternatives to billable hours for the client-centric model. How do potential clients determine value? What are the alternatives to hourly billing? Who is using those alternatives? In what ways can alternative billing methods be expanded in the personal service market?

Presenters
Robert E. Hirshon, Frank G. Millard Professor from Practice and Special Counsel on Developments in the Legal Profession, University of Michigan Law School
Trevor Clarke, Director, Justice Entrepreneurs Project, Chicago Bar Foundation
3:15 - 3:45 Breakout Sessions

1. Which types of clients can benefit by various alternative billing methods?
2. How can lawyers be persuaded to use alternative billing methods?
3. How can institutions within the legal community help lawyers develop and use ABMs?

Discussion Leaders

Luz Herrera, Assistant Dean for Clinical Education, Experiential Learning, and Public Service, UCLA School of Law

Robert E. Hirshon, Frank G. Millard Professor from Practice and Special Counsel on Developments in the Legal Profession, University of Michigan Law School

Trevor Clarke, Director, Justice Entrepreneurs Project, Chicago Bar Foundation

3:45 - 4:15 Reports on Breakout Sessions

4:15 - 5:15 Self-Representation and the Role of Lawyers: A report on the research of IAALS

This session is a presentation from IAALS on research exploring self-represented litigants. Who are they? Are they satisfied with the system, the process, their outcomes? Are they over-stressed? Would they do it again the same way if they had it to do over? What are the opportunities for lawyer involvement with pro se litigants?

Presenters:

Natalie Anne Knowlton, Director of the Honoring Families Initiative, Institute for the Advancement of the American Legal System

Corina D. Gerety, Director of Research, Institute for the Advancement of the American Legal System

Saturday, August 15

8:00 - 8:30 Continental Breakfast

Emerging Delivery Models

8:30 - 10:30 Presentation

The first part of the session looks at unbundled legal services. What are the benefits to the client? To the lawyer? When is it viable and when is it not? What are the barriers and how do we overcome them?

The second part of the session will examine alternative delivery models, including non-profit sliding scale co-pay clinics and community-based practices.

The final part of the session examines the role of technology to facilitate the delivery of personal legal services.
Presenters

Forrest Mosten, Mediator, Limited Scope and Collaborative Attorney and Certified Family Law Specialist

Diana Lopez, López Law Corporation, Santa Ana, CA
Niloufar Khonsari, Executive Director and Immigration Attorney, Pangea Legal Services

Sara Smith, Research and Policy Analyst, American Bar Association

Catherine Sanders Reach, Director, Law Practice Management and Technology, Chicago Bar Association

Richard Granat, President, SmartLegalForms, Inc. and DirectLaw, Inc.

Dan Lear, Director of Industry Relations, Avvo, Inc.

Joshua Lenon, Lawyer in Residence, Clio

Mark O’Brien, Executive Director, Pro Bono Net

10:45 - 11:15 Breakout Sessions

1. What needs to be done to advance unbundled legal services?

2. How can alternative delivery models be identified, advanced and supported?

3. How can lawyers maximize their efficiency through the use of technology and what are the roles of others in the legal community to advance that use?

Discussion Leaders

Forrest Mosten, Mediator, Limited Scope and Collaborative Attorney and Certified Family Law Specialist

Diana Lopez, López Law Corporation, Santa Ana, CA

Catherine Sanders Reach, Director, Law Practice Management and Technology, Chicago Bar Association

Dan Lear, Director of Industry Relations, Avvo, Inc.

Joshua Lenon, Lawyer in Residence, Clio

Mark O’Brien, Executive Director, Pro Bono Net

11:15 - 11:45 Report on Breakout Sessions

11:45 - 12:00 Wrap-up

Applying what we’ve learned and the creation of action steps.