This workshop was held at the 2017 Equal Justice Conference in Pittsburgh, Pennsylvania

Title:
Pro Bono 2.0: Harnessing Tech and CRM to Build Sustainable Pro Bono Programs

Presenters:
Jena C. Gutierrez, Community Legal Aid, Worcester, MA
Barbara L. Siegel, Volunteer Lawyers Project, Boston, MA

In today's environment legal services organizations have to achieve more with fewer resources. We'll explore how statewide online pro bono tools can help resource-strapped programs partner with the broader legal community; we'll also explain how use of CRM software (Constituent Relationship Management) enhances case management, improves outcome reporting and reduces staff time spent on case administration.
Agenda

Saturday, May 6, 2017
8:30 – 10 am

• Making the case for online pro bono support tools
• Basic web design principles
• Identifying potential statewide partners
• Interactive session: How can we apply online support tools to our pro bono programs?
• Overview of CRM and its application to legal services
• Leveraging CRM technology to save staff time through the use of automation and workflows
• CRM technology’s ability to facilitate easier access to and more effective use of data

Presenters:
Jena Gutierrez, Community Legal Aid, Worcester, MA
Barbara Siegel, Volunteer Lawyers Project, Boston, MA
Tom Walsh, Volunteer Lawyers Network, Minneapolis, MN
Tips for Breaking Poverty Barriers to Equal Justice

Below is a list of specific skills and strategies from Donna Beegle, Ph.D., to assist your work throughout the representation of a client living in poverty.¹

1. **Watch for the human tendency to judge what is different or what we don’t understand because judgment prevents connection and communication.**
   Understanding that it’s human to judge when we see differences, be diligent about looking for cues of bias, such as frustration or other internal feelings of discomfort around differences. Unless we see this, we’ll lose our ability to help someone different from us or to act on our values.

2. **To overcome judgment, become curious and seek more information.** While many attorneys have had experiences of “situational” poverty (or see how poverty is misportrayed in the media), many pro bono clients come from “generational,” “working class” or “immigrant” poverty, with very different experiences and skills. Learn about the context of poverty to help understand your client’s decisions, common logistical barriers to participating in legal processes, and ways he might communicate and organize differently. Unless we understand the context, we may make faulty assumptions about motives and be less wholehearted in our efforts.

3. **Build trust.** Be friendly and make sure your body language and nonverbal communication support your words as you start to get to know each other. Build common ground by identifying and sharing some things you might have in common. Do you both have children a certain age, have a pet, enjoy a certain sport? Identifying these will help you both get beyond stereotypes you might have about the other. And personal connection will show your client you’re a real human being who cares about him or her.

4. **Build in a little extra time for meetings.** People in poverty may be late to meetings based on unexpected crises or lack of familiarity with the meeting place. Consider unilaterally giving your client a 15-20 minute grace period, as well as sending reminder emails or texts. It can also support trust and focus to let him know up front how much time you have for the meeting and provide an agenda of what you need to cover.

5. **Determine the specific circumstances of your client’s life that may impact the ability to participate in the legal process.** To identify any logistical barriers, have a checklist of questions to ask, including numerous contact information, job hours, transportation issues, day care, etc. (See sample Attorney Client Understanding.)
6. **In communications, ensure you are understanding your client.** For example:

   a. Use common active listening techniques. Suspend your thoughts about what you are doing to say (jot them down if it would help you remember). Avoid focusing on non-related subjects. Repeat back every so often what you hear to make sure you are understanding correctly and understanding the other’s perspective, explanations and rationale. If a client is sharing information in a way that is more circular than linear, feel free to interrupt after a while to gently guide the conversation back. (The meeting agenda can help too.) But in the meantime, listening to the story can help you identify more ways to build identification with him.

   b. Ask open-ended questions and try to stay away from questions that ask “why,” which can put people on the defense. Instead, use statements such as, “Help me understand,” or “Tell me a little more about...” If a question seems invasive, preface it by letting your client know why you are asking it.

   c. When determining the facts of the case, you might first put your pen down and ask your client to tell you what happened. (This also supports trust.) Next, ask her to repeat the story, while you take notes, Finally, repeat back the story to see if you have understood. (Even your notes were accurate and complete, you may find out additional information in this third step.)

   d. As clarifying questions.

   e. Do not expect people to know what may be obvious to you. Use your expertise to coach and navigate people through the legal process.

7. **Ensure your client is understanding you.** For example:

   a. Use multiple approaches until you are assured of shared meaning.

   b. Use visuals as much as possible (including drawing out next steps).

   c. Make sure your body language supports your verbal communication.

   d. Use stories as a way to explain (“Here is what worked for my client Julie.”).

   e. Summarize every so often.

   f. Ask her to summarize. “I’d like to make sure I’m being clear. Could you tell me what you are understanding the next steps are?”

   g. Use familiar words and examples that laypeople can relate to.

   h. Use a variety of examples to convey difficult points (trying to draw from the context of poverty rather than that of middle class).
i. Minimize the chance of losing your client through legalese, e.g., “I’m used to being around lawyers all day and can sometimes forget how to talk in plain English. If I slip up and use words you’re not sure about, please let me know.” (This phrasing owns our responsibility as the professional to be clear, rather than asking clients to let us know if “they don’t understand.”)

j. Review written communication orally and use a third grade level and clearly organized bullet points and graphs (whether or not your client is literate).

k. Repeat information that is new.

l. Break information into smaller, doable steps.

m. Follow up – poverty is constant crisis.

8. **Customize your services to what the client wants.** One solution does not fit everyone. Make sure you ask for your client’s goal after you have provided your assessment of the case and the available options. Understand that she may not want to pursue legal action. (For example, if it’s going to take five months to get the security deposit back, the case may take a lower priority in her life given other crises going on.)

9. **Be aware of the power differential.** Many pro bono clients feel intimidated or shame around lawyers. Pay attention to ways in which you can make her feel more comfortable (such as sitting at a conference table rather than an imposing desk).

10. **Consider the difference between empowerment and overwhelm.** Clients whose basic needs are not met are not in a position to be empowered. For others, teaching them how to do things for themselves is a deep service. It’s critical to know the difference.

11. **When giving instructions, give context (explain why), break them down into manageable steps, and ask whether the client is able to do them.** Because it’s second nature for us to schedule and keep appointments, keep a calendar, plan for future events, and organize paperwork, it’s hard not to assume that everyone has those skills. However, the skills it takes to succeed in middle class or wealth are quite different from the skills it takes to survive in poverty. Find out whether your client has the ability to follow the instructions, given skills and other things happening in his or her life. If appropriate, offer supports.

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1 These concepts are taken from the *Breaking Poverty Barriers to Equal Justice* © video clips and curriculum. The *Breaking Poverty Barriers to Equal Justice* © materials are free to nonprofit legal services programs nationwide through the generous sponsorship of Lindquist & Vennum LLP, in partnership with Volunteer Lawyers Network, Target Corporation, and Communication Across Barriers. For more information, see: [www.lindquist.com/probono](http://www.lindquist.com/probono) or [wpbc.wikispaces.com/BPBEJ](http://wpbc.wikispaces.com/BPBEJ). Or contact [Delaney.russell@vlmn.org](mailto:Delaney.russell@vlmn.org) or [canderson@lindquist.com](mailto:canderson@lindquist.com). Reprinted with permission.
Harnessing Tech to Build Sustainable Pro Bono Programs

2017 ABA/NLADA Equal Justice Conference

Barbara Siegel, Volunteer Lawyers Project, Boston, MA
Jena Gutierrez, Community Legal Aid, Worcester, MA
OBJECTIVES

- Identify at least five potential reasons for creating online pro bono support tools
- Explore three existing pro bono support tools
- Review five basic web design principles
- Identify potential statewide partners
- Brainstorm application of tools to your pro bono programs
POLL: HOW MANY OF YOU ARE CURRENTLY USING ONLINE TOOLS TO SUPPORT YOUR PRO BONO PROGRAMS?
Poll: For which purposes are you using online tools?

A. Recruitment
B. Group communication
C. Training
D. Recognition
E. Case management (referrals or placement)
USING TECH TOOLS FOR RECRUITMENT, REGISTRATION, AND TRAINING
USING TECH TOOLS FOR RECRUITMENT, REGISTRATION, AND TRAINING
USING TECH TOOLS FOR [RECRUITMENT/REGISTRATION/RECOGNITION/CASE MANAGEMENT/TRAINING]
 USING TECH TOOLS FOR [RECRUITMENT/REGISTRATION/RECOGNITION/CASE MANAGEMENT/TRAINING]
USING TECH TOOLS FOR REGISTRATION
USING TECH TOOLS FOR TRAINING
Poll: Are your tools collaborative?

A. Yes, we partner with all major stakeholders
B. Yes, but we would like to increase our number of partners
C. No
GRAB YOUR PARTNERS!

Pro Bono Support Tool

Law firms

Law Schools/Clinics

Bar Associations

Access to Justice Commissions

Pro Bono Associations

Statewide Technical Assistance Partner

Corporate Legal Departments

Legal Services Agencies
Connect to existing resources
SPREAD THE WORD
PROCESS OVERVIEW: WHERE DO I BEGIN?

1. Define goals
2. Assess your existing resources
3. Benchmark additional tools
Process overview: next steps

1. Provide/attend tech trainings as needed
2. Build or modify tool
3. Connect to existing resources
PROCESS OVERVIEW: FINE TUNE

Test  Adjust  Maintain
BEGINNING PROGRAMMING
ALL-IN-ONE DESK REFERENCE FOR DUMMIES
7 IN 1
Wallace Wang
Welcome to probono.net!

This site provides resources for pro bono and legal services attorneys and others working to assist low income or disadvantaged clients. Please join our community and start making a difference today!

Pro Bono Net News

Pro Bono Net is pleased to announce the launch of a new website, www.vetsprobono.org, in collaboration with the Veterans Consortium Pro Bono Program.
WEB DESIGN PRINCIPLES 101

- Mobile first.
- Easy navigation.
- Highlight most important content.
- Test with real people and watch them.
- It’s all about the user experience (UX).

Photo credit: techtic.com
NEW MOBILE-FIRST DESIGN

Community Legal Aid Medical Legal-Partnership

Welcome to Community Legal Aid’s Medical-Legal Partnership - Advocacy for a Healthy Community

Community Legal Aid
Partners for justice, for all.

UMassMemorial Health Care

According to the National Center for Medical-Legal Partnership, there are currently 50,000,000 Americans who face health-harming legal needs which disproportionately affect low-income families, children, the elderly, and people of color.

Through a Legal Services Corporation (LSC) Pro Bono Innovation Fund Grant, Community Legal Aid and UMass Memorial Health Care have joined to improve the health of low-income families in Central Massachusetts by tackling these unmet health-harming legal needs faced by the system’s most vulnerable patients. Your pro bono assistance will enable these families to gain access to stable and affordable housing, education, public benefits, affordable health coverage, and guardianships. Thank you for joining us in our efforts to provide low-income individuals access to justice. We are pleased to welcome you to this Medical-Legal Partnership project and look forward to working with you.
About Medical-Legal Partnership

Learn about the exciting partnership between Community Legal Aid, UMass Memorial Health Care, and pro bono attorneys like you.

Register Here

Complete a brief registration form and a pro bono coordinator will contact you to get started!

MLP Calendar

Check out our calendar for trainings and other Medical-Legal Partnership events.

Why Volunteer?

Learn about some of the ways attorneys can positively impact the health of low-income families in Central Massachusetts. Discover resources we offer to support your pro bono work.

Library

Access our substantive training materials and volunteer toolkit as a registered pro bono attorney.

Email Groups

Registered MLP volunteers can join the Community Legal Aid Medical-Legal Partnership email group to receive advice and important project updates. Just click the Subscribe link for that group.

In the News

"Community Legal Aid partners with UMass Memorial with a new grant from LSC"


"Medical-legal collaboration gets $200,000 grant," Worcester Business Journal Online.
According to the National Center for Medical-Legal Partnership, there are currently 50,000,000 Americans who face health-harming legal needs which disproportionately affect low-income families, children, the elderly, and people of color.

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Yours in Service,
The Medical-Legal Partnership Team
Community Legal Aid Medical Legal-Partnership

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Yours in Service,
Other ProBono.net Tools

- Post Cases
- Post Short-Term Projects
- Checklists & Guides for Volunteers
- Targeted Emails
- Featured Volunteers
- Volunteer Toolkits
**THINK/PAIR/SHARE ACTIVITY**

- What new ideas has this workshop sparked that you can bring back to the office?
- How can you establish or increase partnership with stakeholders in your state?
- Do you foresee any challenges? Can you devise any possible solutions?
- What resources do you need to make online tools realistic for your program?
QUESTIONS AND SUGGESTIONS
CONTACT

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- Barbara Siegel, bsiegel@vlpnet.org
Using Customer Relationship Management in a Legal Services Setting

2017 EQUAL JUSTICE CONFERENCE
TOM WALSH – VOLUNTEER LAWYERS NETWORK

Learning Objectives

- Understand what CRM is and its application to legal services
- How to leverage CRM technology to save staff time through the use of automation and workflows
- How CRM technology allows for easier access and more effective use of data

About Me
My IT Background

What is CRM?

- **Customer relationship management (CRM)** is an approach to managing a company's interaction with current and potential future customers. It helps to analyze data about customers better with a company and to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.

- At its simplest, a CRM system allows businesses to manage business relationships and the data and information associated with them.

Examples of CRM

- Salesforce
- Clio
- LegalServer
- Microsoft Dynamics
- Oracle CRM
A CRM Case Study - VLN

- About VLN
  - ~8,000 legal services/year (advice, brief service & extended rep)
  - General civil legal service provider
  - ~900 – 1,000 volunteers/year
  - 20 Staff (no on-site IT staff)
  - Mixed funding sources (state, foundations, law firms, United Way, individuals and events)
  - 20+ years of client and attorney records

Pain Points
- Multiple tools requiring data entry into multiple systems
- Contacts with Overlapping Roles
- Volunteers
- Donors
- Clients
- Community Partners
- Board Members
- Cumbersome data tracking and analysis
- Limited flexibility
A CRM Case Study - VLN

Leveraging CRM
- Customized Views for Case Coordinators
- Real Time Data & Dashboards
- Automated Emails
- Tracking Staff Communication with Clients and Attorneys
- Reports and Queries

The Good, The Bad and the Ugly
A CRM Case Study - VLN

Pros
- Flexible
- Accessibility of data
- Remotely accessible
- Customization
- Integration with other software/services

Cons
- Very time intensive to plan & implement
- Steep learning curve
- Mileage varies for different users
- Requires internal or external support
- Data security

Future Projects
- Client Portal
- Text Integration
- Integration with Phone System
- Secure Data Sharing
- Automated Paneling

Questions???
Contact Information

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