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March 28, 2012

Mytrang Nguyen, Program Counsel
Office of Program Performance
Legal Services Corporation
3333 K Street, NW
Washington, D.C. 20007

Dear Mytrang:

Thank you again for your Program Quality Visit to Atlanta Legal Aid. As I have told you, second only to the Premiere of our documentary "One Law for All", your visit and findings were the highpoint of 2011 for the program. I could tell throughout the visit, and particularly at the exit interview, that your team saw the special nature of our program. Your report confirms that. I certainly plan to talk about your conclusions to our friends, to demonstrate the quality of the program they support, and to those who do not know us, to demonstrate why they should become our supporters.

I have attached our comments to the report. There are a number of minor inaccuracies. (Given its length and detail, I am impressed that there were so few.)

There were two changes we recommend that deserve some comment. First on page 16, your last recommendation indicates that we should develop procedures to effectuate our goal to have a diverse attorney staff "that reflects the client community served." It is not our goal to have our attorney staff match our client community's diversity in a mathematical way. Given the nature of Atlanta's population, that would not be realistic; it might not even be legal. It is our goal to have a diverse attorney staff consistent with our core value of providing high quality representation for our clients. While adding the phrase "that reflects the client community served", may not misstate our goal, it is at best ambiguous and should be deleted.

The second comment relates to the section on the final page describing our relationship with GLSP. I think it understates the ongoing relationships the programs have, particularly on joint litigation and advocacy on statewide issues. I also wanted to underscore our program's continuing interest and offers to do joint training. The language we have suggested, we believe is more accurate.

Finally, I wanted to again confirm that we are on the LSC schedule for reapplication in August of this year, assuming of course that no other organization sends in a competing Notice of Intent to apply for our grant.

Thank you again for the quality of your visit and for the thoroughness of your report.

Sincerely,



Steve Gottlieb
Executive Director

**Atlanta Legal Aid Society
Program Quality Visit Report**

Suggested changes are marked on the attached pages, with two more in depth suggestions below.

Page 25:

- I. Suggested replacement for the marked sentence:
In connection with the LSC visit, for example, the program was able to show how community advocacy work to correct a faulty utility allowance formula will result in \$9 million in additional food stamp benefits annually for Georgia residents.

Page 26:

- II. Suggested replacement/revisions for the marked section:
ALAS and GLSP, the other LSC grantee in the state, collaborate significantly. The programs frequently make referrals, and programs such as the Health Law Partnership and the Georgia Senior Legal Hotline that serve the entire state are especially active in that practice. The programs have also been working together for several years on two statewide complaints regarding the access of individuals with Limited English Proficiency to Medicaid and Food Stamp benefits. While the two programs no longer co-host the annual Legal Services University due to GLSP's budget constraints, ALAS continues to invite attorneys from GLSP's Piedmont and Gainesville offices (as well as attorneys from other smaller non-LSC programs) to attend at no charge. Some GLSP lawyers have, in fact, attended each year since GLSP stopped co-hosting the event.

office/project's weekly case acceptance meeting.

Fulton County 1
In addition to their regular intake system, the program operates a housing hotline as part of its general law unit intake and a senior hotline for the State of Georgia. The senior hotline operates a call-back system that is staffed by staff and a group of law firm pro bono receptionists who access the phone system remotely, pull messages, and enter them into a queue that is visible to the senior hotline staff in their offices and where they return calls. The hotline volunteers noted that the system calls averages 50 - 60 retrieved call messages a day.

Finding 4. ALAS dedicates a portion of most attorneys' time to intake responsibilities.

By design, nearly all ALAS attorneys share rotating responsibility for intake. During staff interviews, it appeared to the team that this stemmed from a longstanding practice and belief that intake is an important ongoing job responsibility for all attorneys, regardless of experience, which allows them to maintain their skills and ability to problem solve and issue spot. It also appeared that the program's emphasis on assisting with clients' "everyday legal problems" drives some of the emphasis on dedicating attorney-time to intake responsibilities. Several staff suggested that advocate staff time could be saved by employing well-trained interns and administrative professionals to handle some follow-up interviews with applicants. They would like to see an advice helpline for the program, which would allow for more attorney time to handle cases.

Finding 5. ALAS is seeking to improve its intake functioning with the unification of its phone system which will allow for a more seamless client experience. This effort has been funded by an LSC Technology Initiative Grant and is slated for implementation in 2012.

This year, LSC has awarded ALAS with TIG funding to unify and streamline telephone services to clients, particularly at the initial point-of-entry. The unification of ALAS' phone system will allow for the possibility of coordinated intake, even though intake staff may remain decentralized in local offices. Basic improvements that will benefit intake staff, such as the ability to by-pass the main intake line to contact staff in other offices, the capacity to make inter-office call transfers, call forwarding, and conference calling also has the potential to decrease client frustration, drop-offs, and confusion which staff reported can occur at the time of the initial call. This issue was also noted in ALAS' TIG application. The telephone improvements will allow all five main offices to function as one unified office, improving efficiency and customer service at a reduced expense to the program.

In ALAS' TIG grant application, the program noted that it will likely implement coordinated intake with its projects that have staff in multiple locations and will particularly benefit from the efficiencies created by the new phone system. The program plans to pilot this approach in the Hispanic Outreach Project, which currently has a dedicated intake line staffed by a bi-lingual paralegal. The paralegal does not have the ability to immediately transfer calls to the project staff located in multiple offices. ALAS plans to develop a model for doing so and in the process it will streamline intake, case handling, and workflow for Hispanic Outreach Project applicants, clients and staff.

personal care homes

health facilities, ALAS staff have a special sensitivity to the unique needs of these populations. Through the establishment of its senior citizens law project and the statewide senior citizens hotline, the program is attuned to and coordinated in addressing the needs of the elder population in the state. Under the Ombudsman program, ALAS staff are certified to investigate and make monthly unannounced visits to nursing homes and ~~independent living centers~~ in the 10-county metropolitan Atlanta area. The staff of the Ombudsman program provides a bridge for clients in these residential facilities to access basic ALAS services as well as the expertise of its disability rights advocacy and senior citizens law project.

The program appears to make effective use of Language Line and Ethnic Bridge for telephone interpretation, as needed. ALAS obtained funding to promote a project for staff members to receive paid leave and to cover costs for Spanish language classes or language immersion programs abroad. Participating staff are fully expected to use their Spanish skills in the course of their work at ALAS. Since 1996, ALAS staff have engaged in planned, targeted outreach to the large Hispanic population in its service area. Staff of the Hispanic Outreach Project provides regular, scheduled outreach at the Latin American Association on issues related to VAWA advocacy. As a result of this longstanding and formal relationship, ALAS is also able to assist Spanish-speaking clients with other issues such as family law, housing, and consumer matters. The director of the Latin American Association noted that ALAS is a "strong and zealous" advocate for their client population and he receives no complaints or concerns about the program's services, an important credibility issue for immigrant populations who face both language and cultural barriers to services and accessing the legal system. Currently, an ALAS staff member is developing connections with the growing Muslim population in ALAS' service area. The program has hired a staff attorney who speaks Hindi and ALAS staff is engaged in outreach to Somali, Ethiopian and other African immigrants, as well as the growing Arab immigrant population.

Access and utilization by the low-income population

Finding 7. ALAS staff, offices, and projects are accessible to their client population. ALAS has been working to address the need for updated downtown office space and client population growth in the suburbs within given current budget constraints.

In addition to the outreach activities of staff, ALAS office locations appeared to be accessible to the low-income population in the service area and, with the exception of the Gwinnett County office, are accessible to public transportation. The Marietta office is located on the town square, easily accessible by public transportation and near the local courts. ALAS' HeLP offices are co-located in hospitals or are housed in nearby offices, making it easy for patients to meet with ALAS staff. The Decatur office is well-located in a triangle of support services for people with mental health conditions and is fairly close to the MARTA station as is the Southside office.

At the time of our visit, space considerations for the ALAS' downtown office were significant. The executive director and board members were conducting a review of the real estate holdings of ALAS. The building which houses ALAS's downtown office at 151 Spring Street NW is in need of extensive renovation. Currently, the structure does not meet building codes in several areas. The technology infrastructure is outdated and inhibits the installation of updated

technology. The program had been planning to renovate its downtown office by ~~securing subsidized loans~~ ^{raising funds} to completely refurbish the office and to further centralize its statewide and administrative staff (currently housed in various locations). Over the past year, however, a committee of ALAS' board and management has dedicated considerable time to assessing the financial and practical feasibility of purchasing a recently renovated historic building which housed the Salvation Army, Atlanta's downtown mission, and other charitable organizations. At the time the visit concluded, the program was in negotiations with the seller of the building. Throughout their discussions about the pressing need for new downtown office space, the program's management team and board conveyed an awareness of the opportunities and challenges in the ongoing economic environment, the growth and location of client populations in their service area, and cost considerations.

PERFORMANCE AREA THREE. EFFECTIVENESS OF LEGAL REPRESENTATION AND OTHER PROGRAM ACTIVITIES INTENDED TO BENEFIT THE LOW-INCOME POPULATION IN THE SERVICE AREA.

Legal representation

Finding 8. ALAS engages in high-quality representation and has built a strong reputation in the legal community. The program fully maximizes the use of its resources to attain the best possible results for individual clients and other low-income people who may face similar legal problems.

ALAS' legal work and representation was highly regarded by many external stakeholders interviewed as part of the program quality visit. Several judges noted that ALAS attorneys are consistently well-prepared, professional, and attuned to their clients' best interests. Some judges also pointed out that ALAS attorneys are particularly good at negotiating settlements because of their understanding of the law and what is realistically achievable and enforceable. Private attorneys interviewed also observed and personally expressed the view held by courts and opposing counsel that "if Legal Aid is taking the case, it must have merit," again an indication of the program's strong and positive reputation for quality.

On a per capita basis for low-income people, LSC's data shows ALAS closes over double the national average of cases annually. According to reports provided to LSC, 91.8% of the cases closed by ALAS in 2010 were limited service cases and 8.2% extended service, compared with the 2010 national average for LSC grantees of 78.3% limited service and 21.7% extended service cases. Despite ALAS' lower than average percentage of extended representation cases and because of its very high volume of cases, ALAS closes approximately 77% of the national median for extended service cases per 10,000 low-income persons. During the visit, ALAS's senior management expressed an interest in looking at the balance of extended representation compared to limited service work and this discussion should be encouraged at the program.

ALAS' prominence appears to be built on its long history providing services in the Atlanta legal community, its high volume of individual service work, and the depth of expertise and dedication of its advocates. With experienced managing attorneys, an advocacy director, and a general counsel, ALAS also devotes significant resources to developing and encouraging staff to

- In the past year, ALAS also established state and national precedent in three separate and important mortgage foreclosure cases. The first case created assignee liability under the Georgia Fair Lending Act. The second case was the first-ever to apply agency principles to the Truth in Lending Act's holder identification requirement. In the third case, the program obtained a court ruling that recognizes a private right of action for borrowers under the Georgia Residential Mortgage Act. This ruling was obtained in 2011 after the Home Defense team filed claims and briefs in dozens of cases since 2008, including an amicus brief to the Georgia Supreme Court seeking clarification on the Act.

Mental health disability advocacy and Disability Rights Project

- The ALAS Mental Health Unit has an equally rich history of advocacy, filing a lawsuit in 1995 on behalf of two clients in Georgia's state psychiatric hospital who were seeking disability services in the community. The case resulted in the landmark U.S. Supreme Court case, *Olmstead v. L.C. and E.W.*, 527 U.S. 581 (1999), which found that unjustified institutional isolation of people with disabilities is unlawful discrimination under the American with Disabilities Act and establishing a community integration mandate for people with disabilities. ALAS is now involved in significant Americans with Disabilities Act litigation in federal court for enforcement of the *Olmstead* decision for six mentally disabled individuals whose community placements are being terminated and who were *at risk* of being institutionalized. The Department of Justice has intervened, supporting ALAS' clients position and an extension of the holding in *Olmstead*.
- The Mental Health Unit also advised the Justice Department in a 2008 case, *United States of America vs. The State of Georgia*, where the U.S. filed suit against the state for its treatment of residents in mental health institutions after a series of newspaper articles in the Atlanta Journal Constitution. An initial settlement agreement was focused solely on institutional practices without recognizing the interrelated issue of improving institutional conditions by making community placements for the large number of people who should be in them. ALAS joined as amici in the case with mental health advocates who objected to the settlement. The District Court agreed with ALAS and the mental health advocates and required the Justice Department to negotiate with them in the case. The final 2010 settlement between the Justice Department and the State of Georgia included a provision to provide housing for 2,000 individuals with severe mental illness, incorporating a key element of an ALAS-designed plan for the state. ALAS was extensively involved in this settlement and plans to remain involved in monitoring the implementation of the settlement and *Olmstead* as it impacts ALAS clients.

Setting precedent in family law

- In ALAS' largest area of practice which is family law, the program has tracked that it protected over 1,400 adults and children against domestic violence and obtained nearly \$3 million in annual support, largely for clients' children in 2009 and 2010.
- In the same two year period, ALAS was successful in two family law cases in the Georgia Supreme Court and the Georgia Court of Appeals. The first case established protections for parents' rights in temporary guardianship terminations, an important issue for many ALAS clients who place their children in temporary guardianship during times of family crisis or extreme hardship. The second case established child support as a separately enforceable judgment from an expired domestic violence protective order.

change
as
above

This case also has important practical and public policy value, as studies have shown that domestic violence survivors frequently return to their abusers for financial reasons.

Finding 9. ALAS places a very high priority on the selection, development, and retention of quality staff. Over time, it has built a strong capacity to carry out its work effectively with a skilled, highly motivated, and cohesive staff.

The program and its leadership place a high value on its personnel: fully leveraging staff experience, skill, and potential to further organizational and client interests. ALAS staff often come to the program with experience which has practical use and “fit” in their current role. A number of staff worked at other legal aid organizations or were previously employed at ALAS. The Team Child Director was previously a fellow at ALAS and in private practice at a boutique firm that specialized in education advocacy before returning to the program. ALAS’ paralegal in the General Law Unit was an intern at the program and used to be employed in the Medicaid unit of the state Department of Children and Families. A number of ALAS attorneys also have other degrees, such as MSWs or RNs. Overall ALAS’ staffing strategy appears to value people who have prior experience with the program or who bring additional complementary experience, relationships, and perspectives to their jobs.

A defining element of ALAS’ approach to staff development is to employ formal and informal methods that allow for highly customized attention to the individual staff member and his or her interests and strengths. According to the executive director, the program expects every staff person to “lead” in his or her own way, and as a result ALAS takes a broad view of “leadership.” Management prides itself in matching attorneys with client need and individual areas of interest to create a well-rounded legal and advocacy capacity as a whole. Over many years, ALAS’ attention to staff development and leadership appears to have been effective in engaging and retaining a skilled, highly motivated, and very cohesive staff. Staff are also supported if they seek to fulfill their professional goals outside of the program if that is where the best opportunities exist for the individual.

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like
p. 10*

The longtime attorneys who “founded” ALAS’ Home Defense Program, HeLP project, and Mental Health Unit were all given the freedom to develop expertise in their areas of interest and passion over time. In one ALAS county office, a family law attorney has developed a zeal for doggedly “finding the money,” for low-income clients who are seeking support for themselves and their children. Her remarkable ability to locate and analyze assets was the basis for her promotion within the program through the Attorney II program (discussed more fully below) and she is now the program’s expert on asset identification and analysis and is available for consultations with any ALAS staff member and a resource to the whole program and its clients. ALAS also employs myriad more formal staff development and retention strategies. Three examples are worthy of mention in this report because they are innovative and also focus on building and strengthening the program’s capacity for effective legal representation:

Attorney II Program

- ALAS has long employed an Attorney II program which is designed as a leadership development and retention program. Attorneys who have been employed at ALAS for five years are eligible to apply for the Attorney II designation which carries a base salary

increase and additional responsibilities such as supervising paralegals, directing a project, conducting outreach to new communities or, as in the example noted above, developing specialized expertise to serve as a resource for advocates and clients. According to the executive director, he has taken great pains over the years to avoid creating an Attorney II program that rewards or values litigation and systemic impact work over other kinds of services and legal assistance for clients.

- The Attorney II process was described by staff and management as one that is thoughtful and comprehensive. Eligible attorneys work closely with their supervisor over the course of a year to develop an Attorney II application which aligns the attorney's areas of interest, professional and leadership development goals, and client need. When the final Attorney II application is made, ALAS' key management staff including the deputy director, advocacy director, and executive director have all provided input, support, and perspective on the overall direction of the attorney's plan. The experience was one that appeared affirming and encouraging for the Attorney II staff and is now considered a "rite of passage" for all newer attorneys at ALAS.
- It is important to note that outside of the Attorney II process, staff in ALAS encourage each other to continuously leverage internal resources to better serve or improve access for clients. One staff attorney, an expert on unemployment insurance, recently conducted a program-wide unemployment training for paralegals to share her expertise in a substantive area where the program has experienced an upsurge in intake, given the economic downturn. Another staff attorney, who convenes and chairs ALAS' Hispanic Outreach Project, has been asked by the executive director to participate in a state court committee seeking to address access issues for immigrants. The executive director and other staff recognize that the program needs to develop appropriate means to provide sustained support and follow-up with staff who have been awarded the Attorney II designation, and noted their interest in systems to assure that Attorneys II are successfully fulfilling their additional responsibilities and to assist with professional development in later years

Legal Writing Program

- ALAS recently implemented a unique and formal legal writing program for their attorneys by leveraging the legal writing expertise of its general counsel, an experienced appellate attorney. Beginning last year, ALAS staff attorneys with 1 to 3 years of experience each have a legal writing sample reviewed by the general counsel for discussion and detailed feedback. Next year, attorneys with approximately 4 to 8 years of experience will participate in the program and additional attorneys the following year until all ALAS legal writing has been formally reviewed through the writing program. The general counsel is also available to staff at any time to review written legal work, and many attorneys frequently take advantage of this opportunity. According to one attorney who had a document reviewed recently, "It was wonderful. He wrote very extensive and thoughtful comments and feedback on my writing, almost as long as the brief itself."

Spanish Immersion Program

- The program has sought to improve its capacity to serve the now-sizeable Spanish speaking population in the service area since 1996, when it created its Hispanic Outreach Project. Two years ago, ALAS applied for and received a ~~\$750,000~~, three year grant

cover their
own travel
expenses, and

from the Goizueta Foundation to hire full-time Spanish speaking paralegals and intake staff in each office and to pay for other staff members to acquire or improve their Spanish fluency through language classes and immersion programs. Staff members may now apply for the Spanish Immersion Program, justifying their application based on the nature of their work, client demographics, and the existing staff language capacity in their office or project. Once approved for the program, staff members receive paid leave and covered costs for language classes or language immersion programs abroad, and are fully expected to use their Spanish in the course of their work at ALAS. According to ALAS management interviewed during the visit, the effort has increased their staff's ability to effectively work with the Spanish speaking client population and is viewed as a valuable employee benefit.

(limit
up to a maximum)

When ALAS advocates have cases which involve significant litigation, they describe strong collaboration within the program, receiving support from their immediate supervisors and, attorneys with relevant substantive expertise, as well as from the director of advocacy and general counsel. The director of advocacy and general counsel are both experienced attorneys and, together, they serve as an important resource for ALAS' legal work and strategy. The director of advocacy also organizes the Legal Services University training for all advocates each year and, in prior years collaborated closely with the Georgia Legal Services Program to host joint trainings. Along with the general counsel, he ensures staff have access to appropriate legal resources. During interviews, many staff, including very experienced attorneys, noted how they readily call upon the advocacy director to discuss their challenging or complex cases and to gain insight on all aspects of procedure and strategy. ALAS' general counsel also serves as a backup to the advocacy director and a resource to ALAS attorneys on complex cases or substantive issues, reviews written work, and assists with oral argument and challenging research questions.

The program also recently created the position of "practice innovation manager" and the attorney in the position is responsible for developing the program's technology to improve legal advocacy to clients. A number of staff interviewed during the visit felt that technology could strengthen the program's efficiency and service delivery, and were enthusiastic about the new position, particularly as it relates to LSC's recent TIG grants to the program which will help ALAS' upgrade the phone system across all offices and improve their internal document management and information sharing.

Finding 10. The program takes a flexible approach to supervision and management structures. With regard to legal work supervision, managers are expected to provide significant supervision for newer advocates and have discretion with regard to the supervision of more experienced staff.

The program has historically approached key aspects of its delivery system and operations by affording a significant amount of flexibility to managers and supervisors. Consistent with this approach, the program's written policy on legal work supervision emphasizes close supervision of newer attorneys and paralegals, and affords supervisors with significant discretion with regard to the supervision of mid-level and senior attorneys and paralegals. An excerpt from ALAS' current supervision policy, dated November 1995, provides a good example of the program's somewhat permissive approach to supervision:

Indent Quoted Section for clarity?

Mid-Level Attorneys and Paralegals: Mid-level attorneys and paralegals are defined as attorneys or paralegals who have two to eight years of experience at ALAS. These staff should continue to have a formal supervisor. As with new staff, the unit manager is responsible for assigning a supervisor to the mid-level attorney or paralegal. The nature and amount of supervision will obviously vary depending on the needs and experience of the supervisee. Accordingly, the supervisor has considerable discretion in determining precisely what supervision will be provided.

Although the supervisor has a great deal of discretion, the supervisor should make a deliberative judgment. The supervisee should not be required or allowed to drift. In exercising the necessary discretion, the supervisor should consider the following factors (which are not meant to be exclusive):

1. the supervisee's years of experience;
2. the supervisee's work experience;
3. the supervisee's accomplishments;
4. the supervisee's shortcomings
5. the supervisee's individual needs;
6. the supervisor's needs (e.g. be in a position to do an annual performance evaluation).

Application of the above factors may result in a different level of supervision for different supervisees. Application of the above factors may also result in different levels of supervision for the same supervisee for different tasks. Thus, the nature and amount of supervision must be tailored to the individual supervisee and the individual task at hand.

Similarly, the program approaches management structures and roles loosely, with staff given the latitude to design what makes sense for the project or office. Consistent with this flexible approach to supervision and management structure, the team found that each ALAS office and project, as with intake, functioned differently. While staff in every office participates in weekly case acceptance meetings, each office handles the formal and administrative aspects of staff supervision differently. One branch office is run by two attorneys who are co-managers. In a project, a managing attorney conducts quarterly meetings with each case handler to review open cases. In another office, a manager described the supervision and feedback approach as informal, "dropping in the office," with occasional reviews. Another supervisor in a different office says, "the door is always open," and does not use formal evaluations. A different manager provides staff members with more hands-on supervision, a "constant review of cases," including caseload management and regular, formal evaluations using a written evaluation tool. Several of ALAS' more experienced attorneys have set up peer-to-peer support, as described in the written supervision policy for veteran staff members. On the whole, the staff in these and other offices appeared satisfied with the level of support they received from their supervisors and were unaware of the diversity of approaches.

Supervision standards: While this flexible approach to supervision appeared to be working at ALAS, it is one that works best with supervising attorneys who already possess good judgment or enough hands-on experience to exercise supervisory discretion comfortably and appropriately. It also works best when a good portion of each supervisor's job is spent paying attention to their new and mid-level staff member's development. In some instances this was true, with at least

would provide an opportunity for goal setting or plans that support the development of skills and interests of every staff person as they evolve over a career.

Recruitment: The program's recruitment approach, as mentioned earlier in this report, values candidates with experience at the program or with other complementary work experience. The program has also employed myriad strategies for diversity recruitment including working with students of color organizations and having a presence at minority job fairs and bar associations to better reflect the diverse community it serves. According to staffing forms provided annually to LSC, 20% of ALAS' attorneys are minority attorneys, and the program has sought in the past to recruit bilingual and bicultural attorneys to serve its large Spanish-speaking and immigrant population with limited success. The program's management and board members recognize that ALAS staff salaries are low for an urban program and they recognize that this has impacted their ability to recruit and retain a diverse staff in the near and long term.

Recommendation III.1.10.1* *The program should continue its efforts to train and develop its staff and update its policies and training to reflect effective practices for legal work management, supervision, recruitment, hiring, and retention. This can include consideration of the following:*

- *Program-wide best practices for legal work management including regular review of caseloads and case closings;*
- *An ALAS supervision plan that reflects clearer management roles and expectations;*
- *Shared job descriptions and clearer lines of authority for senior management (deputy director, advocacy director) and supervisors, particularly as it relates to the supervision of veteran managers and staff;*
- *Formal evaluation tools for all staff with clearly defined core competencies;*
- *Ongoing processes for the professional development of Attorney II staff, veteran attorneys, and non-attorney staff;*
- *Short and long term strategies for achieving ALAS' staff salary comparability given budget constraints;*
- *Recruitment procedures that reflect best practices and consistency with ALAS' strategic goals including its desire to have a diverse attorney staff that reflects the client community served.*

In connection with the follow-up to this report, LSC is available to provide assistance on identifying appropriate and useful examples of policies in other sectors or legal aid programs.

Private Attorney Involvement

Finding 11. *ALAS has made a longtime investment in cultivating the private bar resources and it fully leverages pro bono resources to serve clients in effective and pioneering ways.*

ALAS has a long, rich history of private attorney involvement and an extraordinarily close working relationship with the Atlanta bar. The program has created an extensive number of pro bono opportunities that fit the skills and schedules of private attorneys throughout its service area, including retired attorneys and judges. This allows their volunteers to be easily involved in representing ALAS clients. Over time, this has created a culture in the program where pro bono

volunteers and resources are valued and have been fully integrated into how advocates deliver services and how ALAS establishes and expands its projects.

The program places a significant investment in constantly cultivating and working with pro bono resources. Currently, over twenty of ALAS' staff attorneys have responsibility for supervising or working with pro bono attorneys in five counties and with most of Atlanta's largest law firms. The staff members who oversee pro bono in their work, office, or projects, meet quarterly to discuss local issues, share effective practices, and review common, program-wide topics which would improve their work, such as investments in technology. The close working relationship which ALAS attorneys have with each of their pro bono volunteers and law firm pro bono coordinators appears to allow for strong protocols and support in the administration and oversight of pro bono cases. As mentioned in other parts of this report, it will be greatly enhanced in the future by ALAS' technology investments.

The program's pro bono volunteers and fellows reported feeling valued, "like part of the program and team," and ALAS staff described how they "love" having pro bono volunteers, taking pride in the fact that "our volunteers keep coming back" because of their positive experience. Other ALAS staff commented to the team that they simply could not do their work or projects without pro bono volunteers and support. Of ALAS' myriad pro bono efforts, the following are a few of the program's most notable and significant:

Saturday Attorney Program

- The program has a complementary relationship with the Atlanta Volunteer Lawyers Foundation (AVLF), which it helped to found over 40 years ago, and continues to support with ALAS staff supervisors and referrals for the Saturday Attorney Program. The Saturday Attorney Program itself was also founded by ALAS in 1968 and continues to operate as a regular Saturday clinic where private attorneys meet with and provide brief and extended service to pre-screened clients from ALAS and from AVLF. According to AVLF, 82% of the cases at Saturday Attorney Program result in full representation by the participating volunteer. ALAS provides the space on the weekend and the greatest number of prescreened cases are from ALAS whose staff are also onsite to provide backup and supervision.
- The Saturday Attorney Program was described by ALAS board members and private attorneys as an extremely valuable and it appears that almost all members of ALAS advisory board or board of directors were introduced to ALAS through the Saturday Attorney program.

Law firm partnerships and signature projects:

- ALAS has developed a number of law firm-affiliated signature projects and partnerships which have enhanced their work for clients. The Grandparents Project, supported by a former board president with experience in the area of adoptions, includes attorneys from the entire intellectual property section of a major firm. Another large firm in Atlanta has a project with ALAS which is focused on evictions, assigning one of their attorneys each week to take all eviction cases referred by the program. One major Atlanta firm, with longtime ties to the program, assisted with the *Olmstead* Supreme Court litigation, and another firm, along with the Georgia Association of Black Women Attorneys, supports

ALAS' AIDS and Cancer Legal Initiatives by handling wills and estates, ~~and creating~~ Qualifying Income Trusts which protect individuals' Medicaid eligibility.

The same firm does

Fellowship program

for persons in nursing homes,

- The program's fellowship program allows attorneys from private firms to work full time in an ALAS office for four to six months, and has been a particularly effective means of engaging the private bar and reaching more clients. Former fellows interviewed for the visit noted the courtroom and trial experience they acquired during the fellowship under the close and helpful supervision of ALAS attorneys. The program has hosted approximately 50 law firm fellows from 19 law firms, to date, and was the first legal aid program in the country to host a full-time fellow from a corporate legal department.
- In addition and also notably, when the former Governor of Georgia, Roy Barnes, left office in 2003, he joined full-time as a fellow in ALAS' downtown office, focusing on seniors and consumer law given his background as a plaintiff-side consumer attorney. Mr. Barnes continues to take pro bono cases from ALAS' Marietta office in Cobb County where his current law office is located and, as a private attorney who handles class action cases, he also supports the program by staying alert to possible cy prés awards.

Non-attorney volunteers

- ALAS is one of several legal aid organizations nationally that effectively engages law firm administrative staff in their pro bono efforts. As mentioned earlier in this report, one major Atlanta firm has partnered with ALAS to make very effective use of staff volunteers for ALAS' Senior Hotline. Every day, three times a day from early morning until 3:30 p.m., three pro bono receptionists from the law firm ("the Hotline Gang") access the Senior Hotline message system from their desks and enter caller and callback information into the ALAS' hotline database for program staff attorneys to review and return calls. As mentioned earlier, these volunteers enter information for 50 - 60 calls a day and some days handle up to 80 calls, saving ALAS hotline attorneys from a significant administrative burden.
- A paralegal team from the same firm works at the Wellness Center to help ALAS' clients with cancer prepare their wills. Paralegals from other firms also regularly provide pro bono assistance along with undergraduate students and law students from local and out-of-state universities and colleges, and volunteers from the Association of Legal Assistants and a local paralegal certificate program.

Northside Cancer Support Community of Atlanta

Pro bono in county offices

- In addition to the Atlanta Bar Association, ALAS has a close working relationship with the county bars in the suburban counties. As mentioned in this section, pro bono work is very well staffed at ALAS. The Gwinnett office has a staff attorney ~~who works four days a week~~, focusing on overseeing pro bono cases out of the Gwinnett County Bar Association with the assistance of a ~~full-time~~, non-attorney pro bono staff coordinator. The Southside office has a non-licensed attorney serving as ALAS' pro bono coordinator and she works three days a week out of the Clayton County Community Services Authority.

YWCA

In Cobb County, there is an active domestic violence project which covers Temporary Protective Order (TPO) hearings every Tuesday. As a result of ALAS helping to improve referrals from the local YWCA, the office has been able to double the number of volunteers willing to take these cases. Currently, 5 - 6 volunteer attorneys will be on-hand to cover TPOs on Tuesday, with at least two volunteers guaranteed each week. Three law firms have agreed to dedicate a week each month to staffing TPO hearings in Cobb County, training their associates to handle the hearings and opening approximately four cases each week for additional or more extended services.

Other program services to the eligible client population

Finding 12. ALAS staff are engaged in a range of program services to the community and client population.

As mentioned, ALAS staff are active members of the communities in which they work, as well as on a statewide basis. The program engages in a fair amount of community outreach and legal education. As an example which holds true for many other offices and units at ALAS, the Southside (East Point) office has a long-standing relationship with a large nonprofit agency that helps low-income people with rent and utilities, taxes and government benefits. ALAS attorneys come to the agency once a month to provide workshops on landlord-tenant law for tenants who are being assisted by the center.

In ALAS' Gwinnett Office, the staff have developed a set of family law forms and makes them available free online. The Cobb office managing attorney attends the monthly meetings of the Cobb County Collaborative and is responsible for its peer review process. The Governor of Georgia recently appointed ALAS' Cobb County pro bono coordinator to serve on the Georgia Commission on Family Violence. Another staff attorney in Cobb County conducts a series of workshops on housing, used cars, and other consumer matters at the Center for Family Resources. *Please see related findings and discussion in Performance Area Two and Four.*

PERFORMANCE AREA FOUR. EFFECTIVENESS OF GOVERNANCE, LEADERSHIP AND ADMINISTRATION.

Board governance

Finding 14. ALAS has a large, strong and engaged board of directors which is actively interested in the organization's success. Board members appear to understand the importance of their role and are appropriately involved in major policy decisions and discussions about long-term sustainability.

Under the ALAS' current bylaws, the board of directors has 32 members and an executive committee of 8 members. The executive committee consists of the board president, immediate-past president, first vice-president, second vice-president, secretary-treasurer, and three additional board members. The board's well-established line of succession for leadership positions seems to work particularly well. As is true with many nonprofit boards, ALAS board leaders move through the officer positions - secretary, treasurer, first and second vice presidents,

endowment
committee

Currently, the board includes an individual who is a Certified Public Accountant who serves on ALAS' audit, finance, and executive committees. The board also has an attorney member who has served as ALAS' financial investment specialist for their endowment, and the program more recently created an ad hoc building committee with additional volunteer members who possess transactional and real estate expertise. This committee has actively been engaged in analyzing and negotiating for the possible purchase of the historic downtown building.

Leadership

Finding 15. ALAS is led by a strong executive director who emphasizes innovation and flexibility, maintaining clarity of purpose for the organization over many years and challenges.

ALAS' executive director, Steve Gottlieb, was uniformly described during the visit by staff and myriad external stakeholders as an outstanding leader who is well-respected for his intellect, resourcefulness, and strong instincts to connect people to the organization, projects, and resources. Many staff spoke of his innate ability to find the right person for the right job, and his personal philosophy is reflected in most aspects of the program's service delivery and internal operations. The team observed in the course of the visit that "many roads lead to Steve" and nearly all of the external stakeholders interviewed clearly identified the program and its brand with the executive director and his leadership.

He was described with clear pride by many individuals interviewed; savvy and constantly building support for ALAS. He was observed to be an outspoken and unrelenting advocate for the legal aid community and ALAS, who also deflected attention and credit for successful ideas to others around him. One board member described how he fully takes responsibility for fundraising and the challenges facing the organization. "His job is creating the conditions for a lot of good lawyers to do good work." Another board member noted how the executive director is a strong communicator with his staff and board, "excellent at relationships and laying the groundwork. There are no surprises with him."

During the visit, the executive director's skill and experience were on display in unintended ways. On Wednesday, November 16, 2011, in the middle of the program quality visit, LSC released the congressional Conference Report budget announcing the 14.8% funding reduction for LSC grantees, which amounted to a \$425,000 funding decrease for ALAS in FY12. Maintaining his focus, composure, and concern through the rest of the week, the executive director contacted and was immediately interviewed by Atlanta's daily legal newspaper, the Daily Record, which ran his photo and news of the LSC funding reduction as the front-page story two days later. He informed his board and executive committee of the reduction and discussed it at their regularly-scheduled monthly meeting. He ended the week with a note of appreciation to his staff for their work before and during the LSC visit and shared news of the funding reduction, the scope of which would necessitate further cuts to the program. In his email communication, he assured staff that the organization would develop new resources in response to the cuts, "protect our core," and not make precipitous decisions, promising to keep everyone informed.

Mental Health and Disability Rights Project

Finding 16. ALAS is undergoing and planning for leadership transition in key areas and is leveraging its strong, deep base of advocates to move the program forward.

The ALAS board and staff are currently engaged in succession planning most recently in the key areas of Home Defense and ~~HELP~~. With the recent retirement of their Home Defense founding attorney, the organization appears to have approached succession of key veteran staff again using an individualized, "contextual" approach. The current Home Defense managing attorney worked for several years with the former managing attorney before he retired and she has adapted the manager's role to allow other attorneys take leadership of responsibilities formerly held by the founder of the project. It appeared to be a successful transition in a core area of practice for the program. Planned, yet organic, and fitting with ALAS' culture of focusing on core services and strengths of the individuals in the team.

The program is taking a similar approach towards grooming its new and mid-level staff for internal leadership in other key areas and offices. The executive director is providing significant time, leadership, skill, and judgment to the overall process. Similarly, the program could benefit from developing potential executive leadership skills and implementing management structures which could help sustain ALAS' continued success in the future.

Recommendation IV.2.16.1 The program should continue to consider creative ways to define and expand the executive director and senior leadership's skills which have been important to the program's success. This could include mentoring by the ALAS' executive director for staff and/or board members. The program should also consider how the recommendations in Performance Area Three support their succession planning efforts.

Overall management and administration

Finding 17. The program recently restructured its technology staff and hopes to achieve greater efficiency and effectiveness through its use of the VoIP phone system and Microsoft SharePoint. It has received two TIG grants for FY12 to support this effort.

As mentioned earlier in this report, ALAS approaches management structures, processes and systems loosely, affording managers and supervisors with discretion in shaping the policies that make sense for their staff, office, and clients. Based on interviews during the visit, ALAS staff value this flexibility but some staff noted how they would appreciate more consistent systems, more concrete managerial roles, specific job descriptions, and ongoing formal evaluations or feedback. *Please see discussion and recommendations under Performance Area Three.*

One of the areas noted for improvement by program management, staff, and several board members was the use of technology at ALAS. Recently, the program restructured its IT staff and ALAS management hopes this change, along with the TIG funding, will provide an opportunity to proactively address the program's technology needs. The program currently uses Legal Server as its case management system and its TIG projects will increase the capacity of the program to streamline its administrative and legal operations using telephone, server, and website improvements that combine with existing remote office capabilities such as email,

There is significant discussion in *Performance Area Three* about the quality of services at the program and its nexus with ALAS' experienced and engaged advocates who are supported by strong leadership and with innovative and thoughtful investments in staff recruitment, development, and retention. At ALAS, the deputy director is primarily responsible for human resources administration which includes addressing personnel issues, ~~benefits administration,~~ hiring, performance evaluation, and staff development. Because the program places such a strong focus on its staff, she works closely with the executive director, advocacy director, managers, and supervisors in fulfilling her responsibilities. For all of the innovative staff development strategies noted in the discussion of *Performance Area Three* the executive director, deputy director and advocacy director have been enthusiastic in ensuring staff development initiatives are implemented well and thoughtfully throughout the program. From the visit, the degree to which the program engages in formal human resources trainings for the senior management team and supervisors was unclear. This training is important for any large office and should complement ALAS' flexible approach to management and interest in maintaining high standards for professionalism and innovation.

Resource development

Finding 20. ALAS has a pioneering and highly-effective resource development effort.

ALAS does a remarkable job of fundraising with a talented and experienced development staff. Their long-standing and highly successful private bar campaign is a model for legal services programs around the country and the executive director was one of the founders of the Fundraising Project for the national legal aid community in 1983. In addition to the executive director, the program has two and a half additional staff people who are responsible for an extremely broad and ambitious range of fundraising, media, and marketing activities including: foundation and government funding, planned giving and endowment campaigns, special events, and a well-established private bar campaign. The development staff wear many hats and are well-integrated in the program, working closely with ALAS staff in all of the offices and projects to continuously and persistently identify and maintain resources and relationships for the organization. The 2009 Chronicle of Philanthropy listed ALAS as one of five nonprofit organizations that could best weather the financial storm, noting that ALAS was an effective steward of the monies it gathered with 10% of its funding going to management and fundraising and the remaining 90% to direct services.

Annual campaign: ALAS began its first annual campaign in 1983 when the program received over 75% of its revenue from a single funder, LSC. The initial goal of the campaign in 1983 was \$150,000. The campaign goal has now grown to \$1.6 million in private funding annually with ALAS having approximately 30% of its total funding from LSC. In spite of the current difficult fiscal times, ALAS' private bar campaign increased its law firm sponsorship by increasing the "Pacesetter" contribution from \$400 to \$500 per attorney in 2011. For a number of law firms, this represented five-figure increases from prior sponsorship levels and ALAS was able to maintain the same level of participation with additional revenue to the organization.

the 1998 Society Fund,
a foundation supported
by ~~the~~ children's healthcare of Atlanta doctors.

Endowment: In 1996, ALAS created its endowment from a cy prés award which both ALAS and Georgia Legal Services Program received. Through the efforts of its endowment campaign, ALAS' endowment has grown to approximately \$3.8 million which has helped the program weather significant funding cuts and ~~continue to support special projects:~~

allows the program the flexibility to develop special projects

Foundation and government funding: ALAS has also been effective and entrepreneurial in seeking funding for specific population groups, such as Ryan White, the Komen Foundation, and ~~area doctors.~~ The program does an excellent job of bringing in grants and donations for innovative projects and using its broad community of supporters to raise funds. For example, a transactional attorney and active member of the Gwinnett County bar and business community secured a meeting for the program with local government officials which resulted in ALAS obtaining a \$50,000 local government grant for the office,

which has been ongoing special court and even increased since that time.

Publicizing achievements and maintaining goodwill: The program has learned how to highlight its accomplishments from the United Way's early push for grantees to demonstrate outcomes of services provided. More recently, the program has engaged the pro bono support of a financial expert at a law firm to further assist the program in quantifying and demonstrating the results of its work to donors, funders, and appropriators. In connection with the LSC visit, for example, the program was able to show how a favorable ruling in a precedent-setting food stamp case will result in \$8 million in food stamp benefits to previously ineligible people.

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Over the past two years, the program has also been working on an archiving process and with a filmmaker to create, "One Law For All," a documentary film which captures and shares the history and story of ALAS. The film was completed and premiered in 2011 with an exclusive preview event, a sold-out opening at the Rialto Center for the Arts at Georgia State University, and airing on Atlanta's Public Broadcasting Corporation affiliate. The filmmaking process and documentary itself was highlighted by LSC as an important "innovation" in legal services at the annual 2011 National Legal Aid and Defender's Association conference.

Coherent and comprehensive delivery structure

Finding 21. ALAS has an effective and well-integrated delivery structure supported by strong internal communication and coordination of its work.

Overall, and across offices, ALAS is a well-integrated and well-rounded program. A number of people expressed the sentiment that the cases were "our cases" and not the cases of individuals or volunteers. Staff attorneys were informally aware of internal expertise and rely on each other across offices for advice and assistance with cases. The program-wide task forces in substantive areas are well attended by staff throughout the program and provide a good vehicle for communication about legal developments. The staff are well-coordinated and active on email and listservs, routinely communicating across offices for advice and assistance. The program frequently hosts meetings with staff from different projects and offices in the Decatur or downtown offices which allows for collaboration and shared ideas across the program regardless of position or location.

Participation in an integrated legal services delivery system

Finding 22. ALAS is engaged in a number of statewide efforts and, where practicable, collaborates with the Georgia Legal Services Program (GLSP).

As mentioned, ALAS staff and board members are engaged in a number of activities which coordinate with bar associations, higher learning institutions, task forces, service providers and other agencies throughout its service area. ~~In recent years, there does not appear to be a significant amount of collaboration between ALAS and GLSP, LSC's other grantee in the state. The programs, due to budget constraints, are no longer jointly hosting the annual Legal Aid University, although both programs have shared grants and agreements to address senior law issues: At the staff level, ALAS does make efforts to maintain communication with GLSP on relevant cases, matters, or statewide issues.~~

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CONCLUSION

The Atlanta Legal Aid Society is an organization with a history of accomplishments and relentless resourcefulness that has improved the lives of countless low-income people. Consistent with its history of providing strong and meaningful services, and through the challenging revenue environment, it is currently positioning itself for continued long-term success and sustainability, grounded in its mission to provide quality and core legal services to people most in need.