



LEGAL SERVICES CORPORATION

Office of Program Performance

FINAL PROGRAM QUALITY REPORT

FOR

Bay Area Legal Aid

Recipient Number: 805270

February 28 – March 4, 2011

Team Members:

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INTRODUCTION

The Legal Services Corporation's (LSC) Office of Program Performance (OPP) conducted a program quality visit to Bay Area Legal Aid (BayLegal) from February 28 – March 4, 2011. The team members were team leader Chuck Greenfield (Program Counsel), Cynthia Schneider (Deputy Director, Office of Program Performance), Christy Fisher (Program Counsel), Cesar Britos (OPP Temporary Employee), Catherine Carr (OPP Temporary Employee) and John Johnson (OPP Temporary Employee.)

Program quality visits are designed to ensure that LSC grantees provide the highest quality legal services to eligible clients. In conducting its assessment, the team carefully reviewed the documents LSC received from the program, including its LSC grant application for 2011 funding, 2010 case service reports (CSRs), 2010 other service reports (OSRs), the numerous documents the program submitted in advance of the visit along with advocates' writing samples, and a survey of BayLegal staff conducted by LSC.

On site, the team visited BayLegal offices in Oakland (central and regional offices), San Francisco, Redwood City, San Jose and Richmond. In addition to speaking to many BayLegal staff members, the team met or had telephone conversations with a number of BayLegal board members, judges, representatives of local government agencies, and representatives of community organizations.

In performing its evaluation of the grantee's delivery system, OPP relies on the LSC Act and regulations, LSC Performance Criteria, LSC Program Letters, and the ABA Standards for the Provision of Civil Legal Aid. This evaluation is organized according to the four LSC Performance Areas that cover: (1) needs assessment, priority setting, and strategic planning; (2) engagement of the low income community; (3) legal work management and the legal work produced; and (4) program management including board governance, leadership, resource development, and coordination within the delivery system.

Following the visit, a draft report was sent to the program. BayLegal responded to the draft report in a letter dated June 9, 2011. The letter is attached to this report.

Program Overview

BayLegal is headquartered in Oakland and has regional offices in Oakland, San Francisco, Redwood City, San Jose, San Rafael, and Richmond.

The program has a vast service area that includes the San Francisco Bay Area counties of Alameda, Contra Costa, Marin, Napa, San Mateo, Santa Clara and the City and County of San Francisco. The program provides a full range of services to a very diverse population. According to the 2000 Census, BayLegal's service area has 499,832 persons living in poverty.

The program has a delivery system consisting of limited service, pro se assistance, and full representation. BayLegal has a total staff of 88 employees, including 49 attorneys

and 14 paralegal advocates. Ramon Arias has been executive director of BayLegal since the formation of the organization in 2000.

BayLegal's total 2011 projected budget was \$9,523,379, including revenue of \$4,952,559 from LSC. Non-LSC funding totaled \$4,570,820, or 48% of the program's total revenue. As consequence of recent congressional budgetary action, the program's 2011 LSC grant was reduced by \$197,601 to a total of \$4,747,831.

In 2010, the majority of the program's 7,693 total closed cases were in housing (48.8%), income maintenance (22.4%), family (14.9%) and health (7.7%.)

Summary of Findings

BayLegal engages in high-quality legal work. It is led by a strong, visionary and thoughtful executive director and active board of directors who are fully committed to the program's mission. The program utilizes systems, approaches, and techniques sufficient to ensure that legal assistance is carried out effectively and at a high level of quality. The program has attorneys, advocates and support staff who are qualified to do the work assigned, have necessary expertise in the legal areas in which the program works, and have the commitment, cultural competency, language capacity, skill and preparation necessary to carry out their responsibilities. BayLegal's services, communications and activities are conducted in a culturally and linguistically competent fashion, and reach significant segments of the low-income population.

The program is actively engaged with low-income communities in its service area. BayLegal conducts periodic comprehensive assessments of the most pressing legal needs in its service area. The program annually reviews its priorities and has systems and approaches reasonably calculated to identify new pressing issues and legal needs. The program has established specific goals and objectives and developed specific strategies for achieving desired outcomes. Even though the program has not engaged in formal strategic planning, it timely and strategically analyzes and acts upon challenges and opportunities. While the program engages in some consumer work, BayLegal should consider handling additional consumer cases given the need for this legal assistance in the service area.

BayLegal seeks to ensure that potential clients have access to its services through a variety of portals. The primary portal for service is the Legal Advice Line (LAL) – a highly efficient telephone advice system that is the only one of its kind in Northern California. The program should continue evaluating its intake system and should examine additional measures it could take – increase of intake hours, development of on-line intake, etc. - to ensure access and utilization by all members of the client community. The program should consider giving LAL attorneys and advocates the opportunity to accompany other program attorneys and advocates to court or administrative hearings. As a training tool for LAL staff, BayLegal should consider whether LAL staff would benefit from learning how a case that was referred to a local office progressed.

BayLegal provides a variety of other services to the low-income community, including offering community legal education, participating in courthouse-based clinics, and providing pro se assistance. The program also engages in a variety of strategic activities designed to have a beneficial effect on systemic legal problems and economic opportunities of the eligible client population.

The program offers pro bono attorneys a variety of volunteer opportunities. The goal of BayLegal's private attorney involvement (PAI) program is to maximize PAI resources by focusing on areas of greatest need.

The program should institute an office-wide approach to the calendaring of all critical case-handling dates and deadlines to ensure back up to the calendar of each attorney and advocate in case they are unexpectedly absent from the office. The program should systematize procedures for translating correspondence to minimize use of attorney time.

BayLegal has up-to-date equipment and technology, including a remotely accessible case management system, a brief and information bank, and the ability to update much of its software remotely. The program is encouraged to implement its plan to extend remote accessibility, including making its intranet remotely accessible and utilizing air cards on laptops for connectivity to the Internet. As resources become available, the program should consider hiring an additional employee to help with IT.

BayLegal's Board of Directors is highly effective, involved in major policy decisions, aware of the issues in the program, and exercises effective financial oversight. The program's senior level management is strong. BayLegal values management and has recruited, hired and retained highly-qualified managers for the offices. The program should continue its efforts to develop a comprehensive disaster recovery plan.

The program has an experienced and well-staffed finance department which provides monthly financial reports showing actual income and expenses, budgeted amounts, variances and cash flow. The reports are shared with the executive director, the board's audit and finance committee and the board. BayLegal's human resources staffing is in a period of transition. The program should continue to consider possible increases in attorney salaries in order to help retain staff.

BayLegal maintains effective communications between staff as well as management and staff. The program should consider periodically holding a program-wide meeting or retreat so that all employees in the program have the opportunity to interact and discuss issues relevant to the program.

BayLegal is strategic in its fundraising efforts. It has a well trained and effective staff which brings in funds, handles public relations and handles reporting and tracking of donations, grants, contracts and audits.

The program is actively involved in regional, statewide and national efforts to improve access to justice.