

# How to Find and Handle Your First Pro Bono Case

May 29, 2013

9:00 a.m. – 12:30 p.m.

## Why You Should Attend

This program is a great opportunity to get a strong overview of the world of pro bono, how it can enrich and advance your professional development, and how to make it happen.

## What You Will Learn

How to find the right case:

- What types of cases are right to meet your goals
- How to pick pro bono opportunities that fit in with your current employment situation
- Where to find cases or matters
- Options in types of volunteering commitments

Handling your first case:

- Ensuring that you are or become competent
- Handling your first client meeting
- Understanding your client's circumstances
- Working with the court
- Finishing up the case

## Who Should Attend

People who have not yet handled their first pro bono case, or have just taken their first matter, and people who work with newer attorneys in professional development or pro bono.

## Program Schedule

9:00

### Program Overview and Introductions

*Tiela Chalmers*

9:15

### How to Find the Right Case

- Figuring out what you are interested in
- What are the constraints and systems of your current situation
- Finding out what work is available

- Options in types of volunteering
  - Impact litigation (shouldn't be your first case unless you are in a large firm and someone else will be involved on a daily basis)
  - Full scope cases – outline types and what you gain from each
    - Landlord/Tenant – like business litigation, not too long, may get trial, may save housing
    - Family – procedures are different but a chance to make a huge difference in a very personal arena, chance to have huge impact on kids, can go on a long time but not so many tight deadlines
    - Government benefits – affecting income for folks
    - Consumer – chance to practice negotiation
    - Immigration – can often encompass all of the above topics, etc.
  - Limited scope – explain and give examples
  - Clinic setting – brief advice
  - Self-help
  - Teaching
  - Other

*Hilarie A. Atkisson, Tiela Chalmers, Paul Chavez, Elizabeth Hom, Parisa Ijadi-Maghsoodi*

10:15

### **How to Handle Your First Case**

- Competence
  - Be sure you are trained – go to or repeat training close to time you take the case
  - If you have questions or concerns, ask for help right away
  - Challenges with client – call the agency
- Initial meetings
  - Meet with client, go over all the facts you know, confirm things, follow lines of questioning
  - Ask client other questions about their situation and environment that will help you understand them
  - Ascertain just by your conversation, to the extent you can:
    - Does client understand English well enough to talk directly with you? (If not, are interpreters available through agency? Through your firm?)
    - Does client appear to be able to read and write comfortably?
    - Does client appear to you to have problems focusing, or understanding or following you?
  - Set the right tone for the relationship
  - Retainer agreement
  - Exude competence
  - Be friendly and open
  - Be clear about what you want client to do
  - Write down for client what you want client to do
  - Set clear expectations for how often you will talk with client, and what client can do if s/he has questions

*Hilarie A. Atkisson, Tiela Chalmers, Paul Chavez, Elizabeth Hom, Parisa Ijadi-Maghsoodi*

11:15

*Networking Break*

11:30

**Important Considerations & Best Practices for Pro Bono Representation**

- Understanding the challenges facing individual clients living in poverty
  - Financial issues- what it's like to try to make ends meet
    - Prioritization of expenses
    - Unbanked
    - Costs more to be poor
  - Challenges with keeping appointments
  - Transportation challenges
  - Other
- Working with court
  - If appropriate let court know you are working pro bono
- Finishing case
  - Disengagement letter
  - Documents to client
  - Notify agency about hours and outcome
    - Why this is important
- Why it makes sense to build a lifetime practice of doing pro bono

*Hilarie A. Atkisson, Tiela Chalmers, Paul Chavez, Elizabeth Hom, Parisa Ijadi-Maghsoodi*

12:30

*Adjourn*

## **Faculty**

### **Chairperson**

#### **Tiela Chalmers**

Tiela Chalmers Consulting  
San Francisco, California

---

#### **Hilarie A. Atkisson**

Senior Manager, Pro Bono Administration  
Bingham McCutchen LLP  
San Francisco, California

#### **Paul R. Chavez**

Senior Attorney & Pro Bono Coordinator  
Lawyers' Committee for Civil Rights of the San Francisco Bay Area  
San Francisco, California

**Elizabeth Hom**

Managing Attorney

Alameda County Bar Association Volunteer Legal Services Corporation

Oakland, California

**Parisa Ijadi-Maghsoodi**

Managing Attorney

Legal Services of Northern California - Senior Legal Hotline

Sacramento, California

**Program Attorney:** Christina Thompson