

## Giving Summary Advice to Non-Profits and Charities: A Legal Primer

*Ontario Bar Association-Pro Bono Law Ontario Joint Program*



In-Person



Webcast

**Date:** Thursday, October 13, 2016 | 9:30 am to 12:00 pm

**Location:** Twenty Toronto Street Conferences and Events  
20 Toronto Street, 2<sup>nd</sup> Floor, Toronto

**Program Chair:** **Matthew Wiens**, Pro Bono Law Ontario



This program contains 0.5 Professionalism Hours  
This program is eligible for up to 2 Substantive Hours

*The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Upper Canada.*

Use your unique skills to help the non-profits and charities that make Ontario a better place to live, work and play! Ontario's non-profits and charities deliver vital social services and create economic opportunities for the neediest members of society. Yet, their managers and boards often struggle to navigate a complex and bewildering regulatory framework. When you help them to understand their legal obligations and avoid unnecessary legal issues, you allow them to devote their precious resources to their missions and mandates. PBO's Corporate Pro Bono Clinic is designed to help organizations understand their legal responsibilities and rights. The Clinic is a registered PBO project and volunteers are eligible for extended malpractice coverage from LawPRO.

One Corporate Pro Bono Clinic commented that "The pro bono law clinic for non-profits (especially in the start-up phase) is extremely valuable and very much appreciated! Please continue to offer this service". Register now to learn how you can use your unique skills set to help make a difference!

9:00 am Registration and Coffee

9:30 am **Welcome and Project Overview**

**Matthew Wiens**, Pro Bono Law Ontario

- Background and introduction to project partners
- Overview of project goals and high-level summary of project operations
- Introduction to the Corporate Law Clinic

9:45 am **The Legal Needs of Ontario's Charitable Sector**

**Andrea Cohen Barrack**, Ontario Trillium Foundation

10:00 am **The 5 Most Common Legal Issues for Non-Profits and Charities**

- Incorporation
- By-Laws and governance
- Employment issues
- Managing volunteers
- Intellectual property

10:45 am **How You Can Help**

- Volunteer for the matching project
- Providing summary advice at PBO's Corporate Law Clinic

11:00 am **Providing Summary Advice**

- Description of the volunteers' role
- Program scope and services
- Lawyers' duties and responsibilities
  - Short-Term Limited Legal Services (Rule 3.4-16.2)
  - Integrity - Duty to Uphold the Standards of the Legal Profession (Rule 2.1-2)
- Best practices for the provision of summary advice
  - Establishing a rapport
  - Assessing client capacity (e.g. language skills, ability to follow complex instructions and other barriers to justice) and adapting accordingly
  - Techniques for interviewing
  - How to ensure effective communication
  - What to do if you don't know the answer
  - ABC's of effective referrals
  - Document, Document, Document – Case dispositions as a legal resource

11:30 am **Matching Project**

11:45 am **Questions and Closing Remarks**

12:00 pm **Program Concludes**

**PROGRAM REGISTRATION IS ONLINE** [www.oba.org/pd](http://www.oba.org/pd)

Questions? [pd@oba.org](mailto:pd@oba.org)