

VOLUNTEER HANDBOOK

**TABLE OF CONTENTS**

I. INTRODUCTION, MISSION, CORE VALUES, & HISTORY………………………………….…..3

II. ORGANIZATION ……………………………………………………………………………………4

III. VOLUNTEER OPPORTUNITIES AT LEGAL AID CLINICS …………………………………6

* PROFESSIONAL LIABILITY INSURANCE
* THE LEGAL AID CLINIC ENVIRONMENT
* LEGAL AID CLINIC LOCATIONS

IV. TRAINING………………………………………………………………………………………..7

V. VOLUNTEER STANDARDS FOR PARTICIPATION AND DUTIES…………………………8

* DRESS CODE
* GENERAL STANDARDS
* THE VOLUNTEER– CLIENT RELATIONSHIP
* CLIENT CONTACT
* SOLITICATION
* SEXUAL HARASSMENT & DISCRIMINATION

VI. CONFLICT OF INTEREST…………………………………………………………………….12

VII. LEAVING VOLUNTEER SERVICE……………..………….…………………………………….12

* UNAVAILABILITY
* EMERGENCY AND OTHER SITUATIONS

VIII. BENEVOLENCE………………………………………………………………..…………………13

IX. CLIENT REFERRAL POLICY……………………………………………………………………14

* GOOD SAMARITAN ADVOCATES GUIDE TO MAKING REFERRALS 2015
* ABOUT REFERRAL ATTORNEYS AND OTHER PROFESSIONALS

APPENDIX A – VOLUNTEER APPLICATION…………………………………………………….20

APPENDIX B – STATEMENT OF FAITH……………………………………………………….….22

APPENDIX C – CONFIDENTIALITY POLICY……………………………………………………23

APPENDIX D – CLIENT REFERRAL FORM…………………………………………………..….24

APPENDIX E - CLIENT ADVICE FORM…………………………………………………………..25

APPENDIX F - BENEVOLENCE APPLICATION………………………………………………….26

APPENDIX G – PROFESSIONAL ETHICS, VA RULE 1.8 & MD RULE 1.8……………….……27

APPENDIX H - ADDITIONAL INFORMATION ………………………………………………….31

**I. INTRODUCTION**

Welcome to [Good Samaritan Advocates®](http://www.goodsamaritanadvocates.org/find_us/)! We are very grateful to all of our volunteers for their passionate and selfless service to our clients. It is our hope that with your help, we can fulfill our mission and provide quality, compassionate legal services to lower income and modest means residents of the Greater Washington DC Area. We pray that it will not only be fulfilling to you personally but that we will have a lasting and permanent impact on the clients we serve, their families and the community.

**MISSION**

Our mission is “seeking justice for our neighbors in need through legal aid, advocacy, and the transforming grace of Jesus Christ.”

**CORE VALUES**

**Christ-Centered:** We are a Christian organization that loves God and seeks to follow Him in everything we do.

**Servant Leadership:** We love our neighbors and each other by following Jesus’ example of humbling ourselves in order to meet the needs of others.

**Trustworthy:** We provide quality legal services to our clients and we are committed to being good stewards of the time, talent, and financial resources of our employees, volunteers, donors, and partners.

**HISTORY**

The Washington D.C. suburban area has one of the highest median incomes in the nation, yet this fact is overshadowed by the reality that thousands of families in our own backyard teeter on the brink of poverty.  In 2005, severallawyers in northern Virginia recognized this need and heeded Christ’s call to serve “the least of these brothers and sisters” (Matthew 25:40).  The following year, they started a free legal clinic at Columbia Baptist Church in Falls Church, which they called Christian Legal Aid of Northern Virginia.  In 2009, a group of attorneys at Covenant Life Church in Maryland were inspired to do the same.

For several years, these two groups of like-minded attorneys operated separate Saturday morning legal clinics to serve the surrounding communities.  In 2011, Christian Legal Aid of Northern Virginia’s Board of Directors recognized that more needed to be done, especially in light of the nationwide economic decline.  Thanks to a generous pledge of 5 months half-time salary and office space from Gammon & Grange, PC in Tysons Corner, they hired their first Executive Director, Attorney Justina Uram-Mubangu, to lead the charge. The Executive Director first sought to unify the Virginia and Maryland legal clinics under the same umbrella, [Good Samaritan Advocates®](http://www.goodsamaritanadvocates.org/find_us/)**,**a name we believe embodies the mission we seek to accomplish. Shortly thereafter, Good Samaritan developed a pro bono attorney training program and a formal reduced fee referral program was established.

Today, our Legal Aid Clinics, Pro Bono Attorney Training Program, and Community Legal Education Program are supported by over 150 caring volunteers: lawyers, paralegals, law students, interpreters, church and business leaders, and other professionals who come together to provide quality, compassionate legal counsel and practical guidance to our neighbors in Arlington, Fairfax, Loudoun, Alexandria, and Montgomery Counties of greater Washington, DC.

We strive to accomplish our mission by:

* Partnering with local churches to host legal aid clinics
* Offering presentations and publications on poverty law issues through our Community Legal Education Program
* Providing training opportunities for local attorneys and other professionals through our Pro Bono Attorney Training Program  
    
  Matching lower income clients who have ongoing legal needs to attorneys, firms and NGO participants of our Reduced Fee Referral Network.

**II. ORGANIZATION**

We are a tax-exempt 501(c)(3) organization. All donations are tax- deductible. We are a faith-based nonprofit organization rooted in God. We serve clients regardless of religious affiliation.

Good Samaritan Advocates® is governed by a Board of Directors comprised of diverse individuals of the Christian faith.  The Board of Directors provides guidance on our programmatic priorities and policies.

**2015 Board of Directors  
  
Stephen Clarke, Esq.**

*Executive Director, Exempt Organizations Tax Practice*

Ernst & Young, LLP, Washington, DC

*Christ Church of Arlington, VA*

**Kenneth Liu, Esq.**

*National Director of Legal Aid Ministries*

Christian Legal Society, Springfield, VA

*Protection of the Holy Mother of God Eastern Orthodox Church, Falls Church, VA*

**Lyssa Hall, Esq.**

Member, *Covenant Life Church, Gaithersburg, MD*

**Wray Fitch, Esq.***Owner & Director, Federal Communications Practice*

Gammon & Grange, P.C., Tysons Corner, VA

*Restoration Anglican Church, Arlington, VA*

**Jim Monahan***Executive Director*

Navy Sea Cadet Corp, Arlington, VA

*Columbia Baptist Church, Falls Church, VA*

**William Estrada, Esq.**

*Director of Federal Relations*

Home School Legal Defense Fund, Purcellville, VA

*Cornerstone Chapel of Leesburg, VA*

**III. VOLUNTEER OPPORTUNITIES AT LEGAL AID CLINICS**

We welcome attorneys, law students, and non-lawyer volunteers who desire to serve our neighbors in their times of need.

Our **legal clinic volunteers** are practicing Christians, representing various church traditions, who live locally and use their legal skills as a ministry to serve others. Our **referral attorneys and professionals** are from various faith (or no faith) backgrounds and can live locally or away.

Our Good Samaritan Advocates work as a team.  Our legal clinic attorneys serve in teams to consult with clients with the support of volunteer legal assistants and interpreters.  New volunteers are always paired with more experienced volunteers so those new to our program can learn by experience.

Volunteers may sign up for clinics in advance, or respond to specific e-mail requests for volunteers a few weeks before a clinic.  We also need volunteers who are willing to help outside of clinic hours in various roles.

**PROFESSIONAL LIABILITY INSURANCE COVERAGE**

We provide Professional Liability Insurance Coverage for all of our legal clinic attorneys through NLADA Lawyers Professional Liability Insurance System.

**THE** **LEGAL AID CLINIC ENVIRONMENT**

Good Samaritan Advocates offers several legal aid clinics on Saturday mornings at local churches throughout greater Washington, DC.  Lower to moderate income individuals who qualify are pre-screened and scheduled for a 1 to 1.5 hour consultation with a team of 2 or more pro bono attorneys who are assisted by paralegals, law students, translators, and other professionals. Through our legal clinics, we offer general legal advice on most civil matters, provide pro se coaching, and where able, offer limited scope representation or pro bono or reduced fee referrals. Team members are also available to pray with clients and offer a compassionate ear.

**LEGAL AID CLINIC LOCATIONS**

Good Samaritan Advocates operates the following legal aid clinics:

|  |  |  |
| --- | --- | --- |
| **Montgomery County, MD** | **Loudoun County, VA** | **Fairfax County, VA** |
| Good Samaritan Advocates at Covenant Life Church  7501 Muncaster Mill Road Gaithersburg, MD 20877  Ph. (301) 869-2800  *Legal clinic is held on the 2nd Saturday of each month, 9AM to 1:00 PM.* | Good Samaritan Advocates at Reston Bible Church  45650 Oakbrook Court Dulles, VA 20166  Ph. (703) 404-5034  *Legal clinic is held on the3rd Saturday of each month, 9AM to 1:00 PM.* | Good Samaritan Advocates at Columbia Baptist Crossroads  3245 Glen Carlyn Road Falls Church, VA 22041  Ph. (703) 534-5740 ext. 524  *Legal clinic is held on the 4th Saturday of each month, 9AM to 1:00PM.* |

**TYPES OF LEGAL MATTERS**

Our legal clinics are general advice clinics. Pro-bono attorneys typically assist our clients with immigration and family law cases as well as bankruptcy, consumer/debt issues, public benefits, housing/landlord/tenant, elder law, employment law, and general civil litigation.

**IV. TRAINING**

We provide training and materials to ensure that our volunteers have the tools and skills they need to best serve the legal needs of our neighbors.

Good Samaritan Advocates’ Pro Bono Attorney Training Program presents training sessions and Continuing Legal Education (CLE) courses for attorneys, paralegals, and other interested volunteers who wish to engage in pro bono legal services through Good Samaritan Advocates or other local legal aid organizations.  We also facilitate participation for our volunteers in courses offered by our partners and other organizations. During the first quarter of each year, we hold an Introductory Training Session for new and interested volunteers.

Through our training program, we strive to equip volunteer attorneys to serve the legal needs of our poor and lower income neighbors.  Our specific, substantive law trainings focus on serving the most underserved members of our of local community. Each course is designed to prepare attorney and paralegal teams to conduct pro bono consultations through our legal clinics and take on pro bono cases through limited and extended scope representation.  In courses presented by our partners and other organizations, we seek to ensure that the sessions focus on poverty law matters or ethics.

To stay abreast of upcoming training opportunities, visit our website [www.goodsamaritanadvocates.org](http://www.goodsamaritanadvocates.org) and subscribe to our newsletter at [http://visitor.r20.constantcontact.com/manage/optin/ea?v=0012fic7nRhSvBaARckdjeVig%3D%3D](http://visitor.r20.constantcontact.com/manage/optin/ea?v=0012fic7nrhsvbaarckdjevig%253d%253d)

**V. VOLUNTEER STANDARDS FOR PARTICIPATION AND DUTIES**

**DRESS CODE**

Good Samaritan Advocates legal clinics are intended to be comfortable environments both for our volunteers and clients. As such, pro bono clinic attorneys and volunteers are not expected to wear formal business attire to our Saturday legal aid clinics. However, because we are meeting with clients where an attorney/client relationship will be established (if even for one hour), the minimum dress standard for attorneys and volunteers is “business casual” attire.  Examples of appropriate business casual attire for men include a button-down dress shirt with khaki pants, and for women a sweater and slacks.

**GENERAL STANDARDS**

1. All pro bono clinic attorneys, paralegals, law students, and non-attorney clinic volunteers (hereinafter “clinic volunteers” or “participants”) who participate in Good Samaritan Advocates (also “GSA”) Christian legal aid clinics are *required* to sign up for and participate in at least three legal clinics per year. All clinic volunteers who participate in GSA legal aid clinics shall *generally endeavor* to contribute an average of four hours of service per month to the program.
2. Clinic volunteers who are inactive for one year will no longer be considered program participants and must reapply to GSA should the volunteer wish to continue serving.
3. Participants shall agree with and not act or take any position inconsistent with the GSA Statement of Faith and GSA Standard Operating Procedures (“SOPs”) while engaging in GSA activities.
4. Participants shall endeavor to minister to legal aid recipients (“clients”) holistically and prayerfully, *i.e.*, assist clients in obtaining physical and spiritual aid, in addition to legal aid, with respect and a gentle, loving attitude.  Participants are encouraged to pray with clients (if the clients consent to do so), provide Biblical counsel and, when appropriate, share the Gospel. However, participants shall not be required to do so, and shall seek to assist each client regardless of whether the client agrees to prayer or discussion of overtly spiritual matters.
5. Participants shall be volunteers, and provide their services in connection with GSA *pro bono*, without charge.
6. GSA will seek to provide legal aid to those who cannot afford to pay for legal services, by serving only low-income individuals or individuals who demonstrate an overwhelming need for Christian legal aid.
7. Church partners will complete intake forms for each client whom they schedule for legal aid clinics.  Participants who interview clients at clinics will, when possible, review these forms ahead of their client meetings, complete separate intake forms and other documentation for each client during client meetings, and provide both of these forms to an administrator designated by GSA.
8. Participants will not provide legal advice to clients on matters involving the laws of a particular jurisdiction, unless they are licensed in that jurisdiction.  For instance, an attorney licensed only in Maine may not advise a client on any matter involving Virginia law.  Nor may any law student, paralegal, or non-lawyer provide legal advice to any client.  However, participants not licensed in Virginia or Maryland may work with and under the supervision of a Virginia-licensed or Maryland-licensed attorney.
9. If a Participant is unable to address a client’s legal problem or question during the one hour legal aid appointment, the Participant may provide the following assistance:
   1. Refer the client, when appropriate, to a “referral attorney” in the GSA referral list or, if no such attorney is available, then to Legal Services of Northern Virginia (LSNV) or another legal aid organization. (See SOP entitled, “Client Referral Policy” for more information.)
   2. Provided limited scope follow up, which may include pro se coaching, communicating or negotiating with opposing parties on behalf of the client, or conducting further legal research about the client’s legal issue.
   3. Refer the client to local social service agencies or ministry for help with non-legal problems, when appropriate, for example, refer an unemployed client to a local food bank.  (GSA will provide a referral list of legal aid providers, social service agencies, and ministries for this purpose.)
10. GSA shall provide: (1) assistance in scheduling attorneys to serve at legal aid clinics at GSA partner churches; (2) legal reference materials that participants may consult; (3) referral list(s) for “referral” attorneys, social service providers, ministries, and legal aid organizations; (4) malpractice insurance coverage for all lawyers and volunteers participating in the GSA program and providing legal counsel; and (5) notification of opportunities for continuing legal education in “poverty law” areas.
11. Participants shall encourage clients to engage in actions consistent with Biblical principles, and not to engage in actions that violate Biblical principles.  For example, participants shall:

* Endeavor to promote reconciliation between parties in dispute; for instance, generally encouraging clients in troubled marriages to pursue reconciliation. Participants generally should not assist in helping clients obtain a divorce unless there are biblical grounds for the divorce;
* Encourage clients with unplanned pregnancies to pursue alternatives to abortion, and not assist a client in obtaining an abortion;
* Not encourage clients to engage in unlawful activities;
* Not assist clients in entering into homosexual unions or marriages.

If, after reviewing a client’s intake form, a Participant is unable to address a client’s legal problem due to a matter of conscience, the Participant shall inform the Clinic Director at least 72 hours in advance of the client’s appointment.

**VOLUNTEER – CLIENT RELATIONSHIP**

All clients whom Good Samaritan Advocates pro bono attorneys counsel through our legal aid clinics shall be clients of Good Samaritan Advocates during their clinic interview(s) and shall remain clients only if their pro bono clinic attorneys choose to continue representation outside of the clinic.   Pro bono attorneys shall document the scope of services they intend to provide to the client outside of the legal clinic using the Client Advice Form.

**CLIENT CONTACT**

After an interested individual is certified as a volunteer with Good Samaritan Advocates, the volunteer will be issued a Good Samaritan Advocates’ username and password, which will allow the volunteer to access our Intranet, called “Docs & Resources.” Our Intranet is a secure, cloud-based system powered by Google for Nonprofits contains client files, clinic dockets, and research and referral information. The volunteer will also be issued an email address powered by the same Google system.

Pro bono attorneys and volunteers should communicate with clients using their GSA issued email address, and/or their business email address and phone. When necessary, GSA volunteers shall share the addresses of our legal aid clinics with clients or our PO Box, which is:

Good Samaritan Advocates

PO Box 11053  
McLean, VA 22102

Pro bono attorneys and volunteers shall not share with clients the physical mailing address of Good Samaritan Advocates’ headquarters, which is housed within the law firm Gammon & Grange, PC (8280 Greensboro Drive, 7TH FL, McLean) without approval from the Executive Director.

**SOLICITING**

Volunteers are performing a specific function for Good Samaritan Advocates, which is the delivery of Christian legal aid and advocacy services to needy people. Therefore, volunteers are not to solicit clients for other activities, including but not limited to business activities, activities for other charities, political organizations dealing with anything outside the scope of our mission and the specific volunteer job description. Volunteers may solicit members that they have formed a close relationship with the approval of the Executive Director. If you have any questions about this, please contact your clinic director or the Executive Director.

**SEXUAL HARRASSMENT AND DISCRIMINATION**

Good Samaritan Advocates does not allow sexual harassment and/or other forms of harassment, or discrimination. Good Samaritan will not allow or tolerate inappropriate speech and/or behavior by volunteers towards clients, other volunteers, partners and staff. Likewise, Good Samaritan Advocates will not allow or tolerate inappropriate speech and/or behavior by clients towards volunteers and staff. Such speech and/or behavior may include (but is not limited to) sexual speech or behavior, aggressive speech or behavior, criticisms or critiques about a colleague’s faith tradition, racially-charged speech, or name-calling. Volunteers have a duty to report any violations of this policy to the Executive Director.

**VI. CONFLICT OF INTEREST POLICY**

All services in and through Good Samaritan Advocates’ legal aid clinics are pro bono, i.e., no charge, so there is no monetary benefit to our volunteers; rather our volunteers are contributing their time without any compensation or the expectation of future compensation.

Services through Good Samaritan Advocates’ Reduced Fee Referral Program are either pro bono or “low bono.” The referral attorney should have the required experience and fair rates that are generally well below market. The client should understand and desire the engagement, and overall that it must appear that the client could be well served by this proposed arrangement.

Any licensed GSA pro bono attorney who would like to continue serving a client outside the clinic may do so on a self-assigned, pro bono basis, with the only stipulation that they note this in the Client Next Steps sheet reviewed by the Clinic Director and Co-director at the conclusion of each Clinic, and which goes into the Client file. If however, any GSA attorney serving in the clinic or making contact with a client through the GSA Clinic would like to serve the client on a low-bono or other fee-for-services basis, it must first be referred to the Clinic Director or Executive Director for review and sign off.

**VII. LEAVING VOLUNTEER SERVICE**

Since we are here to serve needy clients, it is important the administrative staff and volunteers know how many attorneys we have available to serve at our legal clinics, community events, etc.

**UNAVAILABILITY**

If a volunteer has personal scheduling conflicts or other commitments that result in the volunteer’s inability to serve for the next clinic, the volunteer should notify the Clinic Director.

**INACTIVE**

Sometimes a volunteer has personal scheduling conflicts or other commitments that results in the volunteer needing to take some time off from his or her volunteer activities, but the volunteer may want to come back to volunteer in the future. The volunteer should inform the Clinic Director with as much lead time as possible. The volunteer can be put on an “inactive” status. This way we know that a volunteer should not be signed up for any clinic appointments during that calendar year.

**EMERGENCY AND OTHER SITUATIONS**

In case of weather/non-weather related emergencies, please check your email about cancellations. If it is unsafe for you to travel or attend the clinic for any reason, please email your Clinic Director immediately so we can make other arrangements for the clinic.

Clinic Director(s) reserve the right to cancel a legal aid clinic due to inclement weather, an incomplete attorney roster, and/or other situations.

**VIII. BENEVOLENCE**

The Good Samaritan Advocates Benevolence Fund is a discreet account that provides one-time or short-term emergency financial assistance to clients of Good Samaritan Advocates.

The purpose of the Fund is to help prevent or mitigate financial emergencies that affect basic life necessities. The Fund is made known only to staff and volunteers of Good Samaritan Advocates and is considered in situations of serious or sudden client financial difficulty.

Volunteers should not notify Good Samaritan Advocates’ clients or third parties outside Good Samaritan Advocates as to the existence of the Benevolence Fund. Volunteers shall make funding requests without the client’s knowledge. If a potential donor approaches a volunteer to inquire about donation opportunities, the volunteer should direct the potential donor to the Executive Director.

Grants to clients are approved for short term financial crisis involving a life necessity, i.e., housing costs, car repair, utility bill, and medical bills. Requests for attorneys’ fees, fees in connection with pending or contemplated litigation, or court filing fees will be denied.

Once a request is approved, the grant award will be sent directly to the debtor, such as the landlord or the utility company. If that is impossible, the grant award may be given to the volunteer requestor with specific written instructions outlining the purpose of the award and the understanding that a written receipt showing that the award was used to satisfy its purpose must be returned to the Executive Director in a timely fashion.

**GUIDANCE FOR SUBMITTING BENEVOLENCE REQUESTS**

Clinic directors are responsible in guiding volunteers who wish to make a Benevolence Fund request. Towards that end, clinic directors should be aware of the following points and applicable rules of professional conduct in addition to the Benevolence Fund Policy and should be prepared to explain them to clinic volunteers when necessary.

* Funding decisions for requests totaling $500 or less are at the discretion of the Executive Director.
* Funding decisions for requests totaling more than $500 are at the discretion of the Executive Director and Board Chair. Amounts will be determined on a case-by-case basis, not to exceed $1,000.
* To make a request, volunteers must read the Benevolence Fund Policy, then fill out the Benevolence Fund Application and submit it to the Executive Director.
* In some situations, additional information may be required to process the request.
* For complete applications totaling $500 or less, the Executive Director will make a decision in   
  no more than seven (7) business days.
* For complete applications totaling $1000 or less, the Executive Director will make a decision in no more than ten (10) business days.
* Incomplete applications may be denied, or may take longer to process.
* Benevolence decisions cannot be appealed.

**IX. CLIENT REFERRAL POLICY**

While an important role of a Good Samaritan Advocates pro bono clinic attorney is to refer certain clients to members of our Reduced Fee Referral Program who can help the client beyond the one hour clinic appointment, not every client’s case merits a referral. Some clients are capable of representing themselves, especially if the opposing party is also unrepresented. These clients benefit well from pro se coaching or other limited scope follow up services, which should be offered, where appropriate, by the pro bono clinic attorney. On the other hand, there are some clients who have cases for which follow up help outside the clinic is either not needed, or referrals are not appropriate.

Determining the best course of follow up assistance, if any, is difficult. When making this determination, pro bono clinic attorneys should *first* consult the policy below, and the Client Referral form located in Appendix D.

**Is a referral appropriate?**

When considering whether a referral is appropriate, the Good Samaritan Advocates pro bono clinic attorney should ask him/ herself the following questions:

1. *Can the client represent him/herself or perform the task himself? If not:*
2. *Is the matter simple enough such that you (the clinic attorney) are capable of, and are willing to devote the time, to help the client? If yes, we encourage you to do so. If not:*
3. *Is the matter one for which GSA has referral attorneys capable of helping?*

There is no guarantee that Good Samaritan Advocates can obtain a referral attorney for our clients who need specialized legal help. There is also no guarantee that the referral will be pro bono, as some of our referral attorneys cannot offer their services pro bono, but can help at a reduced fee. Pro bono clinic attorneys should be prepared to explain this to the client. Keep in mind that we need to be very judicious in asking for help from referral attorneys. They are extremely busy, and it is our privilege to have them as referral attorneys, so their help should only be sought carefully and selectively, or we risk losing Good Samaritan's goodwill with them. We should therefore keep in mind other considerations before making a referral. For example:

1. *Is the client’s claim or case* ***“strong?”***

If the client is unlikely to win the case or succeed in accomplishing his/her goal, then a referral is   
not appropriate.

1. *Is the client’s situation* ***“sympathetic”*** *(e.g., the client has been wronged or experienced some   
   injustice)?*

Because we need to be judicious in referring clients, a case should not be referred out if you feel that pro bono or reduced fee help would not be appropriate for that case or client. Please use your judgment in considering: if you were a referral attorney, would you want to sacrifice your valuable time to help this person? And although we personally ought to show God’s love to all, but we cannot expect our clinic attorneys to do the same, especially since many of them do not share our faith.

Situations in which referrals might not be appropriate include:

* The client is obviously at fault and unrepentant.
* The client has a severely negative attitude.
* The client is unwilling to heed advice.

1. *Would a referral* ***further justice and glorify God***Please also prayerfully consider whether further assistance to the client would be ethically or morally appropriate. For instance, if the client and his/her ex-spouse are both obviously treating each other in a destructive manner and are unrepentant or unwilling to change their behavior, then further assistance may not be appropriate (unless, perhaps, further assistance would benefit the innocent children).

If you believe a referral to a Good Samaritan Advocates’ referral attorney is appropriate, **do not make the referral at the clinic.** Instead, please complete the Client Referral form and email it to your Clinic Director before making a referral.

**GOOD SAMARITAN ADVOCATES’ GUIDE TO MAKING REFERRALS - 2015**

One of the key services of Good Samaritan Advocates is helping clients in dire need find a pro bono or reduced fee referral attorney. While this is so important for so many clients, it's not always easy to make a successful referral.

Therefore, to help you through the process, please keep in mind the following steps when attempting to make a referral:

1.) Determine if a client's case merits a referral. To determine if a client's case merits a referral, consult our Referral Policy and fill out the referral form. Also determine whether a pro bono or reduced fee referral is most appropriate and realistic. (See \* below for more.)

2.) Set realistic client expectations. If the client's case merits a referral, instruct the client that you cannot guarantee a successful referral. You must also instruct the client that it is not your role to negotiate fees, but that you will disclose the client's financial need. Also, remind the client that you may need to share facts about their case with potential referral attorneys. Keep in mind that full scope cases are difficult to refer, so set realistic expectations for the client, and for yourself. (Note: Domestic relations cases are the most difficult to refer. See \*\* below for more.)

3.) Be creative. Some case types are harder to place than others, so think through the different referral types. Can you find an attorney to make a one-time appearance instead of full scope representation? Perhaps mediation is a more cost-effective option? Maybe a client can be prepped to represent himself through a 1 hour consultation with a subject matter expert? Would you be willing to make a one-time appearance under the guidance of an experienced referral attorney? (great option for protective orders)

4.) Prep our Referral Attorneys so they can make an informed decision. To make a referral or request a consultation for a client with an attorney or firm that is a member of our Attorney Referral Program, email the attorney a copy of the client's intake form along with the referral request form and a specific indication of the type of referral help being sought (i.e. free 1 hr. consultation, 20 minute phone call with client, reduced fee representation, entry of appearance, etc.) Be sure to write "Confidential" in the email subject line if making the request via email. Be sure to ask the referral attorney to keep the client's information private.

5.) Know when you've exhausted all options. Sometimes, it may be difficult to know when to stop looking for a referral attorney. If you've contacted all of the attorneys in our network, next try our referral partners.

If that does not work and your client is in VA, contact the [Virginia Poverty Law Center](http://www.google.com/url?q=http%253a%252f%252fwww.vplc.org%252ftopics%252fpractice-areas%252f&sa=d&sntz=1&usg=afrqezfcmgznve0dslvuzehu0kqboqopha) (http://www.vplc.org/topics/practice-areas/) who will brainstorm with you about other referral options, or give the client the number to the VA referral attorney service 866-534-5243.

If your client is in MD, contact the [Maryland Legal Aid Bureau](http://www.google.com/url?q=http%253a%252f%252fwww.mdlab.org%252fget-help-services)&sa=d&sntz=1&usg=afrqezeqr7aqiev-y7nhdwmlcvdawq76va) (http://www.mdlab.org/get-help-services). If one month has gone by without being able to make a successful referral, gently inform the client that you were unable to find a referral attorney and if appropriate, offer the client a follow-up clinic appointment to discuss pro se coaching.

*\*You should not make a pro bono referral for cases if any of the following facts are present:*

The client already spent tens of thousands of dollars on an attorney and has now come to Good Samaritan Advocates because they "ran out of money"

The client expresses unrealistic expectations for the outcome of the case, i.e. "I won't stop until I have full custody."

The client tends to speak incessantly about their situation, seems unwilling to listen to your advice, and/or seems unreasonably demanding

The client is not truly indigent. If there is a question as to your client's financial status, please ask for proof of income. If you are unsure about this, ask your clinic directors!

*\*\*Domestic relations cases are the most difficult to refer for a number of reasons:*

* It is often impossible for a referral attorney to know how much time and firm resources a case will take
* It is difficult to determine the veracity of a client's story without spending much time with the client
* It takes much time to determine the means and motivation of the opposing party
* The client may have unrealistic expectations due to the emotional nature of many family law cases

If, after completing the steps above, it is still unclear as to what course of follow up (if any) is appropriate, please first contact your Clinic Director for guidance. It may also be possible, in certain limited circumstances, to see if another Good Samaritan Advocates’ pro bono clinic attorney may be willing to help you represent your client.

**ABOUT REFERRAL ATTORNEYS AND PROFESSIONALS**

Good Samaritan referral attorneys and other professionals are not required to sign our Statement of Faith. Before a client is referred, the client must have been seen and counseled by our pro bono clinic attorneys and volunteers at one of our Saturday morning legal clinics. Presumably, it is here that the requisite emotional, spiritual, or practical counsel has been administered and that any follow- up counsel in these areas has already been scheduled. It is also presumed that the pro bono clinic attorneys have already pinpointed the client’s specific legal issue or claim and that the referral is being made only to address that particular issue.

As per the Good Samaritan Referral Policy, referrals should only be made when a client’s matter requires specialized skill, presents a complicated legal question that requires follow-up outside the clinic by an attorney with specialized knowledge, *and the client cannot represent him/herself or perform the task himself.* The referral attorney or professional is only required to address the client’s particular legal or quasi-legal issue. No emotional or spiritual counsel is required or expected of the referral attorney or professional. It is for these reasons that our GSA referral attorneys and professionals are not required to sign our Statement of Faith.

**APPENDIX A – VOLUNTEER APPLICATION**

Name:

Address:

Phone: Email: Do you attend church?  Y / N

Name of church:

Name and contact of pastor or priest:

Do you believe and will you hereby subscribe to the Statement of Faith? Y / N

Do you have any ministry experience? (Bible study leader, church school teacher, seminary training, etc.) Y / N If yes, please describe:

1. *Bar Admission (for attorneys)*

 I am barred in Md.  I am barred in Va.

I am barred in another jurisdiction: Date of admission:

Have you ever volunteered with a legal aid organization? Y / N

If yes, where? Dates of service:

b. *I would like to assist in the following role(s):*

* **Clinic Attorney**: I am a member in good standing of a bar of any jurisdiction and a member or parishioner in good standing of a local church willing to serve as an attorney for our low income clients. I am available to serve at the following legal clinic(s):

|  |  |  |
| --- | --- | --- |
| **☐** Montgomery County, MD | **☐** Loudoun County, VA | **☐** Fairfax County, VA |
| Good Samaritan Advocates at  Covenant Life Church  *Legal clinic is held on the 2nd Saturday of each month, 9AM to 1:00 PM.* | Good Samaritan Advocates at  Reston Bible Church  *Legal clinic is held on the3rd Saturday of each month, 9AM to 1:00 PM.* | Good Samaritan Advocates at  Columbia Baptist Crossroads  *Legal clinic is held on the 4th Saturday of each month, 9AM to 1:00PM.* |

 **☐ Referral Attorney**: I am a practicing attorney and bar member in good standing willing to accept occasional pro bono or reduced fee referrals from Good Samaritan Advocates on legal matters within my experience and competence, which include the following (please check or circle):

|  |  |  |
| --- | --- | --- |
|  Bankruptcy |  Contracts |  Civil/Human Rights |
|  Civil Litigation (general) |  Consumer Law |  Criminal & Prisoner Advocacy |
|  Debtor/Creditor |  Disability Law |  Elder Law |
|  Employment Law |  Family Law |  Guardianship |
|  Housing; Landlord/Tenant |  Immigration |  Juvenile Law |
|  Public Benefits, SS, SSI |  Wills, Trusts & Estates |  Other: |

 **☐** **Legal Researcher**: I am a lawyer, law student, or paralegal with good legal research skills willing to accept occasional topic assignments to assist a lead pro bono attorney with a client’s legal matter.

 **☐ Other**: I am a member or parishioner in good standing of a local church. I have the following experience or skills, and/or would like to contribute in the following manner (ex., paralegal, IT, hospitality etc):

c. *Professional Liability: (for attorneys)*

Good Samaritan Advocates carries professional liability insurance for all our pro bono attorneys. Please answer the following questions as accurately as possible:

(a) Have you been the subject of a disciplinary complaint or refused admission to practice, disbarred, suspended, reprimanded, sanctioned, or held in contempt by any court, administrative agency, or regulatory body in the past 24 months? Y / N

(b) Has any professional claim or suit been made against you in the past 24 months? Y / N

(c) To the best of your knowledge, are you aware of any circumstances, acts, errors, or omissions that could give rise to a professional liability claim against you? Y / N

*\*If you answered “yes” to any of the questions in this section, please provide an explanation:*

Signature of Volunteer Applicant Date

Printed Name:

**APPENDIX B – STATEMENT OF FAITH**

Trusting in Jesus Christ as my Savior, I believe in:

1. One God, eternally existent in three persons, Father, Son and Holy Spirit;

2. God the Father Almighty, Maker of heaven and earth;

3. The Deity of our Lord, Jesus Christ, God’s only Son, conceived of the Holy Spirit, born of the Virgin Mary; His vicarious death for our sins through which we receive eternal life; His bodily resurrection and personal return;

4. The presence and power of the Holy Spirit in the work of regeneration; and

5. The Bible as the inspired Word of God.

I fully subscribe to this Statement of Faith, in its entirety, and without mental reservation, and seek to live fully in accordance with this Statement, in obedience to Christ and His Word, by His grace. I agree to inform the Directors of Good Samaritan Advocates if, at any time during my participation in the Christian Legal Aid program, I can no longer fully subscribe to or seek to live in accordance with this Statement of Faith.

Signature of Volunteer Date

Printed Name:

**note**: *Pro Bono Clinic Volunteers – General and Holistic Counsel*

Good Samaritan Advocates is first and foremost a Christian ministry. Although our primary service is legal counsel, it is motivated by Jesus’ calling to show God’s love to our neighbors. Therefore, all volunteers wishing to serve at our Saturday morning legal clinics are required to sign our Statement of Faith. Our pro bono clinic attorneys and volunteers provide general and holistic counsel, which may include emotional, spiritual, and/or practical guidance on a variety of issues. Additionally, because the legal clinic is the client’s first interaction with our organization, it is important that all volunteers share the same, core religious beliefs and faith principles so that Christ-centered counsel can be provided when appropriate.

**APPENDIX C – CONFIDENTIALITY POLICY**

As an organization providing legal services to clients, Good Samaritan Advocates (GSA) is obligated to avoid improper disclosure or misuse of confidential client information. This includes the identity of clients and all client information.

This obligation is imposed by canons of legal ethics, Virginia Rules of Professional Conduct, Maryland Rules of Professional Conduct, and by our own ethical standards. All volunteer attorneys, staff, and board members are obligated to comply with this Confidentiality Policy.

No one outside GSA (including your family and friends) is authorized to receive any confidential client information concerning a client unless the client has specifically authorized disclosure of specific information and the responsible attorney has approved. Since it is not always possible to know what information should be treated as confidential, please do not discuss any client matters with persons outside of GSA, unless specifically and clearly authorized to do so by the attorney in charge.

Your username and password to the GSA Google Docs site should be kept private and confidential so no one outside of GSA can access client files.

We thank you for your service to GSA and for your help in protecting the confidentiality of our clients’ information.

Signature of Volunteer Date

Printed Name:

**APPENDIX D – CLIENT REFERRAL FORM**

Client Name:

Client Telephone number: Email:

Referral requested by:

GSA Volunteer Telephone: Email:

|  |
| --- |
| Description of client’s legal issue: |

Client’s Objective:

|  |
| --- |
|  |

Any special deadlines or hearing dates?

If yes, which court or agency and when?

This referral request will be sent to:

Good Samaritan Referral attorney name or organization Date:

*For office use only*

|  |
| --- |
| Based on the information above, this referral request has been accepted/denied.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Good Samaritan Clinic Director Date  Director Notes: |

**APPENDIX E – Client Advice Form**

***Client Priority Steps:***

1. First Priority Step:  
   Guidance:

2. Next Priority Step:  
Guidance:

3. Next Priority Step:   
Guidance:

***Pro Bono Attorney(s) Next Steps (If any):***

Pro Bono Attorney: Contact Information:

Pro Bono Attorney: Contact Information:

*Client acknowledgment:*

I understand that the service(s) the pro bono attorney agreed to provide to me outside the Good Samaritan Advocates legal clinic setting is limited only to the tasks stated in the Client Advice Form. **The pro bono attorney is not representing me in court or in any manner beyond the limited scope as stated on this Form unless I enter into a separate retainer agreement with Good Samaritan Advocates.** I understand that the pro bono attorney is not obligated to provide help to me that is not set forth in the Client Advice Form.

I understand that should I go to court for this legal issue, I should disclose the assistance provided by the pro bono attorney to the court.

Client Signature Date

Client Name (Printed):

*“Do not be anxious about anything, but in every situation, by prayer and petition, with thanksgiving, present your requests to God. And the peace of God, which transcends all understanding, will guard your hearts and your minds in Christ Jesus.” Philippians 4:6-7*

**APPENDIX F – BENEVOLENCE APPLICATION**

The Good Samaritan Advocates Benevolence Fund provides one-time or short-term emergency financial assistance to clients of Good Samaritan Advocates. The Fund is made known only to GSA volunteers and is considered in situations of serious or sudden client financial difficulty. Funding decisions are at the discretion of the Executive Director and/or Board of Directors. Amounts will be determined on a case-by-case basis, not to exceed $1,000.

Client name:   
Client address:   
Date of request:   
Amount of assistance requested: Date funding needed:

To whom/where will the funding be sent?   
General purpose for which the assistance is requested:

Is the requested financial assistance in connection with pending or contemplated litigation? Y / N

How does the client’s need affect his or her livelihood, i.e. food, shelter, employment?

Why the need is urgent and not an "ordinary expense." Complete description of the assistance:

*To be completed by the Executive Director:*

Application is: accepted denied

Reason(s) for acceptance/rejection of the request:

Is there any relationship between the recipient and officers, directors, or key employees of or substantial contributors to the organization? Y/N If so, explain:

**APPENDIX G**

VA Bar Professional Guidelines Rule 1.8 - Conflict of Interest: Prohibited Transactions

(a) A lawyer shall not enter into a business transaction with a client or knowingly acquire an ownership, possessory, security or other pecuniary interest adverse to a client unless:

(1) the transaction and terms on which the lawyer acquires the interest are fair and reasonable to the client and are fully disclosed and transmitted in writing to the client in a manner which can be reasonably understood by the client;

(2) the client is given a reasonable opportunity to seek the advice of independent counsel in the transaction; and

(3) the client consents in writing thereto.

(b) A lawyer shall not use information relating to representation of a client for the advantage of the   
lawyer or of a third person or to the disadvantage of the client unless the client consents after   
consultation, except as permitted or required by Rule 1.6 or Rule 3.3.

(c) A lawyer shall not solicit, for himself or a person related to the lawyer, any substantial gift from a  
client including a testamentary gift. A lawyer shall not accept any such gift if solicited at his request by a third party. A lawyer shall not prepare an instrument giving the lawyer or a person related to the lawyer any substantial gift from a client, including a testamentary gift, unless the lawyer or other recipient of the gift is related to the client. For purposes of this paragraph, a person related to a lawyer includes a spouse, child, grandchild, parent, or other relative or individual with whom the lawyer or the client maintains a close, familial relationship.

(d) Prior to the conclusion of all aspects of a matter giving rise to the representation of a client, a lawyer shall not make or negotiate an agreement giving the lawyer literary or media rights to a portrayal or account based in substantial part on information relating to the representation.

(e) A lawyer shall not provide financial assistance to a client in connection with pending or contemplated litigation, except that:

(1) a lawyer may advance court costs and expenses of litigation, provided the client remains ultimately liable for such costs and expenses; and

(2) a lawyer representing an indigent client may pay court costs and expenses of litigation on behalf of the client.

(f) A lawyer shall not accept compensation for representing a client from one other than the client unless:

(1)the client consents after consultation;

(2) there is no interference with the lawyer's independence of professional judgment or with the client- lawyer relationship; and

(3) information relating to representation of a client is protected as required by Rule 1.6.

(g) A lawyer who represents two or more clients shall not participate in making an aggregate   
settlement of the claims of or against the clients, or in a criminal case an aggregated agreement as to guilty or *nolo contendere* pleas, unless each client consents after consultation, including disclosure of the existence and nature of all the claims or pleas involved and of the participation of each person in the settlement.

(h) A lawyer shall not make an agreement prospectively limiting the lawyer’s liability to a client for malpractice, except that a lawyer may make such an agreement with a client of which the lawyer is an employee as long as the client is independently represented in making the agreement.

(i) A lawyer related to another lawyer as parent, child, sibling or spouse, or who is intimately involved with another lawyer, shall not represent a client in a representation directly adverse to a person whom the lawyer knows is represented by the other lawyer except upon consent by the client after consultation regarding the relationship.

(j) A lawyer shall not acquire a proprietary interest in the cause of action or subject matter of litigation the lawyer is conducting for a client, except that the lawyer may:

(1) acquire a lien granted by law to secure the lawyer's fee or expenses; and  
(2) contract with a client for a reasonable contingent fee in a civil case, unless prohibited by Rule 1.5.(k) While lawyers are associated in a firm, none of them shall knowingly enter into any transaction or

perform any activity when one of them practicing alone would be prohibited from doing so by paragraphs (a), (b), (c), (d), (e), (f), (g), (h), or (j) of this Rule.

Md. Lawyer's R. Prof'l Conduct 1.8 - The Lawyer/Client Relationship (2012)

Rule 1.8. Conflict of Interest: Current Clients: Specific Rules.  
  
(a) A lawyer shall not enter into a business transaction with a client unless:

(1) the transaction and terms on which the lawyer acquires the interest are fair and reasonable to the client and are fully disclosed and transmitted in writing in a manner that can be reasonably understood by the client;

(2) the client is advised in writing of the desirability of seeking and is given a reasonable opportunity to seek the advice of independent legal counsel on the transaction; and

(3) the client gives informed consent, in a writing signed by the client, to the essential terms of the transaction and the lawyer's role in the transaction, including whether the lawyer is representing the client in the transaction.

(b) A lawyer shall not use information relating to representation of a client to the disadvantage of the client unless the client gives informed consent, except as permitted or required by these Rules.

(c) A lawyer shall not solicit any substantial gift from a client, including a testamentary gift, or prepare on behalf of a client an instrument giving the lawyer or a person related to the lawyer any substantial gift unless the lawyer or other recipient of the gift is related to the client. For purposes of this paragraph, related persons include a spouse, child, grandchild, parent, grandparent or other relative or individual with whom the lawyer or the client maintains a close, familial relationship.

(d) Prior to the conclusion of representation of a client, a lawyer shall not make or negotiate an agreement giving the lawyer literary or media rights to a portrayal or account based in substantial part on information relating to the representation.

(e) A lawyer shall not provide financial assistance to a client in connection with pending or contemplated litigation, except that:

(1) a lawyer may advance court costs and expenses of litigation, the repayment of which may be contingent on the outcome of the matter; and

(2) a lawyer representing an indigent client may pay court costs and expenses of litigation on behalf of the client.

(f) A lawyer shall not accept compensation for representing a client from one other than the client unless:

(1) the client gives informed consent;  
(2) there is no interference with the lawyer's independence of professional judgment or with the client-lawyer relationship; and  
(3) information relating to representation of a client is protected as required by Rule 1.6.

(g) A lawyer who represents two or more clients shall not participate in making an aggregate settlement of the claims of or against the clients, or in a criminal case an aggregated agreement as to guilty or *nolo contendere* pleas, unless each client gives informed consent, in a writing signed by the client or confirmed on the record before a tribunal. The lawyer's disclosure shall include the existence and nature of all the claims or pleas involved and of the participation of each person in the settlement.

(h) A lawyer shall not:

(1) make an agreement prospectively limiting the lawyer's liability to a client for malpractice unless the client is independently represented in making the agreement; or

(2) settle a claim or potential claim for such liability with an unrepresented client or former client unless that person is advised in writing of the desirability of seeking and is given a reasonable opportunity to seek the advice of independent legal counsel in connection therewith.

(i) A lawyer shall not acquire a proprietary interest in the cause of action or subject matter of litigation the lawyer is conducting for a client, except that the lawyer may:

(1) acquire a lien authorized by law to secure the lawyer's fee or expenses; and  
(2) subject to Rule 1.5, contract with a client for a reasonable contingent fee in a civil case.

(j) While lawyers are associated in a firm, a prohibition in the foregoing paragraphs (a) through (i) that applies to any one of them shall apply to all of them.

**APPENDIX H - ADDITIONAL INFORMATION**

Our website: [www.goodsamaritanadvocates.org](http://www.goodsamaritanadvocates.org)

Our intranet: <https://sites.google.com/a/cla-nova.org/docs-resources/>

Sign in to Good Samaritan Advocates services at: <http://www.google.com/a/cla-nova.org>

Important note for signing into GSA services for the first time:

If you sign into GSA services with your new email address, you must use the following suffix *instead of*@GSAdvocates.org:   **@**[cla-nova.org](http://cla-nova.org/)

The reason is because our Intranet is powered by Google through a special nonprofit program.  When we applied for this program back in 2010, we went by the name Christian Legal Aid of Northern Virginia, or cla-nova.  So, cla-nova is our Google domain name. This cannot be changed.

However, there is a quick and easy way to make the @[gsadvocates.org](http://gsadvocates.org/) email your "default address."   The directions are at the bottom of the landing page of our Intranet, a pdf file called "email instructions."  <https://sites.google.com/a/cla-nova.org/docs-resources/>   If you think you will utilize your @[gsadvocates.org](http://gsadvocates.org/) email address, please make this change.