



Legal Aid Services Management Course: Eligibility, Intake, Pro Bono Panels and Access to Justice

16 – 20 August 2027

Barcelona - Eixample district four-star



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Introduction:

Legal aid services management, covering eligibility, intake, pro bono panels and access to justice, is a 1-week course for managers in legal aid associations, bar body committees and justice ministry units that ends with a Legal Aid Service Delivery Plan for a case organisation. Schemes turn away eligible applicants, overload panel lawyers and cannot show funders results when means tests, triage rules and quality reviews are informal. Nominees already supervise intake, advice or panel casework and learn through case study on anonymised application files, advice line logs and assignment records. CoreConcept Training Center delivers this legal aid services management course.

Course Objectives:

- Map legal aid delivery models, from salaried staff lawyers and judicare panels to clinics and advice lines, against unmet legal need in a service area
- Apply means and merits tests through a written eligibility policy, contribution bands and a recorded decision with review rights
- Run intake triage that routes each applicant to legal information, brief advice, assisted self-help or full representation
- Recruit, assign and supervise pro bono and panel lawyers using matching rules, caseload limits and conflict checks
- Review case quality through file audits, peer review, client feedback and complaint handling, and act on the findings
- Cost legal aid services by unit of service and report access-to-justice outcomes to funders and boards

Target Audience:

- Managers responsible for the daily running of legal aid associations and legal aid units
 - Supervisors in charge of intake desks, legal advice lines and online enquiry channels
 - Coordinators who recruit and manage pro bono and paid panel lawyers for bar bodies and associations
 - Quality and supervision leads who audit legal aid files and handle client complaints
 - Funding, planning and reporting officers who prepare legal aid budgets and outcome reports
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Course Outline:

Day 1: Legal Aid Landscape, Delivery Models and Service Baseline

- UN Principles and Guidelines on Legal Aid Core Commitments
- Salaried, Judicare, Clinic and Pro Bono Delivery Models Compared
- Legal Information, Brief Advice and Representation Service Ladder
- Unmet Legal Need Mapping by Problem Type and Population
- Service Baseline Review Using Recent Application and Closure Data

Day 2: Eligibility Policy, Means Testing and Merits Assessment

- Means Test Design With Income, Asset and Household Rules
- Contribution Bands and Fee Waiver Criteria for Partial Eligibility
- Merits and Interests of Justice Test Scoring Sheet
- Priority Groups and Emergency Eligibility Fast-Track Rules
- Refusal Letter, Review Request and Eligibility Appeal Procedure

Day 3: Intake Triage, Advice Lines and Pro Bono Panel Operations

- Intake Triage Script With Legal Problem Classification Codes
- Telephone and Online Advice Line Call Handling Standards
- Pro Bono Panel Recruitment Pack and Lawyer Expertise Register
- Case Assignment Matching Rules With Caseload Caps
- Conflict of Interest Check and Panel Lawyer Supervision Log

Day 4: Case Quality Review, Funding Models and Impact Measurement

- UN Legal Aid Quality Handbook Peer Review Approach
- Legal Aid File Audit Checklist and Remediation Tracker
- Client Feedback Survey and Complaint Resolution Workflow
- Unit Cost per Service Calculation and Funding Mix Options
- SDG 16 Access to Justice Indicators and Legal Needs Surveys

Day 5: Case Study on a Legal Aid Service Delivery Plan

- Case Legal Aid Association Brief With Demand and Budget Data
 - Eligibility Decisions on Sampled Applicant Files
 - Triage Routing and Panel Assignment for Case Matters
 - Quality Review Findings and Outcome Indicator Selection
 - Legal Aid Service Delivery Plan Completion and Peer Challenge
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Skills You Will Gain:

- Means Test Design
- Merits Assessment
- Intake Triage Routing
- Advice Line Supervision
- Panel Lawyer Matching
- Legal Aid File Audit
- Unit Cost Analysis
- Access to Justice Indicators

Why Attend This Course:

- Deliver a Legal Aid Service Delivery Plan for a case organisation to the director of the legal aid association or unit and its funders
- Decide which applicants qualify, which service level each problem receives and which panel lawyer takes each case, on recorded criteria
- Avoid wrongful refusals, overloaded volunteers, poor-quality files and funding gaps that weaken a legal aid scheme
- Pass on the means test form, triage script, panel register and file audit checklist to intake staff and coordinators

Conclusion:

Back at work, the participant hands the director of the legal aid association or unit a Legal Aid Service Delivery Plan that sets eligibility rules, triage routes, panel assignment practice, quality review cycles and outcome indicators. The director and board use it to agree service priorities, approve budgets and brief funders, while coordinators use its registers and checklists in daily casework. After the first quarter under the plan, the organisation should compare refusal rates, waiting times, file audit scores and client feedback with the plan and adjust thresholds where needed.

Frequently Asked Questions FAQ:

What should participants know before a legal aid services management course?

Participants should already supervise intake, advice, panel or quality work in a legal aid setting. No accounting background is needed. Bringing an anonymised application form, an advice line log or a panel assignment list helps them apply the case study exercises.

How does legal aid services management differ from an in-house legal department or victim support course?

It covers running a public-facing legal aid scheme: eligibility tests, triage, advice lines, pro bono panels, quality review and funding. In-house legal department courses serve one employer, and victim support courses focus on care for victims and witnesses rather than legal representation.

Why do legal aid services management teams use means and merits tests?

Means and merits tests direct limited funds to people who cannot pay and whose matters justify help. Written tests make decisions consistent between officers, give applicants a basis to request review and give funders evidence that resources reach priority cases.

What do participants take back from a legal aid services management course?

Participants take back a Legal Aid Service Delivery Plan with a means test form, a merits scoring sheet, an intake triage script, a panel lawyer register, a file audit checklist and a set of access to justice outcome indicators.
