

Components of a Successful Office -- Best Practices List  
Revised April 5, 2007

The Quality Assurance Task Force (QATF), an advisory group formed to assist the Executive Director of the Office of Public Defense Services in monitoring and improving the quality of public defense services in Oregon, has identified the following list of policies and practices. The QATF recommends these practices as a result of its principle work of advising the Executive Director on the conduct of peer-reviewed evaluations of public defense providers. The list, which continues to evolve as the site review process continues to identify policies and practices in use around the state that can be recommended to other providers, is neither a comprehensive description of a successful public defense provider management plan nor a recommendation for an inflexible “one-size-fits-all” plan. Rather, these are current practices that the QATF has identified as contributing to the achievement of excellence in public defense practice.

1. Policy of zealous advocacy. A contractor should develop and maintain a client-focused practice. Zealous advocacy requires that the contractor have attorneys present at all court hearings including arraignments and shelter hearings. It also requires immediate and continuing contact with all clients, including child clients, and a plan for meeting the needs of non-English speaking clients.
2. Board or advisory group. For consortia and public defender offices, a regularly meeting board of directors or advisory group with at least some independent members who are not employed by the contractor.
3. A business or strategic plan developed and regularly updated by the contractor’s managers and subject to review by its board of directors or advisory group. The plan should include a formal process for recruiting and training new attorneys, a succession plan for managers, and an affirmative action plan.
4. Evaluation of management. Public defender offices and consortia should have a management assessment process that includes an annual evaluation of the executive manager, an evaluation of office management processes, and a review of the operations by the board of directors or advisory group. Law firms should have a process for obtaining feedback on the performance of firm management.
5. Professionally acceptable law office management policies and procedures including an employee manual; an office procedure manual; a case file maintenance procedure for creating, maintaining and closing files, calendaring appearances, and retaining records and case notes; and a system for collecting and using management data<sup>1</sup>.
6. Modern, professional-quality law office space, technology and equipment. In addition to maintaining a work environment that safeguards the health, safety and comfort of employees, instills pride and confidence in the work performed there, and promotes

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<sup>1</sup> At a minimum this data should include for each case: the date of intake, the name of the assigned attorney, current status and final outcome.

efficient and productive work among attorneys and support staff, attorneys should have access to current reference materials and manuals and online legal research services.

7. Case management. A case assignment system which takes into account the qualifications, experience and workload of each attorney, a conflict identification system which identifies conflicts at the earliest opportunity, a case monitoring system which tracks the number and type of cases assigned to each attorney and a resource management plan for handling the assigned caseload.
8. Compensation and Advancement. A fair and rational compensation system and a fair and rational system for advancement from minor cases to more serious and complex ones.
9. Training and evaluation. An orientation process for new employees; a training manual and mentoring plan for new attorneys; regular training for lawyers, investigators and legal assistants; regular and consistent written performance evaluations of the contractor's attorneys (at least every two years).
10. A method of obtaining client input regarding the quality and responsiveness of the contractor's legal services and a process for resolving complaints about the performance and conduct of the contractor's attorneys and staff.
11. Involvement in the legal system of the county and the community at large.