

YOUNGSTOWN STATE UNIVERSITY

ORAL HISTORY PROGRAM

Northeast Ohio Legal Services

Personal Experience

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JANET WEISBERG

Interviewed

by

James Callen

on

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C This is an interview with Janet Weisberg for the Youngstown State University Oral History Program on Northeast Ohio Legal Services, by James Callen, at 700 Metropolitan Tower, Youngstown, Ohio, on April 1, 1992, at 3 30 pm

Janet, could you describe a little bit of your background prior to coming to Legal Services, where you were born, where you went to school and so on?

W I was born in Pittsburgh, Pennsylvania and grew up in the suburbs there, went to college at the University of Pittsburgh there and ended up with a major in Secondary Education in Social Studies. After a very brief teaching experience, I was offered a job with the Social Security Administration. I was with them for about five years. At that time, I got married and we made a move to Kentucky and at that time, I decided that I really did want a career change. I went back to school and went to Marshall University down in Huntington, West Virginia in their MBA program and at that same time, I decided to study accounting with the goal of taking the exam, which I did and successfully sat for the exam and became a CPA. We then moved back up to Pennsylvania and in 1984, I started working for a CPA firm in Youngstown. We ended up moving to Youngstown in 1984 from New Castle Pennsylvania, about thirty miles away. We had moved to Youngstown, I started shopping at the local food co-op. My name came up in conversation to an attorney at Legal Services, who was working with some women who wanted to start a worker-owned co-op and they were looking for someone to help them with some financial planning. The manager of the co-op said she knew me, passed my name on and that is when I met Pat Rosenthal. I worked with her in 1985 and at that same time, my predecessor left the organization here. The position became open and I applied for it and got it.

C What does your job as financial director entail?

W At that time, my predecessor's job was conceived in a different way, more of a program administrator, responsible for budgeting and administration of the program. At the time I was hired, the one thing that was attractive to me, is that there is an added component to the job. One, the job is seen not only as being responsible for the financial administration of the program, which would include overseeing its own business of receiving monies, paying bills, things of that nature, budgeting, requests for money, making sure that we have the income so that NOLS can do the work that it wants to do. But there was an added component for me as long as I have been here. There had been an aspect of being involved in actual cases and doing client work along areas of organization development and financial planning. So I have juggled that for about seven years now. The attorneys have seen the need there and I have an interest in it. I think that is a reflection on the kind of agency it is. I think there are probably few non-profits that are involved in the actual operations of organizational

development

- C You say you have worked with clients. Can you describe the type of clients that you have worked with and the type of service that you have provided?
- W. I generally have gotten involved with more organization kind of clients, although on occasion there is specific numbers crunching that I can do to help an attorney. That is a real discreet type of task. The kinds of things I tend to do are with the group clients that are people who approach our organization and want to set up an organization to address some need in the community. We are representing them as a group. I usually deal with some aspects of organizational development for them, financial planning, doing things to help them deal with tax exemption status. I guess I am doing some similar things that I do for NOLS in the area of the budgeting and financial planning.
- C. You mentioned that unlike other non-profits that you know of, you have had this opportunity at NOLS. Is there anything else that distinguishes Northeast Ohio Legal Services from other non-profits that you have worked with in terms of their operations, their management?
- W Yes. There is no doubt in my mind that one of the significant aspects at NOLS's . I do not know if it is a management philosophy, it is probably more, as other employees have put it, "A cultural philosophy, or an organizational one". It does not center around as much as the work that is being done but by how the employees help determine the way the work is done. The mission of NOLS is pretty clear cut in that there is no disagreement or argument about it but there is probably a lot of ways to get to that end. There is no doubt that in most non-profits, staff does not have as much of an opportunity to help determine the means with which the end is achieved. I think that is very unusual. I think that is one of the reasons for the tenure of people within the organization, and for the success of the organization. That is one reason for what I consider the people have more decision-making abilities things because there is much more of a feeling of having helped make the decisions. I think that has been a tone that I have known whether it is deciding on what particular cases the organization may take or not take. I think it goes further than that in dealing with even financial issues. When monies are not available or monies are available for things, I think people have more decision-making abilities. I do not see that in other places.
- C Can you think of any specific examples where that has worked successfully or may not have been so successful?
- W I think the best example that I am really familiar with, that was even before my time, but that is part of the financial history I became aware of, was back in 1981,

when Reagan came on, and Legal Service programs actually had cut backs in funds. This organization I think got about 20 % decrease in funding which is significant enough to really affect what is going to happen. My understanding is that staff as a group met and discussions were held, suggestions were made as to how we should do this. Do you just lay off the last few people hired and then everyone else stays on? The decision that was made here that actually happened was, I believe, the attorneys went on part-time status for four days a week, keeping all the support staff at a full-time rate, and probably some other belt tightening issues, but just the fact that it was staff that came up with the idea that was accepted and that it was not on the basis of seniority that there was some component that was perceived as need. It was just perceived that those who received the least amount of money, which tended to be the support staff were those who could least afford to lose some of that money and go into a part time status, and those who could most afford it, took the cut at that time. So I think that is an example of what worked well. Where it does not work well, I think examples of that. It is difficult to think of particular examples. I think there is a lot of small issues where trying to please everyone so to speak, have a consensus about what should be done, becomes very difficult and unwieldy and lengthy. It probably works best when the organization is most threatened, like with financial cut backs, of when everyone perceives a problem to exist. That is when since there is a history of everyone trying to work together, it is much easier for people to tighten the belts, more so than in other organizations. Although I do not think NOLS should be painted out to be some heroic, unselfish kind of group of people. The people are human, everyone, on some respect, is looking out for their own individual needs, but I think there is a strong thread of a group concern that does not exist in other organizations.

C Could you describe a little bit about how that process works with making specific expenditures, like purchasing equipment?

W Yes. It can be purchasing equipment, it can be dealing with the budget. Generally, the management of the organization, the director, and myself, maybe start the ball rolling with thoughts of "what do we need?" We need computers, we need telephones, we need whatever we would need in an office and those who would be involved in it are contacted. A large purchase ends up budgeted and staff becomes aware of the budget and has input on whether or not they think we should put a certain amount of money into some general areas. It is not a matter of people wanting to get involved in a certain kind of thing, but there certainly is a staff consensus on the fact that you would want to update equipment needs and so then, that is a mandate, we put aside so many dollars to do that and it is done. So while it is being done over the course of the year, staff is not surprised to see equipment come in and where appropriate, they are asked to look at it, to give input on it. It makes for some of the underlying

premises as far as the management of the organization deals with people most affected by decisions help make them. You are buying a computer, you make sure the person sitting behind it has some say in it. Otherwise you are just looking for problems.

C. Do you think on the whole it leads to better decision making?

W. I think on the whole it does lead to better decision making. The minus on it is the time involved to come to some decisions. When time is of the essence, that is when it does not lead to better decision making, if you have lost opinions because of the length of time that is needed. I think that process of making decisions has served this organization well because there have been few times where speed in decision making is important, at least from a financial point of view.

C. Over the time that you have worked with Northeast Ohio Legal Services, what made your changes on funding and budgeting?

W. Well, probably one of the easiest ones which make budgeting just an enjoyable task to deal with the influx of money in state funding. I came in May, the first check of \$100,000 came here in July, and I did not have to do anything to get it. It came in the mail one day. The state funding which now is about 1/3 of the budget of NOLS is no doubt in my mind the biggest change in budgeting. What that has done is it has made the organization less dependent on smaller sources of funding, which does not mean that we do not still get them and go after them and use them, but it has given us some more independence on dealing with things that we do and how we do it. I think it has also given us some more flexibility in viewing our major funding from the Legal Services Corporation. Prior to the receipt of state funding, if something did not meet the criteria of Legal Services, it was not done here. With the influx of up to 1/3 the monies from another source that permits things that other funding does not permit. I think it gives the organization more flexibility and so helps you deal with that fund in a different way, also.

S. It has the level of funding changed during the time you have been here?

W. It has dramatically increased. It has just gone up. It almost doubled. I think since 1985, I think when I first came the whole program was about a \$600,000 program and we have been over \$1 million now for a couple of years. With that level has come growth and I think it has problems. I think now we are experiencing some of those problems of spatial growth, physically in our office.

C. Have there been any changes in NOLS' relationship with the funding?

sources?

W. Yes Even over it is history, when I came on at one time there was a lot more reliance on some of the funders in Trumbull County I think that was due to throw backs of Trumbull County Legal Aid. Through that organization, the predecessors to NOLS and Trumbull County had it is own relationships in funding in that county and when NOLS came along, NOLS absorbed some of that They absorbed the funders, they took them on and over the years, some of the relationships with some of those funders have changed Basically, those funders have become mush less significant. So in that respect, I think NOLS had become a lot more of a regional organization as opposed to being entirely county focused I think its ability to count as its funding sources those that cover its whole region has contributed to that It does not approach the physical area for parceling out service in some way It is able to be more regional I think because its funding is more regional, it lets its focus on problems a little bit in that way So we can view problems in a more systematic way Try to deal with underlying problems rather than just dealing with particular problems that deal with particular people's needs I am not trying to say that I think that funding has pulled the organization into dealing with systemic kinds of problems but I think the fact that it has broad based funding that just covers an entire area has helped so that it can do that I do not think it is cause and effect but I think that has been helpful So that the administration of the program does not have to focus on, "Are we delivering enough service in this one county or that one county" but it can focus on resolving a certain kind of problem An example of that, although it happened before I was here, the issue with the mills I think all the mills were located in Mahoning County A tremendous amount of resources, you could say, were poured into that one county but because our funding covers all four, we did not have to answer to a funder in Columbiana County saying, "We are using your dollars for another county " So I think that has helped this organization broaden it is views

C How have the day to day operations of managing NOLS changed with the changes in technology, particularly?

W. I think NOLS is fortunate, because 25 years after it started the original bookkeeper's still on site working So in that respect, from the financial point of view, although records have been stored and moved here and there we have a living memory of things that happened in the past which on occasion has been very helpful in putting some things together We have gone from being an organization that was run with a bookkeeper who was responsible for everything to an organization like most others with an automated accounting system I do not think it is a typical of organizations. It probably is not the typical nonprofit organization We are

certainly on the financial side much more organized than many non-profit and a lot of that credit has to deal with the financial assistant that started off here as a bookkeeper kind of person that is still at her job Those organizational skills on the financial record keeping do not exist in other non-profits and we have had that verified year after year, by our auditors Probably also getting federal funds and having audits has helped us a lot Those two features have helped make us more atypical We are a lot more sophisticated about what we do and on the financial side, that is not because it has been an organization of attorneys I do not think that is what is pushing the administration on the financial side I think it is a willingness of the organization, even though it is non-profit to put enough resources into that financial side Most other non-profits short that side, it is like, "Let us get our money and push it into things that help the client," because that is our mission Our mission is to help them Most do not see that by controlling and budgeting and administering your money, it is as much help to the client because you are making sure your resources are utilized They do not view it that way They are too busy trying to shovel the money out the door to clients in some way of service So I guess, in that respect that is where we are different

C How has technology impacted the day to day operations?

W In some respects, very little What we are doing now, we are doing with computers instead of paper The fact that somebody is using data entry onto a computer versus typing up a check is a trade off. I think the same is true of typists here typing on a typewriter versus a word processing program You have still got that time into that, I think where it is affected day to day is people are able to be more efficient and a little bit more creative. People are able to do more in the same amount of time, or they are able to do more routine tasks a little bit quicker On the management side, what we are able to do is have information at our fingertips We can save time looking up things, specifically I do not think it has changed financially Instead of writing things down on paper we are typing them into a computer On a fiscal side, program wise, technology probably is helping to cut down a lot of barriers between support staff and professional staff as attorneys become more and more their own typists so to speak. The idea that people that type must not be able to do so much else starts to "bite the dust" I think that is helpful That is helpful because it also them frees up those people who just did type and lets them have an opportunity to utilize some other skills in other areas I think it is starting to break down some of those barriers which this organization has always had an interest in trying to do but the lack of the technology to do it is hindering. Fifteen years ago we would have done that but the

reality was there were typewriters and, briefs needed to be typed, they needed to be typed quickly . People who could type sixty words per minute because they needed people that could type quickly. Now with automation, tools, you need someone who can peak a little bit, but if they are willing to make the right changes, you can just generate the same information without having such stringent requirements on what someone's capabilities are.

C During your years at NOLS, what have been some of the major difficulties in planning your budgets?

W I hesitate to answer only because the staff and board have always been impressed with how well our budgets work and what it is. There have not been many difficulties to really speak of The issue being coming in seven years ago and every year, having NOLS see, at a minimum, \$40,000 or \$50,000 more dollars makes budgeting much easier whether we allocated into staff amounts, equipment needs I do not want to belittle the budgeting process and the time that it takes to do that but this organization has not had to deal with tremendously difficult issues The biggest issue for us is like with everyone else today Probably the biggest issue is the constant increase in fringe benefit costs that is just killing everyone We have not had those cutbacks that they had in 1981, where people took cut backs of 20% So in that respect, I have always said to people, since I have come on, financially we have been on a gravy train We have doubled our budget and that is not due to any specific fund raising I have had to do in particular So I think really, there has not been a problem The biggest fuss was probably the passage of SB 219 that established that fund That, I think happened, there is no doubt in my mind that the former director here had a lot to do with that. He served this place well

C In terms of the fringe benefits, what have been the major problems, as far as increased are concerned?

W Our major problems are the same with what is going on in the general public; health insurance benefits Health insurance costs go up 25%, 30%, 40%, 50% every year and like everyone else at some point, the organization is going to have to say, "We cannot deal with that " We hope we can out pace the general public so that something is done to deal with it on a nationwide basis before organizationally we have to respond in a negative way I think overall I would have to say the board has been very supportive of the organization budgetarily which again is unusual in non-profits I do not know if that is because of the nature of the board being composed mostly of attorneys or not, but it has always

been clear to me that they have relied upon staff to perform those activities and not try to micro-manage the organization financially.

C. Looking back over the time you have been here, have there been any changes that you would liked to have seen instituted in the financial area?

W. I guess I would have to say no. Again, a lot of credit due to the first bookkeeper in making sure systems were well thought of and planned. It is not a difficult organization in which to do financial work. It is busy, there is the work that has to be done but I do not think there is anything to change that would be very critical. Probably, the biggest change was right as I came on so that does not speak to me as a change. In retrospect, I would have to say that was a big change in how the financial aspect of the organization was done. When I came on, that happened the week that I started. So I had a difficult time appreciating that change but our staff, other than the financial assistant who was here, commented to me over the years of how that has changed financial operations of the organization. I think most have said they find the change has been helpful.

C. What is a typical work day like for you?

W. A typical work day is one in which I do not get done what I started off thinking I was going to do. I think that is everyone's typical work day. It probably has to deal with, on a large part, self directing, responding to whether the monthly report needs done, whether it is thinking about the budget for the next year that is going to be due in another month, some of the housekeeping that we have to do that our funders require. That probably takes up about 1/3 of my time. I think another third of my time is taken up with case issues that I deal with, with organizations that I am involved with that we have as clients. I think the rest of the time is spent, a large part of it is sometimes spent dealing with computer issues here and I think catch all administration issues. I learned very quickly here that when you are in administration, those are the people that get to clean out the coffee room and make the coffee. Those are the people that have to do the things that no one else has to do because they are too busy doing their work. So I think a lot of tasks that are not integral to dealing with clients gets shuffled off onto the management.

C. Is there anything else that you think is important to add that we have not covered?

W. No, I do not think there is anything to add. I guess the only thought that I am left with is putting aside the work that we do. We are the only Legal Service in this area, so it is not like there is another one that could be better than we. We are the only people that do it. But thinking about this company, organizationally, it is

clear that the kind of management style and direction that this organization is used for, all the time that I have been here and probably before I was here, is not common in this area, if it is common anywhere. So I think, and even as much as we may be helping clients deal with all kinds of issues and dealing with systemic problems in this community, I think in a certain way, we as employees are dealing with some systemic change in the workplace. In the relationships between people that work together, in the way decisions are made in the workplace amongst the staff trying to use some more nontraditional methods of making decisions. I think that is an important that this organization does and I think it is a reason to a lot of it's success on the client-end of things and in servicing the community.

C There is one additional question that I wanted to ask. The major funder for NOLS is the National Services Corporation. One of the conditions of receiving the funding is that NOLS be monitored at least once each year.

W Once every 24 months.

C Once every 24 months? Could you give some impression of the monitoring visits that have taken place during the time you have worked at NOLS?

W I have been through four, a few. I think the monitoring process has some inherent difficulties. One has to do with having outside people who generally have not worked with Legal Services, having to make a determination as to what is going on. That is a problem. It is a problem with having outsiders who may not have been each other and having to work together. In my realm I have not found them to be overall particularly helpful in trying to improve what we do. There have been occasions that due to the short time that they are here, they are not able to have an understanding of the breath and depth needed in order to come up with other solutions to problems we have. The extensiveness of the monitoring is certainly more than what many funders do. There is no mistake about that. Most of the time that I have been here, the relationship with the major funder has had a slight adversarial tone which makes the monitoring visits difficult. Whether there is some improvement in the future. I know that has not been true for the whole time Legal Services has existed. At a stage for a number of years, the major funder was quite supportive of and assisted what was done with changes in politics in D.C. that changed the focus for a number of years into more of an adversarial situation. I think that is improving slightly but I think the long time period in which it was adversarial makes that improvement go at a slow pace. Do I wish that we did not have monitoring visits? Of course I do. I wish that we would just get checks and let us decide what we wanted to do with it and just have the checks continue. That is not the real world. When people or organizations give you money it is with some expectations. So in dealing with

those expectations, there is a price to be paid for everything. I think we use fewer resources in receiving monies from public sources than we would if we had to literally go out and raise funds. If we had to fund raise \$1 million a year, we would have to have a staff of I do not know how many to do that and to succeed at that, we incur a lot more expenses that we do now. So if we want to talk about the efficiency of getting federal and state dollars, it is probably more efficient. The price to be paid is you follow their rules and regulations. You have the option of not paying that price. I think as far as the service of the client, it is not as large a price to be paid. It is larger than we would like but I think that is just the nature of people not wanting others to tell you what to do. On a report card, you could say, "Needs an improvement."

End of Interview