
Legal Aid Ontario

Consultation Project

- The Future of Criminal Law Offices
- Clinic Relationship Paper

Quotation

June 18, 2008



1 Balmoral Avenue, Suite 210
Toronto, Ontario M4V 3B9
Telephone: (416) 513-0020
Fax: 1-866-674-6714
www.boardrx.com

Background

Legal Aid Ontario wishes to embark on two consultation processes: one to help inform the decision regarding the future of Criminal Law Offices in Barrie, Ottawa and Brampton and the second to better understand the views of various stakeholders on the Clinic Relationship paper.

Introducing BOARDrx

We are Terrie Russell and Daphne J. FitzGerald, two management consultants with many years of experience and the founders and principals of BOARDrx Inc. The key ingredients we bring to this project are our well-honed consultation skills and our ability to produce accessible, relevant and easy-to-use materials and reports. We have a sound knowledge and extensive experience in consultation both in the for-profit and not-for-profit sectors and have successfully managed prior consultation sessions on behalf of Legal Aid Ontario. Finally, we bring current hands-on experience as agency heads, board members and as individuals dedicated to improving the governance and management of all types of organizations so that they are better able to make a difference in the communities they serve.

The BOARDrx Approach to Consultation

The BOARDrx approach is to design a consultation process that will meet the overall goals of the project in the timeframe specified, within the allotted budget. A key component of our process is the analysis of all aspects of an assignment before starting so that we are prepared for any eventuality. This includes the ability to:

- Understand the needs of all stakeholders;
- Identify potential challenges in advance; and
- Solve those problems in the event that they arise during the assignment.

We also believe that each consultation assignment should:

- Be tailored to the specific project rationale and target audiences;
- Be able to track all activities and results so as to ensure complete understanding of the project's progress;
- Provide timely feedback to allow for continual improvement and future action; and
- Inform the decisions that ultimately must be made to help the organization move forward.

Based on our understanding of the goals of this LAO consultation project, we would strive for an outcome that:

- Ensures LAO has heard the views and perspectives of all key stakeholder groups;
- Demonstrates LAO's commitment to open and transparent consultation; and
- Contributes to effective management decision-making.

BUDGET & DELIVERABLES

Deliverables

June – August, 2008 – Criminal Law Office Consultation

- Review all materials related to the evaluation of the 3-year pilot project
- Develop the outline for the consultation sessions
- Confirm the dates/locations for the sessions and draft the invitation if requested
- Facilitate the consultation sessions at each location
- Prepare the results of each session as input to the final report

August – October, 2008 – Consultation on the Clinic Relationship Paper

- Review all materials related to the project
- Confirm the external key stakeholders with whom LAO wishes to consult
- Develop an outline for the clinic consultation sessions and the sessions to be held with external stakeholders
- Confirm the dates/locations for all sessions and draft any advance material if requested
- Facilitate all sessions
- Prepare the results of each session as input to the final report

Budget Estimate

41 days @ \$600 per day = \$24,600 plus GST and travel expenses (in accordance with LAO travel guidelines)

This estimate was based on the requested number of sessions suggested for the Criminal Law Office consultations (6) and a full complement of consultations session with clinics and external stakeholders similar to the number carried out for strategic planning assignment (18). It also includes travel time to those locations outside the GTA/Hamilton and the time needed for meetings, correspondence, review of all background material, preparation of outline drafts & revisions, coordination of logistics and feedback compilations.

Conclusion

We appreciate the opportunity to be part of this assignment and look forward to having a more detailed discussion of our roles and next steps in the very near future.

Fiscal year	Accounting Period	Jrnl Date	AP Voucher Number or GL Journal ID	Invoice #	Vendor ID	Vendor Name	Account #	Department	Payment Date	GST	Monetary Amount	Totals	Journal Line Desc.
2008		6 2008 -09-15	0012390	07-591	0000003136	Board Rx Inc.	65400	841000	Sept 15-08	60.00	\$ 2,585.20	\$ 2,645.20	Expense Dist.
2008		6 2008 -09-15	0012391	07-602	0000003137	Board Rx Inc.	65400	841000	Sept 15-08	30.00	\$ 1,200.00	\$ 1,230.00	Expense Dist.
2008		9 2008 -09-15	00118390	07-590	0000003138	Board Rx Inc.	65400	841000	Dec 2-08	75.00	\$ 3,000.00	\$ 3,075.00	Expense Dist.
2008		10 2009-01-28	00120666	07-596	0000003139	Board Rx Inc.	65400	841000	Jan 19-09	46.77	\$ 1,870.80	\$ 1,917.57	Expense Dist.
2008		10 2009-01-31	00121633	07-605	0000003140	Board Rx Inc.	65400	841000	Feb2-09	0.35	\$ 14.00	\$ 14.35	Expense Dist.
										212.12	\$ 8,670.00	\$ 8,882.12	



BOARDrx Inc.
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 Toronto, Ontario
 M4V 3B9

Invoice

Date	Invoice #
/14/2009	07-602

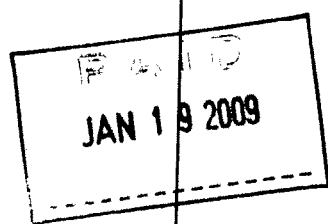
LEGAL AID ONTARIO		
Account Number	Cost Centre	Project
1		
2	6514010 - 8411010	#1260
3	6514010 - 8211115	#12600
Match to PO Number		
Goods Received/Services Rendered		
<div style="border: 1px solid blue; padding: 2px; display: inline-block;"> Authorized Signature or Initials </div>		
<i>VP - POLICY & RESEARCH</i> _____ Title		

Invoice To

Legal Aid Ontario
 Atrium on Bay
 40 Dundas Street West, Suite 200
 Toronto, Ontario M5G 2H1
 Attention: Lyn Iding

Terms
On receipt

Description	Amount
For work performed November & December, 2008 Clinic Relationship Consultations: Toronto - Nov. 3; London - Nov.10; Windsor - Nov. 11; Toronto - Nov.12; Thunder Bay - Nov.13; Sudbury - Nov.19; Hamilton - Nov.20; Ottawa - Nov.24; Toronto - Nov.25 (2 sessions); Belleville - Nov.28; consultations with community partners including: administrative time developing lists; arranging calls (some which were ultimately cancelled); holding calls with individuals as outlined in the report; development of draft report. Total (including travel time) - 20 days @ \$600 per day	12,000.00T
Criminal Law Office Consultations: development of draft report Total 2 days @ \$600 per day	1,200.00T



Sales Tax Summary	
GST (1) On Sales@5.0%	\$660.00
Total Tax	\$660.00

Total	\$13,200.00
Sales Tax Total	\$660.00
Balance Due	\$13860.00

GST/HST No. 832239875 Please make cheque payable to BOARDrx Inc.

Phone #	Fax #	E-mail	Web Site
416-513-0020	1-866-674-6714	dfitzgerald@boardrx.com	www.boardrx.com

120666



BOARDrx Inc.
 1 Balmoral Avenue, Suite 210
 Toronto, Ontario
 M4V 3B9

Invoice

Date	Invoice #
11/18/2008	07-596

Invoice To
Legal Aid Ontario Atrium on Bay 40 Dundas Street West, Suite 200 Toronto, Ontario M5G 2H1 Attention: Lynn Iding

LEGAL AID ONTARIO									
Account Number	Cost Centre			Project					
1	654	00	-84	1000					
2	654	00	-82	1115					
3									

Match to PO Number _____

Authorized Signature or Initials

A/ Director, Policy
 Title *Dec 1, 2008*

#1960.60 (#89.80 GST)
#3150.00 (#150.00 GST)

Terms
Net 30

Description	Amount
For work performed during September & October, 2008	1,200.00T
Criminal Law Office Consultation: Barrie consultation including travel time; Ottawa consultation including travel time: 2 days @ \$600	
Mileage: Toronto-Barrie-Toronto (187 km @ \$.40)	74.80
Train fare: Toronto-Ottawa-Toronto (receipt included)	596.00T
Clinic Relationship Consultation: amendments made to consultation outline; development of community partner session approach; development of community partner contact derived from clinic/LAO suggestions; creation and email of community partner invitation; follow-up with community partner recipients of invitation; facilitation of individual community partner telephone interviews in lieu of teleconference meeting; miscellaneous phone discussions with LAO: 5 days @600	3,000.00T

PAID
11-2-2008

Sales Tax Summary	
GST (1) On Sales@5.0%	\$239.80
Total Tax	\$239.80

Total	\$4,870.80
Sales Tax Total	\$239.80
Balance Due	\$5110.60

GST/HST No. 832239875 Please make cheque payable to BOARDrx Inc.

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118390



BOARDrx Inc.
 1 Balmoral Avenue, Suite 210
 Toronto, Ontario
 M4V 3B9

RECEIVED
 SEP 11 2008
 ACCOUNTING

Invoice

Date	Invoice #
9/10/2008	07-591

LEGAL AID ONTARIO		
Account Number	Cost Centre	Project
1		
2		
3		

Match to PO Number 65400-841000
 Goods Received / Services Rendered

Authorized Signature or Initials

A/ Director, Policy
 Title Sept 11, 2008

Invoice To

Legal Aid Ontario
 Atrium on Bay
 40 Dundas Street West, Suite 200
 Toronto, Ontario M5G 2H1
 Attention: Lynn Iding

Terms
Net 30

Description	Amount
As per Consultation Quotation dated June 18, 2008, for work performed during August, 2008: Criminal Law Office Consultation: preparation for actual facilitations; Brampton consultation including travel time; Thunder Bay consultation; London consultation including travel; transcribing of meeting notes: 4 days @ \$600 Mileage Toronto-Brampton-Toronto (80 km @ \$.40) Mileage Toronto-London-Toronto (383 km @ \$.40)	2,400.00T 32.00 153.20
Sales Tax Summary	
GST (1) On Sales@5.0% \$120.00	\$120.00
Total Tax \$120.00	
Total	\$2,585.20
Sales Tax Total	\$120.00
Balance Due	\$2705.20

GST/HST No. 832239875 Please make cheque payable to BOARDrx Inc.

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SEP 15 2008 112391



BOARDrx Inc.
 1 Balmoral Avenue, Suite 210
 Toronto, Ontario
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Invoice

Date	Invoice #
8/10/2008	07-590

Invoice To
Legal Aid Ontario Atrium on Bay 40 Dundas Street West, Suite 200 Toronto, Ontario M5G 2H1 Attention: Lynn Iding

Terms
Net 30

LEGAL AID ONTARIO		Amount
As per Consultation Agreement Number 18-2008-0001 work period to July 31, 2008: Criminal Law Office Consultation: 4 days @ \$600 per day covering: review of background documents; preparation of consultation outline; development of timetables; meetings & correspondence Clinic Relationship Paper: 1 day @ \$600 per day for work covering: preparation of consultation outline & preliminary discussion of timetable		3,000.00T
Match to PO Number <u>65400-841000</u> ered		
Authorized Signature or Initials <i>A/ Director, Policy</i> Title <u>Aug 14, 2008</u>		
Sales Tax Summary Total Tax \$0.00		Total \$3,000.00 Sales Tax Total \$150.00 Balance Due \$3150.00

GST/HST No. 832239875 Please make cheque payable to BOARDrx Inc.

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112390



BOARDrx Inc.
 1 Balmoral Avenue, Suite 210
 Toronto, Ontario
 M4V 3B9

Invoice

Date	Invoice #
1/19/2009	07-605

Invoice To
Legal Aid Ontario Atrium on Bay 40 Dundas Street West, Suite 200 Toronto, Ontario M5G 2H1 Attention: Lynn Iding

Terms
Net 30

Description		LEGAL AID ONTARIO			Amount
Criminal Law Office Consultations		Account Number	Cost Centre	Project	14.00
Cab fare					
Relationship Consultations					
As per attached spreadsheet					
	<i>elo</i>	1			
	<i>clinic</i>	2	654100	-841000	#14 5,155.60T
		3	654100	-821115	#5454.73
Match to PO Number					
<div style="border: 1px solid blue; padding: 5px; display: inline-block;">Authorized Signature or Initials</div> _____ Official <i>A/ Director, Policies</i> Title <i>Jan 23, 2009</i>					
<div style="border: 1px solid black; padding: 5px; display: inline-block;">FEB - 2 2009</div>					
Tax Summary					Total
GST (1) On Sales@5.0%		\$244.22		\$5,169.60	
PST (1) On Sales@8.0%		\$54.91		Tax Total	
					\$299.13
					Balance Due
					\$5468.73

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121633