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Explainer on recognizing and responding to complex but common legal needs through a network approach

Overcoming isolation, navigating the law together

Introduction

The purpose of this backgrounder is to define what a "complex but common legal need" is, so as to identify them, and the spectrum of network-based interventions that can be used to address them. While the focus and examples used relate to nonprofit organizations, the methodology and strategies can be deployed for other populations in need.

What is a complex but common legal need?

A common legal need is a similar or identical need¹ shared by many that can best be met through legal supports or remedies (e.g. applying for a driver's license). A complex legal need involves a sufficient number of variables or legal uncertainties that some level of individualized supports are necessary or highly beneficial to effectively address the need (e.g. responding to a CRA charity audit). This complexity generally makes it resource intensive to address the legal need.

With a complex but common legal need, the persons who share the need face the same set of factors that make it complex. Consequently, while each case is unique and so individualized supports remain a necessity to meet each person's need, it is possible to create common resources to reduce the complexity and therefore bring down the costs associated with meeting the need (e.g. incorporating a nonprofit or applying for charitable status).

Taking a network approach to recognizing complex but common legal needs

Individuals may feel isolated in the experience of their complex but common legal need if the issue is not well known, talked about, or others who experience the need are not known to each other (e.g. members or volunteer board members dealing with a governance dispute). Furthermore, this isolation often means that, if legal supports are obtained, the legal practitioner may also be isolated and must do original research and drafting resulting in higher time and costs (e.g. general business practitioners in small towns dealing with few nonprofit clients, or private sector lawyers offering *ad hoc pro bono* services).

Taking a network approach to recognizing common but complex legal needs means that when a convenor, such as Ontario Nonprofit Network (ONN), a sector association, funder, or other, learns about a complex legal need a nonprofit is facing, they are curious about whether other nonprofits

¹ By "need" we mean something necessary for the person to thrive. In the context of nonprofits, it means something necessary for the nonprofit to accomplish its purposes.



have experienced the same thing. The convenor may hold informal conversations, make email introductions, or hold more or less formal meetings bringing together nonprofits facing similar needs or challenges (e.g. "We recently heard of a nonprofit with X characteristic being sued. You also have X characteristic. Have you or someone you know faced a similar challenge?").

Recognizing and convening already helps to alleviate the isolation and often leads to *ad hoc* and informal ways of alleviating the complexity, such as sharing experiences, best practices, case law, strategies, referrals of experts, and more. (e.g. One Executive Director describes how her board reacted to Y development in the litigation. Another hears this and knowing Y is coming up for them as well changes the messaging to his board.)

Taking a network approach to responding to complex but common legal needs

Being intentional about using a network approach to address complex but common legal needs can also greatly reduce the complexity and costs. Below we will consider a spectrum of network-based legal supports to address transactional and litigation related legal needs of nonprofit organizations.

Network-based solutions to address the transactional legal needs of nonprofits:

- Static legal information on websites or in print
- Interactive apps (e.g. chatbots, document generators, legal diagnostic tools)
- Workshops and courses online and in-person (both live and asynchronous) hosted by convenors
- Legal information and/or summary legal advice hotline/answering service
- Pro bono clearinghouse, directories with some degree of vetting
- Shared cost traditional legal services
- Test litigation or class action coordination
- Legal research and advocacy aimed at law reform
- Public consultation and interfacing with public service around implementation, enforcement, and administration of law.

CASE STUDY

Helping the nonprofit sector transition to Ontario's Not-for-Profit Corporations Act (ONCA)

From 2013 to present, Community Legal Education Ontario (CLEO) with, and then followed by, Ontario Nonprofit Network helped tens of thousands of nonprofits transition to new corporate legislation by:

- Creating a <u>website</u> that at its peak received over 220,000 views a year.
- Developing an interactive bylaw builder accessed by hundreds of users every year to create new compliant governing documents.



- Delivering over 120 workshops to over 7,000 participants with over 50 local and sector-specific associations, funders, and convenors.
- Providing legal information to over 2,000 individual enquiries.
- Communicating data observed about common issues to government through public consultations to inform legislative streamlining and improvements

Workshop surveys indicate that in roughly 50 per cent of cases, supports reduced or eliminated the need for traditional legal advice, which for an average nonprofit may cost between \$3-10,000.

Network-based solutions to address the litigation legal needs of nonprofits:

- Static legal information on websites or in print
- Specialized guides, briefs, and practical papers aiming at reducing the duplication of legal research
- Convenings and workshops online and in-person (both live and asynchronous) hosted by convenors aimed at sharing strategies and experience as well as emotional support
- Pro bono clearinghouse, directories with some degree of vetting of both counsel and expert witnesses
- Shared cost traditional legal services
- Test litigation or class action coordination
- Legal research aimed at law reform
- Public consultation and interfacing with public service around implementation, enforcement, and administration of law.

CASE STUDY

Coordinating Social Service Providers Response to Legal Challenges to Clients with Complex Needs

Social service providers across Ontario are facing nuisance complaints from neighbours, constraining bylaws from municipalities, and challenging legislation from different levels of government. This results in complex but common legal issues in litigation, such as the meaning of community norms in the context of an opioid context, and Charter issues relating to the provision of life saving services. Most nonprofits facing these situations rely to some extent on *pro bono* legal supports that could be bolstered through a common database of relevant, case law, data, expert witnesses, and a forum or community of practice to share lessons learned through litigation with one another. Courts asked to judge these pressing and cutting edge cases could benefit from both doctrinal and empirical research addressing some of the most novel questions these situations raise.



Conclusion

Taking a network approach to recognizing and responding to complex but common needs holds the potential to improve the efficiency and effectiveness of traditional legal services while coordinating efforts to ensure limited judicial resources result in maximum access to justice for vulnerable people.

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About ONN

ONN is an independent nonprofit network for the 58,000 nonprofits and charities in Ontario, focused on policy, advocacy, and services to strengthen the sector as a key pillar of our society and economy. We work to create a public policy environment that allows nonprofits to thrive. We engage our network of diverse nonprofit organizations to work together on issues affecting the sector and channel the voices of our network to governments, funders, and other stakeholders.