



PLAN Compliance Refresher Training September 13, 2023 1:00

1:00 Managing Attorney Role in compliance.

Discussion of the importance of managing attorney oversight in ensuring quality advocacy and compliance.

2:00 Using Legal Server and other tools to support compliance.

Discussion of best practices in using Legal Server to support the delivery of high-quality advocacy and compliance.

3:00 Funder Expectations and requirements

Funders have many expectations and requirements. A discussion of where funders (PLAN and others) overlap or differ, and where best practices may apply across funders.

4:00 Review and update on the implementation of new demographic selections and the Case Sync Process.

Lunch will be provided for attendees