

**MASSACHUSETTS IOLTA COMMITTEE**  
**EXECUTIVE DIRECTOR**  
**POSITION DESCRIPTION**

**SUMMARY OF POSITION**

Established in 1989 by the Supreme Judicial Court (the “SJC”), the Massachusetts Interest on Lawyers Trust Account Committee (the “IOLTA Committee”) administers the Commonwealth’s IOLTA Program which was established by the SJC in 1985. The IOLTA Committee distributes all interest earned on IOLTA accounts to three charitable entities: The Massachusetts Legal Assistance Corporation (“MLAC”), the Massachusetts Bar Foundation (“MBF”) and the Boston Bar Foundation (“BBF”). These three entities use the IOLTA funds to make grants to: (i) civil legal services programs that represent low-income clients in family, housing, consumer, employment, education, disability, immigration and other civil legal matters and (ii) access to justice initiatives. The Executive Director reports to the members of the IOLTA Committee appointed by the SJC and is responsible for overseeing the operations of the IOLTA Committee. The Executive Director spearheads mission-driven initiatives to secure and maximize revenue available to the IOLTA Committee, creates positive and effective relationships with financial and legal institutions, obtains attorney and financial institution compliance with IOLTA rules, ensures fiscal integrity, is a leader in the state and national IOLTA programs, and delivers effective and efficient staff performance in all operating areas. The IOLTA Committee is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status.

**PRINCIPAL RESPONSIBILITIES**

Maximize revenue:

Plan, propose, obtain approval of and implement strategies to: (a) increase interest rates paid by financial institutions on IOLTA deposits; (b) maximize existing revenue streams in addition to interest income, including litigation matters to the extent applicable to revenue generation; and (c) add new revenue streams to IOLTA's revenue sources. Promote favorable and effective policies for all revenue sources.

Develop positive and effective relationships:

Develop and maintain effective and productive relationships for IOLTA with civil legal services programs and bar associations to maximize and promote the delivery of civil legal services and maximize IOLTA total revenue, including MLAC, MBF, Massachusetts Bar Association (“MBA”), Boston Bar Association (“BBA”), BBF, Real Estate Bar Association (“REBA”), affinity bar associations, and County Bar associations throughout the Commonwealth.

Develop and maintain effective and productive relationships with financial institutions, the Massachusetts Bankers Association, and other trade associations.

Develop and maintain effective and productive relationships for IOLTA with the SJC, Board of Bar Overseers (“BBO”), Access to Justice Commission, and other legal organizations as appropriate.

Develop and disseminate press releases, education, public information, and training materials for the banking and legal community.

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### EXECUTIVE DIRECTOR

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Obtain attorney and financial institution compliance with IOLTA rules:

- Coordinate attorney compliance with the BBO.

- Participate in modifying Massachusetts Rules of Professional Conduct on client trust funds as necessary.

- In conjunction with the Chief Financial Officer (“CFO”) develop policies and procedures, including monitoring, to ensure maximum financial institution compliance with IOLTA Comparability Guidelines.

- Work with BBO, Office of Bar Counsel (“OBC”) and the Treasurer’s Office of the Commonwealth of Massachusetts to implement the Olchowski decision.

- Develop and disseminate press releases, opinion letters, public information, and educational training materials and provide regular periodic training for the banking and legal community.

Ensure fiscal integrity:

- Together with the CFO maintain financial management systems; prepare the operating budget for presentation to the IOLTA Committee; and prepare narratives relating to the allocation of resources within that operating budget.

Lead state and national IOLTA programs:

- Act as spokesperson for IOLTA along with the CFO.

- Proactively address and develop responses to legal and regulatory environment challenges to the IOLTA Committee and its objectives.

- Work with other IOLTA programs throughout the country sharing information and advice to identify best practices for operations and revenue enhancement.

Participate collaboratively in the initiatives of county, state and national equal justice organizations to advance funding for legal services and access to justice.

Deliver effective and efficient staff performance in all operating areas in conjunction with the CFO:

- Manage and supervise internal and external IOLTA operations.

- Ensure the timely, accurate, and effective collection and disbursement of IOLTA funds.

Oversee the Committee Operations:

- Hire and supervise administrative and program staff of the IOLTA Committee in conjunction with the CFO.

- Retain and collaborate with pro bono counsel on IOLTA litigation matters.

- Recommend strategies to implement Committee policies.

- Maintain records of Committee operations, including meetings of the IOLTA Committee.

- Participate in the nominations and training process of new Committee members.

## BACKGROUND AND QUALIFICATIONS

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- ◆ LLB or JD law degree required;
- ◆ Minimum of 5 years of management or administration experience in legal aid community, law firms, legal services, government, quasi-government, non-profits, or charitable organizations;
- ◆ Demonstrated commitment to social justice;
- ◆ Demonstrated experience in increasing organizational revenues preferred;
- ◆ Demonstrated willingness to make revenue maximization the highest priority of the IOLTA Committee's work;
- ◆ Working knowledge of civil legal aid preferred;
- ◆ Excellent communication skills, including ability to effectively communicate and interact with all members of the legal community, and the ability to write persuasively and to confidently make public presentations to diverse audiences in the legal, banking and nonprofit communities;
- ◆ Demonstrated self-starter with creative and entrepreneurial spirit able to take initiative, to multi-task and to manage competing priorities effectively, so as to enable the IOLTA Committee to advance its mission of stewarding and enhancing the revenues available to fund civil legal services and access to justice matters in the Commonwealth;
- ◆ Demonstrated ability to build relationships with and work collaboratively with multiple and diverse communities and constituents, and function effectively in diverse environments;
- ◆ Working knowledge of social media platforms and web site management sufficient to evaluate the effectiveness of such platforms for advancing the IOLTA Committee's purpose and objectives; experience creating digital-savvy campaigns to advance an organizational mission a plus;
- ◆ Proficiency in basic Microsoft Office Software (Word, Excel, PowerPoint) required; and
- ◆ Ability to manage the work of others as required and to allow competent staff sufficient latitude to perform job responsibilities as appropriate.

**REQUIREMENTS**

Willingness to work primarily in an office setting.

Willingness to work evenings for program-related activities.

Attend numerous meetings with diverse constituents throughout the state during business and non-business hours.

Willingness to travel in-state frequently and nationally occasionally.

**BENEFITS**

IOLTA Committee offers a competitive benefits package including paid holidays and PTO, opportunity to participate in a retirement plan, cafeteria plan with health and dental insurance options, and paid parental leave.