LEGAL SERVICES CORPORATION

BOARD OF DIRECTORS

PROVISION COMMITTEE

Friday, April 30, 2004
2:40 P.M.

University of Baltimore
Law Center
Moot Court Room
1420 North Charles Street
Baltimore, Maryland

BOARD MEMBERS PRESENT:
David Hall, Chair
Frank B. Strickland
Lillian R. BeVier
Robert J. Dieter
Herbert S. Garten
Thomas R. Meites
Michael D. McKay
Maria Luisa Mercado
Florentino Subia
Thomas A. Fuentes
Ernestine Watlington

STAFF AND PUBLIC PRESENT:
Helaine M. Barnett, President
Victor M. Fortuno, Vice President for Legal Affairs
John Eidleman, Acting Vice-President for Compliance
            and Administration
Lynn A. Bulan, Senior Assistant General Counsel
Leonard Koczur, Acting Inspector General
Laurie Tarantowicz, Counsel & Assistant Inspector General
David Maddox, Assistant Inspector General for Resource
            Management
Karen Dozier, Executive Assistant to the President
Patricia Batie, Manager of Board Operations
David Richardson, Treasurer/Comptroller
Lisa Rosenberg, Congressional Liaison
Bernice Phillips (Nominee)
William Whitehurst, Jr. (Advisory Member)
Don Saunders, National Legal Aid & Defender Association
Hannah Lieberman, Legal Aid Bureau

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MR. HALL: We are about to begin the meeting for

the Provisions Committee, so we would like to call this

portion of the meeting to order and welcome all of our

Committee Members, Board Members -- McKay, Mercado, Subia.

We may be joined by a Board Member, Ernestine Watlington,

a Subcommittee, and all other our other Board present, who

are present and ^here ^ hear.

The first item is an approval of the Agenda for

today's Provisions Committee meeting.

M O T I O N

.   MS. MERCADO: So move, Mr. Chairman.

MR. HALL: Is there a second?

MR. McKAY: Second.

MR. HALL: All in favor?

(A chorus of ayes.)

MR. HALL: We have in our briefing book Minutes

from the January 30th meeting, and I would seek approval

of those minutes.

M O T I O N

MS. MERCADO: So moved.

MR. McKAY: Second.

MR. HALL: All in favor?

(A chorus of ayes.)

MR. HALL: Thank you. Our major focus for this Provisions Committee is a continuation of some efforts

that we started at our last meeting in January. We had a

tremendous focus on the issue.

I think that may be Ernestine. Hello? This is

Miss Watlington.

TELEPHONE OPERATOR: And I'll hang up. Hold on.

MR. HALL: Ernestine? Ernestine? Hello?

Ernestine, are you ^4their ^ there?

MS. WATLINGTON: Hello.

MR. HALL: Hello. This is David Hall of the

Provisions Committee. The Provisions Committee is

starting its work, so welcome. Glad to have you connected

with us. And if you have any problem hearing us, please

let us know.

MS. WATLINGTON: Oh, thank you.

MR. HALL: Thank you.

As I was saying, we had a major focus on the

issue of quality, feeling that that is something that, as

a Board and certainly as a corporation, we need to get a

better understanding of. We had some excellent

presentations ^4their ^ there and we felt that this meeting should

be a continuation of that.

And part of the focus on quality is being able to

find out what's going on in the field in regard is to

quality and, so, the first part of our committee meeting

will be some presentations from the local individuals who will allow us to get a better understanding of how they are grappling with issues of quality. And then we will have a presentation from the President on some efforts that we are trying to pull together to keep this whole initiative of quality in front of us. And then we have the particular focus on technology that we will get to as well.

So at this time we have three representatives, three local representatives: Hannah Lieberman, the Director of Advocacy for the Legal Aid Bureau of Maryland, who we have spent some time with already this morning; Susan Erlichman, Executive Director of Maryland Legal Services Corporation, Interests on Lawyers Trust Accounts, who's present, and is that Ayn Crawley?

MS. CRAWLEY: Ayn.

MR. HALL: Ayn Crawley, a Director of the Maryland Legal Assistance Network. So we are delighted to have all three of you here and look forward to hearing from you.

MS. HANRAHAN: An additional introduction or background. You did a wonderful job. I'm Pat Hanrahan. I'm here. Randi Youells is not here; she's out of the country and, so, I am here taking her place.

And you've introduced the speakers. I just

wanted to add a couple of words about each, if I may.

They represent, I think to me, the vital force behind the whole legal services system.

MS. WATLINGTON: This is Ernestine. I no longer hear you.

MS. HANRAHAN: Oh, I'm sorry, Ernestine.

MR. HALL: Could you speak into the mike?

MS. HANRAHAN: Yeah, I'll speak into the mike more directly.

I'm Pat Hanrahan. I'm here -- although David introduced everyone by name, I wanted to give a little bit of background on each, very briefly. To me, they're the vital force, the energy behind the whole legal services delivery system for poor people in the State of Maryland, and I, I think it's a wonderful combination of people that we have here today to talk to the Board.

Hannah, as you met her, those of you who met her this morning, she's the Director of Advocacy and she oversees the legal work in 12 offices around the State, supervising, also, other special projects that the program -- I mean, that LAB, the Legal Aid Bureau, Maryland, engages in. Prior to LAB, some of you may know she worked with Lillian Johnson, another Executive Director of another wonderful program, Community Legal Services in Arizona. And, so, she's a long-time person

for the legal services community.

Susan Erlichman, who had been next on the Agenda, works at the Maryland Legal Services Corporation which administers IOLTA and other funding sources to about 28 programs around the State, including legal services, Legal Aid Bureau as well as programs that serve homeless clients, victims of domestic violence and the Disability Law Center.

Ayn Crawley, ^who's ^ whose ^ who is the Director of the Maryland Legal Assistance Network, is, forms collaborative partnerships with other legal services providers, the court, bar association, law schools and community agencies around the State and seeks to increase access to low-income people through the services she provides. Some of you may have seen her demonstrate the websites that she has this morning which are assessible by advocate, some of them, and some by clients and other low income, or anyone, actually, in Maryland, the public who need to find out more about legal services and the law, their rights and responsibilities. We've distributed to each of you some material from Susan and Ayn, and you're supposed to take it with you and enjoy it after the presentation.

And, with that, I'd like to start with Hannah, and then we'll do Susan and then Ayn.

MS. LIEBERMAN: Thank you, Pat. Good afternoon.

Nice to see you all again.

You heard this morning about some of the exciting work we're doing at the Legal Aid Bureau, and you had the chance to talk to staff who are clearly excited about the assistance they provide to clients every day. And these successes you heard about and their excitement aren't things that just happened. As you all know, they're the indicia of high morale, a sense of purpose and a sense of real accomplishment. They truly reflect a program that is committed to and, in fact, does provide high quality legal services.

Now, lots of people, academics and others, can and have tried to distill in the abstract the elements of quality. What I thought I'd do in the very short time I have is to use a recent example of our works to illustrate what I think are the necessary components for achieving quality and the components that make it possible for us to do the kinds of things that you heard about this morning.

Like to take a recent housing case that the Baltimore City Housing use -- Unit handled. About a year ago, we started to see more and more clients coming in with eviction papers. The Baltimore City Housing Authority was trying to evict folks from public housing because they received from the Police a report that somebody who had been arrested, gave the address as our

client's own. The person who was arrested had no connection at all to our client's household. Indeed, once it turned out to be somebody who had laid carpet in the client's household.

Our clients were often elderly, some disabled, often grandparents raising grandchildren or working parents. They had longstanding ties to the community, had done absolutely nothing wrong, but were nonetheless in danger of becoming homeless.

When the first cases came in, we handled them. We won them all routinely, but they kept coming and it became apparent that this was a Citywide practice. And when our efforts to achieve a negotiated solution with the Housing Authority were unsuccessful, we decided to sue. We sought and got an injunction against the practice. We engaged in intense retrying, had extensive oral arguments, started discovery and finally were able to negotiate a resolution. The Housing Authority has changed its practices. People are not being evicted on this basis anymore, and scores of families including many, I fear, who never would have found our doors, have been -- have retained their housing as a result. Clearly, a quality result.

So what did we need to have in place to achieve that kinds of result? Well, first and foremost,

obviously, we had to have a smart, talented and motivated

staff. A key ingredient to quality and the talents and

the motivation, as you'll see, are built in and reinforced

by some other things that ensure quality that I'll talk

about. Our staff had to be able to spot these issues and

see the patterns. And that didn't happen by accident

either; ^it's ^ its another product of quality and, that is,

communication and collaboration within the staff formally,

informally. And in our practice it happens all the time.

We have formal opportunities for communication and

collaboration within our offices and within units where we

make sure we review cases as they come in and analyze them

closely. We have task forces which bring people together

from across the State and make sure that experiences in

different parts of the State are contrasted and compared,

and where we regularly look at both small cases and big

picture issues looking for patterns and strategizing about

responses, and that's where we pick up some of the small

cases that you heard about this morning -- like the

driver's license case which, in and of itself, may not

seem all that significant but turns out to be the tip of

an iceberg to a much bigger problem. And it is in those

task force meetings that we often develop many creative

ideas of new solutions and ways of attacking problems to

solve them for lots of our clients.

So back to the Baltimore City housing example. Another quality element that enabled us to do this work so well was that we gave staff the license and support to pursue a riskier but more global strategy. We have a leadership that encourages creativity and risk-taking when it's consistent with client needs, and we do that in a couple of ways: We have experienced lawyers with senior or statewide status and responsibility as -- and you heard from some of them this morning, who keep tabs on developments around the State, who guide less-experienced lawyers, who provide hands-on assistance on broader advocacy efforts. That way we model effective advocacy and we teach as we go.

We also demonstrate that the leadership of the program is behind creative efforts. And our Executive and Deputy Directors have gone out of their way to explicitly recognize that aggressive advocacy is risky, may not always be successful, but that is -- ^it's ^ its important to be what I call thoughtfully bold. And that's, I submit to you, another absolutely necessary ingredient for a quality program.

Now, we won that case, and we won that case because our staff was so good. Part of the reason they're so good is that they get consistent training on both substantive training and skill-based training. And that,

of course, is another essential component for a quality program.

We have attempted to systematize our approach to training by identifying needs and setting up schedules. We provide skills and substantive training for our lawyers, and we open them to other programs in the community. We send our folks to national trainings, training offered in the State by private vendors and training offered by legal services. We often are called upon to serve as trainers and teachers in those programs, and that's a real recognition of our in-house expertise.

In order to take on new challenges we have to free up time for our attorneys to take on some of these efforts. You heard this morning about the thousands of cases that are in rent court in Baltimore City alone. In order for the attorneys to undertake this litigation that I was talking about, we had to figure out how to readjust our caseloads to enable us to meet the needs of all those thousands of people or at least some of those thousands of people who find themselves in rent court, and take on a bigger case. And that's where our collaboration within the program really pays off: We had more experienced lawyers helping with research writing and editing; we had other staff step up to the plate, who weren't working on the big case but took over some of the smaller cases, so

that a group of our lawyers could have the time to do the

bigger case. Paralegals looked for cases at intake,

flagged them, obtained necessary factual information. And

and we were able to re-adjust our use of resources to

respond to an unexpected need. In other words, we had

sort of a structured flexibility, which I think is another

key requirement for a program that has to be able to

respond to the unexpected.

We are continuing to work to improve our systems,

to facilitate opportunities for staff to be able to work

on bigger picture issues and, also, for the rest of us to

cover our daily bread and butter work.

We also were prepared, when we took on this case,

to commit the resources to what it needed. And resources,

obviously, are another key component of a quality program.

And our staff knew that we would do that when they took it

on. We planned for it. We planned for costs; we planned

for things like depositions, but that commitment to

resources is necessary if you're going to have a quality

program. Our ability to do the case was enhanced by

things you saw this morning, like our case management

system which allowed us to capture and organize

information, retrieve it from offsite, and it also

preserves it to enable us to review it later, to assess

the work that was done. Ann's going to talk about some

really important enhancements to technology and access to the web which really, really contribute to our staff's ability to do targeted quality advocacy.

Ultimately, what made this effort so successful was our staff's buy-in in a shared vision of what we are all about. And that takes us back to the twofold mission that I talked about this morning. And I must confess that I used to think it was kind of silly to spend time talking about things like mission and vision when there was so much work to do. Why not just go out and get the work done? But I've learned that having a vision and a mission and then reviewing that mission periodically, forcing yourself and staff to articulate it, to review it, to re-evaluate whether it still makes sense in terms of what our clients are experiencing and what we're seeing is very important, because that's the underpinnings for our ability to develop goals and articulate goals to lead us to addressing the real pressing problems facing our clients. And we do that in a variety of ways, including all-staff retreats, regular supervisors meetings, supervisors retreats, which give us a time to step back and assess our practice, and then regular meetings with offices, amongst offices and regionally.

We also try very hard to celebrate our successes and to use these opportunities to try to understand and

learn from experiences which may not reach our goals. And all of those assessment opportunities done in a safe and supportive environment are also, I think, an absolutely indispensable ingredient for a quality program.

Our, we talked this morning about our consistent and broad involvement in the broader community. And that involvement also contributes to quality because it keeps us on our toes. It keeps us visible, and it means that we have to make sure that we are persuasive and credible before all sorts of people, institutions and groups. Our clients, community organization, Judges, legislatures, they are all watching us really carefully. And the knowledge that we are in the public eye and have these incredible opportunities to advocate for folks who might otherwise not have a voice is just a constant reminder of how we must continue to strive to do the absolute best we can for clients.

And, finally, when you're working so hard with such limited resources it creates a lot of stress. So to keep up the fight, we need to fuel our creative energies and we need to have fun. And the ability to have fun and to decompress with your colleagues, to work and play well together, as they say, and to foster opportunities to have fun and to relax is also, I think, a component of a quality program that is often overlooked, but it is also

very important. I'm probably way over my time. There's a

pattern here, you see? So I will turn it over to my

colleagues. But I really appreciate the opportunity to

share some thoughts, even briefly, about what makes our

program work so well. Thanks.

MR. HALL: Thank you. Thank you. Why don't we

just hold questions until all of you are finished, if

that's okay with everyone.

MS. ERLICHMAN: Well, thank you so much for

giving me the opportunity to be here today to share some

of the activities that Maryland Legal Services Corporation

has been involved with, regarding helping foster and

nurture quality in the programs that we fund.

As Pat mentioned, we are a funder, as well, and I

guess the best and the most succinct way to describe us is

that we are, essentially, have the statewide charge for

raising and distributing funds to legal services programs

in such way that would provide the most efficient and

effective delivery system. And, so, very, very analgous

to your charge nationally, we were created by statute in

1982 by the Maryland General Assembly. Our Board is

appointed by the Governor, confirmed by the Senate, and

the statute is very much modeled by the Legal Services

Corporation statute, as well.

I did provide an annual report for your reading

pleasure when you're traveling back home. But I, you know, over the years -- the first grants were made in 1985. Maryland, I believe, through the Maryland Legal Services Corporation has developed a very, very rich and diverse delivery system. Pat mentioned, we fund, we currently fund 28 organizations. The Legal Aid Bureau is, by far, the largest and most significant provider of services in the State of Maryland. And I always loved to listen to Hannah speak because it just, it never ceases to amaze me, the energy, and how that enthusiasm and compassion that she brings to everything that she does. And I think it really is indicative of the work you see at the bureau and other agencies, as well.

The other programs that we fund, many specialty programs that target specific client populations or substantive areas: We also fund pro bono programs and, as any responsible funder, we can, we require reporting. There is compliance both for financial and pro bono requirements that are required.

But, in addition, like any good funder, we require evaluation with programs that we fund and the services that are being provided, as well. And that's what I'd like to talk for a few minute about today, because we had a major shift a few years ago in our focus in that regard back in the mid-nineties. Actually at the

urging of the Legal Services Corporation, Maryland formed

a Maryland Coalition for Civil Justice to help address the

impending funding crisis. And through that coalition --

that coalition did its work through distinct work groups,

and ^18I.D. ^ I had the privilege of chairing the standards in

evaluation of our group. From that group we started

looking very carefully at the reports the, that Maryland

Legal Services Corporation require and the grant

applications, as well as other issues.

     For our purposes here today, there were three

recommendations that were adopted by that committee and

that were -- have been implemented and have led us to this

new focus that I, I've mentioned. The first

recommendation that was adopted was that the ABA standards

for the providers of civil legal services be adopted and

that MLSC rework all of its grant applications and

reporting forms to track the elements in those standards

so that we would be able to focus attention on those

issues. Secondly, we decided that the reports would

include some type of data with regard to results or

outcomes. And, thirdly -- and it was adopted that, to

accomplish this, we would also ensure that providers were

given the necessary resources to efficiently and

effectively implement any of these new requirements.

     And the committee -- I should say we had really

excellent representation on the Standards and Evaluation

Committee. We had the Deputy Director of the Legal Aid

Bureau; we had other representatives from smaller grant

programs; we had a State funder on the Committee. I was

wearing my Deputy Director hat from MLSC. So we had MLSC

on the committee; we had other folks that had just a

wealth of information -- Clinton Bamberger, no stranger to

Legal, the Legal Services Corporation, served on that

committee. So it was, I think we really benefited from a

lot of input from a variety of different stakeholders.

And then we went forward and decided that we had to design

and implement this new system. And we did something that

I don't think is necessarily groundbreaking. We hired a

national legal services consultant to come and help us.

And he worked with the programs, worked with us. We went

through a process that took about three or four months,

had day-long, couple, every day-long. Workshops all of

the Grantee programs were invited and strongly encouraged

to attend. Draft instruments were disseminated for notice

and comment. Many, many useful comments were provided to

us.

Things were incorporated into the final product,

and we ended up with an evaluation system that really was

transformed from one that no longer looked almost

exclusively at how much was being done, although we still

certainly were collecting that data, as well, but it had

much more emphasis on how well things were being done,

what results were being achieved for clients. This was

done in a variety of ways, and I guess the most

controversial was the report that we implemented, which is

known as the Major Benefits Report. We were the second

state in the country to adopt this. New York, the New

York IOLTA program a few years ago had started using this

particular instrument and there was a lot of concern.

And, again, this was asking the programs that we fund to

get more data.

So we implemented this in a small way. We

started it out as a pilot project. We asked for

volunteers, and then we enticed volunteers by offering

them, offering to purchase a case management system for

them and converting any data that they had. In this

case, case management system would help them capture all

the information which, actually, was only two additional

pieces of information that was necessary. And we had the

pilot project. It went very well in the third year. We

reviewed it, tweaked it a little bit based on the

experience that the programs had and in 2001 instituted it

as a requirement for all Maryland Legal Services

Corporation Grantees.

I would like to say that it wasn't just a major

benefits report, that changed what I would call the flavor
of these reports. The, prior to that -- and, again, I
think this is far from unique, the reports very much
collected, you know, how many house cases did you do, how
many family laws cases did you do, what type of service
was provided, was it group service, was it litigation. I
think that's important data. And we still collect that.

But the other thing, in addition to the new major
benefits data that had changed, was the questions we
started to ask. For the first time we had a complete
section in our report asking, to the extent the particular
Grantee did impact work, to tell us about that work, what
are you doing, where are you in the process, what are the
results, well, what do you anticipate the results to be.
A special section for alternatives strategies, such as
clinics or workshops. A special section for collaborative
efforts. And, you know, I emphasize this because, of
course, we always had that catchall category of others
before, where one would say, you could put all this stuff
in, but I don't think that that necessarily sent the
message that the new report did, which is that we care
about this; we're not just counting cases; we want to see
the full breadth of the work that you're doing.

I, as far as the results, this is the third year.
Third. I think we're coming up to the fourth year of the

Major Benefits Report, and the new reporting form, and I can say that from where I sit I think it's been a tremendous success. I think that the Major Benefits Report has many major benefits and it is a very, very powerful tool for the Grantee programs. If they wished to use it, as such, to help them assess the effectiveness of the work that they're doing, to identify where there might be weaknesses or strategies that aren't necessarily working, and help them rethink, perhaps refocus some of their resources. I think it helps the programs and, certainly, the funders tell a much more compelling story. It was delightful to be able to share with the Maryland General Assembly session when we were trying to get an increase and filed for surcharges that the funding that was provided last year literally averted, you know, homelessness for 2300 families. That was much more powerful than saying we did 2300 housing cases. And, you know, you could apply that to just about every type of category of case that program, that the programs serve. I think it is a tremendous tool that does help build support for legal services and help us increase resources for legal services, and it helps nurture . From a funder's perspective, is a very, very important message to the programs that we fund, that we truly do care about the quality and the results for clients. That, that's

ultimately what this is all about.

And I just -- you know, there are other mechanisms that I think I would like to see us look carefully at with regard to implementing to help foster and nurture quality. One was another recommendation of the standards of an evaluation committee based on a peer review model that LSC had adopted at that time. It was quite a Cadillac model. We were fortunate enough to have representatives from LSC come and meet with us, and we were impressed with it and said, you know, we would love to do it. We might have to kind of get the, the Ford version or -- but that's something we have not yet put in place. We would -- our attention was diverted, as well, when I ultimately went south.

Another new, relatively new initiative that's being talked about a lot in our community is a program under evaluation where , and I'm very, very much in favor of seeing this, LSC help support programs develop their own internal mechanisms to assess their quality of the services and of their operations as they go forward in their daily work.

I just would like to end by saying that, I mean, as a funder, I have always struggled and continued to struggle with the burdens that any new reporting requirement places on the programs that we fund and

balance that with the need for the information, the data

that we're requesting. And I think ^it's ^ its really incumbent

upon me to do that, because I have some, I think, some

really great ideas, sometimes couple times a week and --

whoa, we just asked for this -- and then I start thinking

about the rippling effect that will occur if, you know,

things are changed in a way that would often create havoc

with systems that have already been developed. So ^it's ^ its

not to say, Hannah, that we might not be changing the

system again at some point because this has been in place

several years and think we do need to stay fresh, and

revisit current practice and really take a careful look

at ourselves, as well. I think in this instance, with

regard to the refocusing of the application and the

collection of major benefits, I feel very, very confident

that the benefits have far outweighed the burden or the

hardship to the programs, and also feel confident that the

programs would tell you that, as well.

So I, really, I just thank you for inviting me to

be here and for all of the help and guidance that I've

gotten from LSC over the years and look forward to, you

know, future opportunities for us to share information.

Thank you.

MR. HALL: Thank you.

MS. CRAWLEY: Good afternoon. I wanted to join

my colleagues and again welcome you to Maryland and to thank you for the opportunity to have the chance to talk about something that is very dear to my heart. And that is the question of how to ensure legal services of absolutely the highest quality for the most vulnerable clients. I wanted to build on the comments of my colleagues, but I also wanted to take this in a slightly different direction. The Maryland Legal Assistance Network is a product of services corporation. It is also a collaborative effort among the 28 different legal service providers in the State of Maryland. Among these, the Legal Aid Bureau is our primary and major partner. The area in which I've been working is the application of technology to legal services delivery with two goals in mind: One is to increase access and service to the low income populations, and the second is to support and enhance the quality of the work done by advocates.

Now, I could be spending the next few minutes telling you, and trying to make it fascinating, all the technical details about how we try to ensure quality in the websites that we manage, the online systems and some of the databases. Instead, however, I would direct your attention to this handout, and what you will see there is some work we're very proud of: Quality control checklists, tracking database, protocols, style sheets, a

number of internal mechanisms that we use to ensure

quality in terms of how we access technology.

On the other hand, I wanted to spend my time

instead, talking about three overarching issues about the

impact of quality and technology, and this is based on our

work here in Maryland. These are three needs that I see

and three that I think are particularly important and are

the ones that we've tried to address here in Maryland.

The first is the need for technoliteracy education to the

low income families. And attached to that, is a need, I

believe, for all the legal services websites in the

country to adopt the ABA standards and best practices for

legal websites. The second, is a proposal for a slightly

different approach to case acceptance strategies, and the

^263rd ^ third is talk about diagnostic tools for advocates. Third

-- first is the question about the need for technoliteracy

education amongst clients. Technoliteracy, as you know,

is transforming the practice of law, and it is

transforming the pace of which change is happening. And

this is nowhere more apparent than in the work that is

available to low and moderate income people. The Internet

library use is up dramatically; the digital divide that

all of you have heard about is closing; low income people

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library use is up dramatically; the digital divide that

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have access to the Internet in increasing numbers. As a

matter of fact, ^we've ^ weave ^ we've taken some data from the focus

groups that you attended this morning, and 34 percent of our clients are reporting that they have Internet access at home. Government programs now put applications for benefits online. You can sometimes make appeals online. Policy manuals that used to be hidden in the bottom drawers of the advocate's desk, as well as the social worker's desk are now up online. Food stamp manuals are up online. People can file consumer complaints online. The courts are increasingly committed to increasing access by putting forms and instructions online. Legal entrepreneurs are pushing the envelope.

Here in Maryland there are two good examples of that: Richard Granite (phonetically), who some of you know has put document assembly materials online with assisted e-mail, as well as call-in assistance. What is interesting about that, is many of these services are available in price ranges that are appropriate for our clients, $20 to $30. In addition to which, the Legal Advice Line, another entrepreneur here in Maryland, also offers legal advice over the phone for $35. All of these are important changes for one particular reason, for low income people.

I should mention another one, actually. You can actually buy coffee or a hot dog and legal advice at the same time. This is not in Maryland; this is in

California. But you never know when it will be coming to Maryland.

In addition to all of these legitimate ways in which technology has made legal information more accessible to low- and moderate-income people, there is the question that anyone can put legal information on the web. It doesn't necessarily have to be related to the jurisdiction of the user; it doesn't necessarily have to have been substantive, reviewed by anybody at any particular point in time. Websites are a very cost-effective way and, therefore, ^many ^ mm people are using it, including legal services as a primary delivery tool.

The quality issues here are twofold, I think. The first is what we offer needs to be held to a rigorous standard. The second is we need to address the perceptions of our clients and the broader low-income community. To address the legal needs of the low-income population, we also need to address all of those people who either cannot or do not make it to our door, yet who have low-income. I believe it's our duty to educate and empower, if you will, current clients as well as the client community at large, not only on how to find our legal information and to assess the efficacy of our efforts in that area but, more important, frankly, I think it's important to teach them how to evaluate the legal

information that they are being inundated with from every

part of the world. We need to give them the tools to deal

with a changing legal world, and we wanted to show them a

couple of the things that ^we've ^ weave ^ we've done in Maryland.

Increasingly, lawyers are not the basic , the

gatekeepers, to basic information. And while legal

services has been a pioneer in pro se, often people have

thought about it as a sort of second rate way to deliver

legal services. Although the vast majority of our cases

are closed based on advise and brief services, technology

gives us the capacity to increase the depth and breadth of

this information. There are two approaches that Maryland

has taken that I think serve as models: One is we have

adopted the ABA standards for best interests for legal

websites. What I'm showing you, and what you have in your

materials is on the People's Law Library, which is our

public access website. And what you will see is among the

things that not only we hold our website to, but that we

encourage clients to look at is having visible material

revision dates, information about legal jurisdiction. And

what you will notice in this page, as an example, we have

a date at the top that says the date that it was last

edited, but also at the very bottom, we say the last date

it was reviewed in this case. There's no legal content.

We say the date, the organization, and we also have the

source of the information. This is critical information

for anyone who's consumer legal education and information.

And I believe that all of our clients deserve the best we

can offer, which includes empowering them to understand,

wherever they get their legal information, they should be

demanding to know about this.

^we've ^ weave ^ we've gone even further than just adopting the

standards. One of the things we've done is put the

standards up on the website, encouraging people to learn

about those standards.

And ^we've ^ weave ^ we've gone further than that. We've put

together these brochures which you have in front of you,

as well, and we copublish these for 20 different

organizations in the State, teaching people not only to

get to the People's Law Library because we think it's a

good site, but also teaching them about the kinds of

things that they should look for in legal information

websites.

I would like to see us go a little bit further,

and that is to look at the question of intake and to use

that as an opportunity to provide technoliteracy

education. One can, in a few sentences, encourage clients

to understand the distinction between any old information

that is on the web and concrete, reliable information that

is on the web. I think we can go back to the health care

model where, not only do you go to get your tooth filled, but they also tell you how to floss your teeth while you're there. We can use that preventive approach in legal services, as well.

Having said all of this, websites are not for everyone; one size does not fit all. And while the Legal Services Corporation and the legal services entities have made an excellent beginning in terms of looking at websites for readability and literacy, I think we need to go beyond that. In order to ensure real quality on the sites, the real question is, are we opening the door just to have people run into a brick wall? We need to think about websites as one strategy and an integrated delivery system, but we need to mix and match it with staffed resources. For example, hotlines and websites are a good partnership in terms of how you might present information and get people assistance.

My observation is that we need an additional step for our self-help programs, and we've begun to explore some of these approaches. And the question is, not only is the case appropriate for pro se, that is self-representation, but is the person appropriate, do they have the skills and traits to be successful, or are we setting them up to fail? My thought here is that we need to look at whether or not the person, regardless of

the simplicity of the case, is appropriate to represent

themselves. We have tried to address this in a couple of

different ways. Some of you saw this this morning. One

is to have an online diagnostic skills and traits quiz

that people take. Has nothing to do with the legal merits

of their case; it has everything to do with their ability

and capacity to represent themselves. I think we need to

go further and examine cases when they come before us, as

to whether or not, from the advocate's perspective, they

believe the person is suited for self-representation, and

that we should build this into our self-help programs.

Not simply provide the forms and instructions, but also

figure out ways to provide that analysis. And we may

choose to take the cases where the case is relatively

simple; however, it is one that is not amenable to

self-representation or because the person is not capable

of self-representation.

^33III ^ the third point that I wanted to make and,

^33final ^ finally, is on the issue of quality and technology. And

looking at both the conservation and expansion of the

intellectual capital within legal services, we often have

extremely talented advocates, and we also often have a

fairly high rate of ^turnover ^ turn over. The challenge for legal

services in insuring quality representation is to capture

the accumulated expertise and knowledge and to transfer

that to a new generation, or to a new position. Training

is critical. It's often underutilized. And Maryland has

made a number of efforts to make sure that training is a

key part of the advocacy system. But I believe the

technology can offer the tools to offer just-in-time

training. Not just trying once a year, but the

information at the advocate's fingertips when they need it

and the ability to take that information and that analysis

that comes from the initial concrete meeting with the

client and put it online and to make it available.

I wanted to show you one of the things that ^we've ^ weave ^ we've

done in that area. ^it's ^ its also in your materials on Tab No.

7. The one in the materials deals with divorce; there's

one that's under construction, bankruptcy. And one of the

things there is that this is not a traditional source of

information. This is meant for people who are doing

telephone screening, who are doing that initial client

interview. And what we're asking people to look at is not

a sort of overview of the bankruptcy law, but to do that

initial red flag triage. In the area of bankruptcy, one

of the things you'll notice, we give definitions. We give

them a number of bits of information. Underneath of each

these are information from multiple organizations. So

it's not simply one advocate's experience, it's multiple

advocates' experiences.

When you look at this, you'll see there's a
series of questions and screenings that -- also, you'll
notice that there are some links. One of these links, for
example here, this is something that someone who casually
does bankruptcy, or may not do it as often may not know,
and that is that there has been a class action settlement
in the household of beneficial finance. there is a
special program for mortgageholders ^35their ^ there, and it helps
them prevent foreclosures. That's one of the questions
you should ask and you might not know to ask if you are
not an expert in that area. It, this puts that
information at the advocate's fingertips, in addition to
which there a variety of ways in which special consumer
rights are recreated depending on who holds the mortgage.
When you look at that, that may be something that only a
very specialized person in the practice may know. For
example, ^here ^ hear what you have is, at your fingertips,
situational factors to look for, remedies that are
possible if the person has that type of mortgage. All of
these are critical ways to sort of put together an amalgam
of practice tips, the law, as well as taking that
expertise that resides from our substantive experts and
put in a place where everyone has access to it. And,
also, an effort to look at cross-cutting issues.

Thank you. It's been a real opportunity to offer

you this information, and I very much thank you for giving

me a chance to offer both my observations, as well as an

example of some of the things we've been working on in

Maryland.

MR. HALL: Thank you, very much. Thanks for all

of you for excellent presentations. Questions from Board

Members?

MR. DIETER: right here. I'm a little bit

confused about websites you talked about. The websites

you showed us appear to be for internal use.

MS. CRAWLEY: This is for advocates. It's for

internal use to the extent that it's shared by multiple

organizations. It is not for the public; it is for

advocates, criminal attorneys, as well as staff attorneys.

MR. DIETER: But there also is a public website?

MS. CRAWLEY: That's correct.

MR. DIETER: And that also has information for

the public?

MS. CRAWLEY: Absolutely.

MR. DIETER: Now, is that information substantive

in --

MS. CRAWLEY: Yes.

MR. DIETER: -- terms --

MS. CRAWLEY: Yes, it is.

MR. DIETER: Mm-hmm. I have trouble with that.

That we live in a populace with the public, and if we think that anyone can use the Internet to read a set of plans, or to read a cap (phonetically), or to build a skyscraper, but I don't think that people can represent themselves in a number of situations. What safeguard do you have that people are not encouraged to use your website freely and gather information to get themselves in even greater trouble than they're already in?

MS. CRAWLEY: We address that in a couple of ways, actually. The first is the areas that we have that provide the self-help information, that is, model letters and forms are the only areas in which we believe that people can represent themselves. In many areas, for example, the most significant area, perhaps, is the issue of civil rights. And what you will see is we tell people, let us give you a general overview, but the bottom line is you need to go to Civil Rights in Maryland, get legal help. And what we do is we give them an overview of the law. We describe special classes. We say this is something you should never do on your own; you have an issue; go talks to these folks. That is something that we make an effort to build into every part of this.

We make an effort to build in other resources, as well, mediators and others. I think that part of it, and what I was talking about before, is putting together some

of these quizzes that I mention, where we're encouraging

people not just to think that because they can find the

form online and the forms are put out by the courts, the

forms are here, but not to just look at the forms but,

also, to really think through should you be representing

yourself. And if you shouldn't be representing yourself,

this is an example of the Skills and Traits Quiz.

Then what we do is we refer them to the various

resources in the State and we try to apply that. In this

case, the most well-developed is in the family law area

because that's the most well-developed area for a person,

in general. But we think it's critical that they

understand the difference. And, also, the role of

unbundled legal services, that is, limited scope

representation so that attorneys, where someone goes

through and stays at the pro se program, we have -- and

one of the quizzes I can show you is one on the issue of

property. And what we do is we give them red light, green

light and say, you know, in some instances their issues,

that if you answer yes, great, move on. If you represent

yourself in other instances, if you answer, what we tell

you is, you need to consult an attorney.

MR. DIETER: Thank you, very much.

MR. HALL: Questions?

MS. MERCADO: Yes. I think Miss Erlichman had

made a comment earlier about always trying to balance the

resources that you have with data and accountability that

may be required of you as far as the need for gathering

information, paperwork that's required for it versus the

actual delivery of service to the people, the client

community that we're doing. And, again, going back to the

issues of resources, is there any point in time, that if

reporting requirements are being asked of you, is there

any analysis done of what resources are being used to

allocate, are allocated to do a particularly mandated

outcome or reporting that you might have versus if you

used x amount of money to actually represent clients? Is

there ever any analysis that is provided for whoever the

funding sources are that you use?

     MS. ERLICHMAN: Well, the analysis would have to

be provided from one of the programs that we fund. Now,

let's just go ahead and say I have an advocate program,

therefore , and not being a burden at all from taking up

almost their entire grant, depending on their perspective.

And I don't mean to be flip, but it really does vary

dramatically. We feel very strongly that programs --

that we will provide grants within the grant; that we make

funds for necessary tools to make it easier for the

programs to do their jobs efficiently and effectively, and

part of that job is being able to report responsibly and

accurately to us, and to other fundraisers, as well. That

we really encourage programs, perhaps, not to have

cutting-edge, state-of-the-art computers, but certainly to

have the computer they need, the software they need, the

programs they need and we provide resources towards that.

But with regard to, you know, how much money does

it -- you know, how much money would otherwise be

available for direct representation or for legal services

if they didn't have to report to us, that -- I don't know

of any.

MS. MERCADO: ^no ^ know. And I guess ^it's ^ its a question of

balancing. Not so much that it isn't required in whatever

funding sources there are that are given to anyone in that

particular community to provide services to poor people --

is that what amount of reporting of data is actually

necessary and can be gotten from   -- certainly, like doing

this research over here, how much of it is necessary to

report and know that you're not wasting that money, that

you're not using it, misusing it, according to whatever

the funder -- whether it's legal services or any other

funder. But I didn't know whether or not there had been

any kind of, sort of general principles that you would

look at or certain qualities that you would look at to see

whether or not a particular entity is, in fact, reporting

accurately to the funders. I mean, are there any systems

that you have seen, that have worked more efficiently

than -- either in the data that is given to you --

     MS. CRAWLEY: Most of it really is program and

staff specific.

     MR. HALL: Mr. Garten?

     MR. GARTEN: I know that you all have spoken and

made presentations before at various professional groups

around the country, like the National Association of IOLTA

Programs and others. To what extent are your programs

being replicated in other states? You see --

     MS. CRAWLEY: Is this an open question?

     MR. HALL: ^it's ^ its addressed to all of you.

     MS. CRAWLEY: Well, I can start. Well, as you

know, the issue of legal websites, both for advocates and

clients, is something that is happening -- in terms of the

client's side, in 40 states; in terms of the advocate

side, in 22 states. Certainly in terms of some of the

things that we've worked on in Maryland -- we have been

adopted by a number of other places. And we know this

through some of the conferences that we've gone through

and some of the training that ^we've ^ weave ^ we've done. Is that part of

the answer?

     MS. HANRAHAN: From my perspective, looking at

our substantive delivery and our substantive focus, we

have a number of opportunities to provide other programs

with examples of what ^we've ^ weave ^ we've done from Litigation Director

Conferences to the Substantive Law Conference to statewide

conferences that we have here in Maryland. And that gives

us all an opportunity to learn from one another and share

programs. And some of the programs that you heard about

this morning -- the representation of noncustodial parent,

for example, is one where other programs have responded

with expressions of, first, skepticism and then great

interest -- and we have provided guidance and assistance

when folks have responded to us about some of our programs

along those lines.

    MS. ERLICHMAN: Herb, as you know, we are active

participants in the National Association of IOLTA Programs

which meets twice a year in conjunction with the American

Bar Association and holds two full days of workshops. And

from that I would say that, you know, ^many ^ mm of what we

consider each other's best practices we certainly share at

those workshops. Every IOLTA program is run somewhat

differently and, you know, some are much more active with

regard to working with the programs and trying to direct,

perhaps, to policy and sort of practices. But I wouldn't

necessarily say that, you know, well, what we're doing in

Maryland has been adopted by 12 jurisdictions. But I can

tell you that we were the second state to adopt these

major benefits reporting which we benefited greatly from

the work that had been done in New York, but built on

that, and then that became somewhat different, and then

was incorporated by Virginia and Texas, and I believe one

or two other states. So it's more of a back and ^43fourth ^ forth ^ for the, if

you will, with regard to the funding community.

      MR. GARTEN: All right.

      MR. HALL: Questions?   I have a few, myself,

starting with Miss Lieberman.

      MS. LIEBERMAN: (Nodding head yes.)

      MR. HALL: You mention as one of your components

for quality this whole notion of training and how

important that is. I got the impression today, and I

think I'm accurate, that you have, at least in one of your

areas, a support center that helps in, carries out one of

your specialty areas. And I guess, I'm just trying to get

a sense of what is your take of the role that those sorts

of entities play. If I am accurate, that you do have one

built-in in trying to achieve the notion of quality, and

since my impression is, then, a lot of legal services

organizations are now without those sorts of services --

      MS. LIEBERMAN: (Nodding head yes.)

      MR. HALL: -- is that a key component, or is it

just something that would be nice if you have it, but not

not something that's central?

      MS. LIEBERMAN: I think it's very central. And I

think the loss of support centers a number of years ago

really put a significant burden on programs in keeping up

with the law, training new advocates, developing responses

to new problems and new laws. I think what you're

referring to is our small statewide unit within the bureau

that covers many of our practice areas and has really

tried to substitute for some of the support that legal

services programs used to find from outside their program

in terms of helping to develop training, providing

mentoring, providing resource people can call for

guidance. ^it's ^ its very difficult to provide all of the

support that a program as big as ours needs. And we also

provide, try to provide that support to the other programs

within the State. And, so, I think that that's an

absolute. I think that that enables a program to go from

doing simply routine work, to being truly responsive and

proactive in responses to client needs and to really

addressing problems facing client communities.

     MR. HALL: Okay. Thank you. Ernestine, did you

have a comment? I thought I heard. Miss Erlichman, I was

interested in your comment that you feel that the major

benefits, the reporting that you thought had major

benefits. I was wondering if you could tell us, and ^it's ^ its,

in part, going to this issue of balancing reporting with

the notion of not burdening the work of the office, if you

could narrow down what what is it that you're getting now
that you weren't getting before that makes you feel that
whatever burden this may create is worth it, because look
at what we have now to make this decision we didn't have
before --

      MS. ERLICHMAN: Sure.

      MR. HALL: -- what, what stakes are.

      MS. ERLICHMAN: We have a, we have data that
shows us what the actual benefits are to clients; whereas,
before, we just knew that the client had received some
type of service.

      As a funder, it is, it is, I just really can't
really express enough the importance, and how useful it
is, to be able to look and say, okay, so there were 2500
protection order cases filed. How many protection orders
were granted? Now, it doesn't necessarily mean that if,
you know, it wasn't granted in a particular case that it's
poor lawyering. That's why we call this major benefits.
We're really not asking for outcomes in every case. If
you lost a case, that's not on the report. You know, I
think this is why we've always, particularly in the legal
services community, have had trouble getting our hands
around, how to assess quality, because you could have, you
know, the best lawyer in the world using, you know, the
very best skills and tactics and your client might not get

the result that he or she wants. So that's not it. But,

for example, that might show us, if we're looking at a lot

of cases being filed in a particular type of action and

the results are overwhelmingly dismal, there's probably a

problem there somewhere. Maybe there's a problem on the

bench that needs to be addressed systematically.

     MR. McKAY: A lot of us feel that way.

     MS. ERLICHMAN: I think, you know, like any

data -- and, you know, I know that there's programs that

we find -- and I say this, I repeat this like a mantra,

but I mean it sincerely -- I think the data is such an

important, and very, very important data, because you need

that place to start. It helps inform us and flag things

that may raise questions. There not always problems, but

there -- it, it's very, very useful. If I see that for

some reason the Baltimore City Office, the Legal Aid

Bureau did 10,000 cases last year and this year they did

5,000 cases, something changed. I might not know what

that is. I mean, just on the ^face ^ phase of looking at that

data. And I'm certainly -- that's not where the inquiry

stops; it's where the inquiry starts.

     So, in any event, I think that, the outcome data

is necessary in a variety of ways. Not just to -- I think

one of the most powerful ways is that it really does not

only help us, but helps the program see, in a very real

way when they sit down to do these reports, the incredible

difference they're making in clients' lives. And I guess,

you know, if you're an advocate and every day you're

representing a lot of clients, you get that gratification,

and you know that. But a lot of times the people who are

filling out these reports, the Directors of the projects,

they don't have that type of work experience every day,

and to sit down and put a report together that says, look

what our Housing Unit did ; I can't believe all of these

children that, you know, are still in intact families in

homes because of what ^we've ^ weave ^ we've done these past six months. I

just think that really brings a very, very different focus

than saying, boy, we had a lot of housing cases. But I

can move on.

 MR. HALL: No. That certainly clarifies it.

 One last question. Miss Crawley, I was impressed

that you had some, done some surveys, that had indicated

that --

 MS. CRAWLEY: Mm-hmm.

 MR. HALL: -- the digital divide is closing. But

I ^guess ^ guest I was still a little concerned that if your data

is correct that 36 percent of low-income people have

access. When we get up to the higher income levels, I

would -- and I haven't seen the data, but my suspicion is

that ^47its ^ it's probably 90 to 100 percent.

MS. CRAWLEY: It's true.

MR. HALL: So there's still a big gap there.

MS. CRAWLEY: (Nodding head yes.)

MR. HALL: Is there any role that legal services, Legal Aid, in general, has in trying to close that gap? Are there legal strategies efforts? I mean, I don't know if that's, falls outside of parameters of the things which we'll be talking about. I mean, we saw a presentation this morning about economic development and how we're trying to not just provide people with legal rights, but trying to change the quality of their lives. Are there theories --

MS. CRAWLEY: (Nodding head yes.)

MR. HALL: -- being bantered around on how do you close this digital divide even more?

MS. CRAWLEY: Absolutely. I think in addition to the issue of the sort of technoliterary education piece that there's a real need for partnerships with agencies in the community that do provide access. For example, libraries around the country provide Internet access. There was a recent study at the University of Washington School of Law in which they show there was something on the order of a 17 percent increase in terms of library patronage when they introduced Internet access. That's another way that low-income people can use it. And what's

been interesting in terms of legal services is that

frequently libraries are a place where advocates for

homeless persons can connect with their clients because

they use e-mail to connect back and forth. That is one

way.

A second way is that a number of the technology

companies are now funding local community organizations to

provide Internet access. Here in Baltimore, for example,

the education based Latino outreach group EBLO got a grant

from HP to put in 15 computers in a low-income community.

We have an outreach site there with the People's Law

Library, our public access website. We train people there

to help people to get onto our website, but we're using

the resources that they have.

Third are the community technology centers that

are springing up around the country and are taking on the

challenge of not only providing the physical access, but

also the training. And I think having partnerships where

our websites are part of what they use for their training,

part of what they offer in terms of having the default on

their website is a way to make sure that our information

is getting into the community and that we're partnering

with people who are getting resources from other areas,

particularly the technology vendors who are very

interested in using that as their corporate pro bono work.

Just sort, among other things, online access for our

community.

     MR. HALL: Okay.

     MS. LIEBERMAN: And if I can just add one thing.

I just want to underscore your point about how that could

be part and parcel of our community economic development

work. It very much is. And a lot of the, particularly

the tenant organizations and groups with which we work

have, as part of their efforts, that we help facilitate

development of communities centers within their housing

complexes, and those community centers always include

computer access, and computer training and computer

programs for children.

     MR. HALL: And, so, the funding for that becomes

a part of the negotiation with the developer --

     MS. LIEBERMAN: Yeah.

     MR. HALL: -- or is it separate?

     MS. LIEBERMAN: As Mr. Countess (phonetically)

described earlier this morning, we help those

organizations obtain grant funds to support that work, or

to go to the County. Sometimes we get that funding from

developers as part of the quid pro quo for having the

redevelopment opportunity, a mixed income development and

then we retain affordability funds in that development,

and the developer kicks in the funding to provide the

ancillary services.

MR. HALL: Thank you. Thank you.

MR. DIETER: Yeah. I have a follow-up question about the survey, which I'm fascinated by.

MS. CRAWLEY: ^it's ^ its a limited survey. It's 76 people so far.

MR. DIETER: This is the annual report? I'm sorry.

MS. CRAWLEY: I'm sorry.

MR. DIETER: But the sundials only records the happy clients, does not record the failures, if I understand your form correctly.

MS. ERLICHMAN: Yes, it did.

MR. DIETER: So far we're in agreement. Would it be of interest to record the attempts that failed not to reflect adversely on your Grantees, but to indicate which areas of the law or which attempts are more effective than others ? You could simply add a column, to attempt to obtain Federal bankruptcy protection, number of attempts that succeeded.

I think that as far as gathering data about the effectiveness of legal assistance that would be a fascinating source of data. I have no idea how many times, what percentage of times legal assistance lawyers attempt to avert repossession, and succeed and fail? I

don't think anyone knows that. But you have a document

^here ^ hear which could be very easily modified to obtain that

information, which I think would go a long way to helping

us help other legal service Grantees and service providers

to determine where efforts are likely to be worth making

and not --

MS. ERLICHMAN: Yeah, I, I agree. We use this in

conjunction with our -- this is a supplement to our entire

final report. In that report there will be, although not

as specific as you're suggesting would be here, the total

number of cases are reported. So, I mean, to the extent

that you can do a rough analysis of, well, this many

cases, you know, the -- this is how many cases were

handled, of those, that's how many cases got this

particular result.

MR. DIETER: Does it --

MS. ERLICHMAN: It doesn't give the prescription

that you're suggesting, but a good idea of subtracting,

none of the results would be obtained of what you lost,

what your Grantees lost.

MR. DIETER: Thank you.

MS. ERLICHMAN: Thank you.

MR. HALL: If ^52their ^ there are no other questions I just

want to thank all of you for your insightful presentations

but, more importantly, for the hard work that you're doing

our challenge remains to determine how do we

define quality, how do we measure quality, and what is our

role as a funder, in trying to ensure our Grantees

provide, and their clients receive, quality legal

services. I am extremely grateful to the Provisions

Committee of the Board for spurring this discussion over

the yearlong process and being able to have presentations

like we've had at our January meeting and at this meeting.

And although the question as to what constitutes highest

quality and legal services is not an easy question to

answer, we are trying to identify, based on the

presentations, what we've learned from the presentations

made to the Committee so far, and based on what we've

^53red ^ read, that observers seem to agree what are some of the

core components of a quality matrix for legal services

providers. And I to have admit I'm going to add some

based on the presentation we heard today.

They surely include good case management systems;

competent, motivated and appropriately diverse staff;

consistently strong outcomes or benefits for clients; a

high degree of client satisfaction; involvement in the

community and support from the community; efficient and

cost effective use of resources, accessibility to and by

the client communities being served, and a program of

continuous quality review and improvement. And to that

list, we heard today the role of leadership, and the role of training and enhancements through technology, amongst other additions to be made to this list.

However, agreeing about the definition of quality is certainly much easier than making it happen. Since LSC is not involved in the day-to-day revision of legal assistance to eligible clients, we do not have direct control over the quality of services provided by our Grantees. Consequently, the work that we do to promote the quality is a bit more attenuated than it is for our Grantees. What we are able to do to assure quality, although not as direct or, perhaps, as simple, could involve the following, which is still very significant:

We could compel our Grantees to focus on a definable quality agenda; we could ask that our providers be evaluated and evaluate themselves in terms of the quality of their services; we have the capacity to develop standards that define quality and to hold our Grantees to those standards; we have the ability and the information necessary to identify high functioning programs and to hold them up as programs worth emulating, and we have some fiscal capacity to sponsor objective credible research on delivery and quality approaches so that programs have better information and a better basis for choosing how to deliver legal services.

I will briefly review some of the initiatives currently being pursued by LSC staff to ensure that the services we found are of the highest quality possible, and I will also make some preliminary recommendations as to new initiatives that LSC could pursue in order to assist Grantees in achieving uniformly high quality through the legal services delivery system; recognizing that this is an an ongoing process and that we have yet to hear from many interested additional parties.

The Office of Program Performance currently conducts program visits to monitor program developments, to learn about problems and to develop new strategies for expanding access and enhancing quality.

On-site reviews take a number of forms. Technical assistant visits are conducted after LSC receives a request from a program for assistance in a particular area, such as intake systems, legal work management and supervision employee relations or technology. Program quality assessment visits are designed to evaluate the performance of Grantees and to give LSC additional knowledge about programs that have not been visited recently. Program quality visits also occur when LSC staff believes that certain challenges facing the program need our attention. TIG visits are made to selected Technology Initiative Grant recipients as part of

the TIG grants management process. Post-reconfiguration visits occur two years after a service area has been reconfigured to assess how well the program is serving the new service area and the extent to which the restructured organization is operating cohesively. Evaluations of state justice communities are performed using the state planning evaluation instrument that was crafted by a design team of national legal services leaders working for most of 2002 and 2003.

The Office of Compliance and Enforcement in LSC, in order to ensure Grantees comply with Congressionally-mandated restrictions and all of the applicable rules and regulations, conducts Case Service report and Case Management System on-site visits and follow-up visits to monitor program compliance in such areas as financial eligibility, citizen/alien status, timekeeping, private attorney involvement, and the use of non-LSC funds, among other issues. OCE has also conducted financial audits and conducts follow-up activities relating to referrals received by LSC management from the Office of Inspector General. It is also OCE's responsibility to ensure compliance with the LSC Accounting Guide by reviewing the program's financial statements when that program has undergone an audit.

I have initiated a pilot project and, at my

request, a joint team composed of Office of Program Performance and Office of Compliance and Enforcement staff have been working together to determine how the two offices can work together combining talents and resources to conduct one LSC visit to an LSC Grantee. The pilot visit will take place this summer at Legal Services of Northwest Minnesota in Moorhead, Minnesota. As part of the planning of this visit, I have asked the OCE and OPP staff to set aside their preconceptions about how to conduct visits to Grantees and to begin to envision new ways to evaluate how well a Grantee is doing in providing high quality legal assistance to their clients in accordance with applicable laws and regulations. I have also asked them to ensure that they work closely with one another to determine how best to consolidate their pre-visit document requests and how to get overlapping and related information while on site in ways that minimize the burden on and disruption to our Grantees. And I'm looking forward to continuing to work with the staff in developing the protocol for this visit.

Once we have conducted the initial pilot visit to Minnesota, we will evaluate how it worked. Our evaluation will include interviewing both our own staff and our Grantee's staff. Based on that, we will make decisions about how to refine, modify and replicate it in the coming

months of the year. I am hopeful that the pilot will demonstrate that our work can be performed more effectively when we combine our talents and speak to our Grantees with one voice.

I also hope that the pilot project will help us develop a prototype of one unified, consolidated and comprehensive LSC on-site visit protocol that will be all-encompassing, informative and less disruptive to our recipients while providing LSC with the information it needs to ensure that the recipient is providing high quality legal services and complying with all of the its obligations as an LSC Grantee.

In the coming year, I also hope to study, with the staff, whether we should implement a system peer review and look to replicate the types of peer review that commonly occur in other organizations, such as at institutions of higher learning and, in particular, the ABA model of accreditation of law schools, without the concept of a formal accreditation. I hope that, as a part of this study, we can implement a peer review pilot project. And I hasten to add, however, it would be very helpful if we were able to obtain some earmarked funding for this pilot project. And, also, in the course of that kind of peer review, part of the process would include a self-study by the Grantees, itself, to help develop its

internal measurements of evaluations.

We also have been asked by one of our state justice communities to consider using them as a test state to begin to determine how the legal services community can build on the groundbreaking working conducted by health care professionals to improve the quality of health care delivery. One of our four Grantees in Kentucky have suggested that they would welcome the opportunity to work closely with LSC in a pilot project to define the concept of quality legal care, much like how the health care providers have begun to define and measure quality health care, and then figure out ways to make it happen on the ground in legal services programs and in multi-grantee state delivery systems. I believe this idea has merit, and I would welcome the input of the Board as to how we could establish such a pilot project.

Of course, key to any evaluation review of quality is that there must be agreement on the standards that are to be applied. At LSC, the Office of Program Performance staff has several projects underway involved that review existing standards and quality protocols. The Quality Definition Project is an internal review of quality standards based on development in the field and a review of written materials on quality. In regard to the annual competition, staff members are currently revisiting

RFP questions related to outcomes, strategic planning, dealing with clients with limited English proficiency, pro se and state delivery systems. The TIG competition process also has a formal evaluation program process and has developed evaluation standards. Finally, we are reviewing our own internal program visit protocols and performance standards and revising them to reflect new developments and changing realities including, but not limited to, Grantee work in the area of leadership development and diversity, performance measurement outcomes, strategic planning, the capturing of matters work and the effective use of technology. I hope that the protocol development for our pilot project visit to Minnesota will incorporate these elements. Our work in this area, I cannot stress enough, is ongoing.

But I have also committed that LSC will work closely with the ABA Standing Committee on Legal Aid and Indigent Defense   -- whose Chairman, Bill Whitehurst, is in our audience with us today -- and along with NLADA on a project to revise the ABA Standards for Providers of Civil Legal Services to the poor, which were last promulgated in 1986. It is my understanding, from a discussion with the Chairman last night, that planning for this project has already begun and the collective process will begin in earnest, most likely, right after the ABA Annual Meeting

in August. And LSC is committed to working very closely with SCLAID and NLADA as it helps to develop the ABA revised standards that will obviously take into account developments since 1986 which include such matters as, of course, the use of technology, the concept of limited representation and the concept of unbundled legal services, just to name a few. LSC will then revise our own performance standards, as appropriate, to reflect the new ABA Standards. But, in the meantime, the Office of Program Performance will continue to make internal changes in LSC's own standards and protocols so that the programs being visited this year will not be viewed through a lens that is either outmoded or no longer totally appropriate.

I also believe this data is a useful and important measure of quality in outcomes data, More refined by our Board Member, Tom Meites, by the benefits to clients. Not simply a win or a loss, but what were the benefits achieved by the clients based on the legal services provided. And, of course, as you know, I do come from New York, which was the first program that IOLTA implemented this acceptance of benefits to clients studies, so I am intimately familiar at least with what was required by them then, and I also agree that it is important to balance the burden on programs with the benefit that the data would provide.

In June 2003, LSC, together with the Hale and Dorr Legal Services Clinic, did sponsor an Outcomes Summit Conference. The participants included legal services directors, funders, national leaders, international leaders in legal services and consultants. And much of the day was spent in discussion about the role, purpose and benefits of measuring outcomes in legal services.

LSC will hold its second summit on outcomes on June the 24th through 26th in Cincinnati, Ohio. This summit is for LSC Grantees who currently collect outcomes information, and it has two important goals: First, to allow Grantees who are currently measuring outcomes to share information with one another on what they do, how they do it, and how they use the information they acquire on outcomes; and, second, to give conferees the opportunity to make concrete recommendations to LSC as to how we can begin to collect outcomes data from all our Grantees. In the letter of invitation LSC asks all participants to submit a written recommendation, not to exceed one page, identifying one outcome common to most legal services providers that Legal Service Corporation could measure in a first year pilot project.

As a parallel activity, LSC also has set up a small in-house task force to begin to explore what information LSC should begin to collect in terms of the

outcomes of our Grantees' work on behalf of their clients. The task force has been asked to make a preliminary report before the Outcomes Summit II and LSC hopes to begin a pilot project collecting some limited information related to the outcomes of the work we do for eligible clients targeted for 2005.

This report, in conclusion, is far from all-inclusive and is based on an agenda that is a work in progress. It is an ambitious agenda, but one that will be subject to ongoing consideration, modification and refinement, and one with which we welcome the Committee's thoughts and reactions to it. Thank you.

MR. HALL: Thank you. Thank you for a very thorough and exhaustive report. And I think it certainly addressed the, a lot of the concerns that we had last time.

One thing that I wasn't fully -- it wasn't clear enough to me, and it's a lot of different things that are keeping the quality issue in front of us, was the Kentucky Pilot Program. What is the goal ^63their ^ there? I mean, what would happen with, you know, trying to define quality legal services as it -- you know, using the medical model? I wasn't sure what you would be doing.

MS. BARNETT: I'm not a hundred percent sure either, and that's why I'd like to get input from the

Board and to hear more about what the program's staff

deals with at Kentucky, things that they do. I simply

thought it was worth noting that a group of Grantees have

offered to work with us to see if there's a way to learn

from the health care providers trying to assess quality

health care, and is it applicable to legal services.

MR. HALL: Okay.

MS. BARNETT: I don't believe this is more

defined than that at the moment.

MR. HALL: This may be a better question asked to

Bill than to you, but the standard of review that the ABA

is doing, do we have a sense of when that process would be

completed so that we would know when the review is over?

MR. WHITEHURST: Well, Helaine and I talked about

that last night, and I would love to say that. I mean if

we were going to set a time, ideally, I would say a year

as a practical matter. It -- I'm not sure we can say one

way or the other right now. I think part of the process

is looking into it in deciding how it's all going to

proceed, making sure we have adequate funding for it.

I will tell you this. We're committed to do it

right. We have, the 1986 standards have been used

extensively and they're very important. We have those to

build on now; It will be the first time we did it from

scratch. So we certainly ought to be able to do it

quicker and hopefully better than we did originally. But

I, I'm not in a position I can commit to a time, but I

eventually will be able to. We're starting that process,

actually, at our meeting in the next couple of weeks.

That is on our agenda. And then we also need to talk in

terms of probably hiring a consultant who will supervise

that project. It's a major project.

^I will ^ ill say, again, we view it as very important

and very timely and look forward to working with LSC and

NLADA in the process.

MR. HALL: And the, how in the process will we

get exposed to it? I know how the press and the staff

will, but I know and I understand it's an ABA process.

But doing the development and review of the

standards are their preliminary presentations made. Would

there be a presentation made to this Board about where you

are, or --

MR. WHITEHURST: We will have LS- -- I, since I

am the Chairman of the Committee ^I will ^ ill tell you now that

LSC will be a full partner to this , as NLADA. We will

make as many presentations as you all desire --

MR. HALL: Okay.

MR. WHITEHURST: -- on that. And you can be

involved in it as much as you want to be. I view this as

a collaborative effort on behalf of all programs who

deliver legal services to the indigent. It is broader

than just Federal-funded legal services.

MR. HALL: Sure. Sure.

MR. WHITEHURST: So, but that's important to

remember. And, so, we have a broader community that will

be interested in this.

I do think the ABA is pretty good in making sure

they reach out and get, have timely comments and

involvement with anyone who desires to be involved --

MR. HALL: Okay.

MR. WHITEHURST: -- and I know in talking with

Helaine that LSC will be intimately involved in this. I

do welcome that.

MR. HALL: Okay. Thank you. Other questions of

Helaine or Bill?

MS. MERCADO: Just a quick comment on -- I know

that Kentucky has offered Grantees to be used as a pilot

program, but it would be helpful in a pilot program to

have as diverse a Grantee as you could. I mean, the one

that had, you know, rural and urban language issues, farm

worker or Native American special populations issues, if

that were possible, there are Grantees that had those kind

of factors, so that you could look at the outcomes for

quality assessment that you're going to give where a

general population of clients are.

MS. BARNETT: Thank you. That's welcome.

MR. HALL: Any other questions? One more on my end, the joint reviews by --

MS. BARNETT: The visit?

MR. HALL: -- yeah, the visit -- we have not done this before, so -- before we had both Compliance would do their visits, and --

MS. BARNETT: That's --

MR. HALL: -- the programs would do theirs.

MS. BARNETT: That's, that's -- yes. They never did it together; each one had their own schedule.

MR. HALL: Mm-hmm.

MS. BARNETT: And I would like us to see, whether I'm right or wrong, but the staff has been most receptive to working together and working with me to design a pilot project where it -- I would like LSC to visit the Office of Program Performance and Office of Compliance and Enforcement. And everything -- I can report today is the staffs are extremely collaboratively together. We have the co-team leaders assigned already to the project. And I was pushing, you know, to have it done sooner than later, and all the staff have commented to me it's going to be in the middle of July.

MR. HALL: Which gets to my only comment. Wouldn't it be uncomfortable granting to be visited by

both of these entities in a year, or a short period of

time? And I guess if we were to do this, would we have a

situation now where Grantees would feel as if they're not

getting double visits from the LSC, or feeling as if

they're getting mixed messages, I mean?

MS. BARNETT: I am hoping that the Grantees would

welcome one visit that would be all-inclusive, would be a

comprehensive visit.

MR. HALL: Right. I'm sure they would. I guess

I'm assuming that the reason they would welcome it is

because now they end up sometimes getting a visit from two

different parts of the LSC. Thank you.

All right. Any others? Thank you, Helaine, for

a very thorough and informative report. And it certainly

addressed at least the concerns the Chair had on this --

MS. BARNETT: I'm glad. Thank you.

MR. HALL: -- in this area.

We are about to run out of our time. We have one

more report and, so, I would just ask that that those who

are presenting, to be cognizant of the fact that we don't

want to invade any of the Finance Committee's time too

much, so --

MR. DIETER: You can take as much time --

MS. RABIE: Thank you.

MR. HALL: Okay. Well, thank you for joining us,

Ernestine.

MS. WATLINGTON: Okay. Bye.

MR. HALL: Bye-bye. Mike, would you like to introduce people and get started?

(Pause.)

MR. MEITES: If they talk about source codes, I'm going to cut them off.

MS. RABIE: No, no, no, no, no, no, no.

MR. KENZA: We promise not to. We thank you, very much, Mr. Chairman, and Board Members of OPP.

The Technology Initiative Grants Program is in its fifth year. A great deal has been built. We're proud to say that because of the TIG Program, capacities for services to clients now exist in our community that didn't exist before. ^it's ^ its now our task to see to the completion of the full development of a network of statewide websites. We're also seeking to determine among all of the projects, not just the websites but all the projects, the approaches that work best in order to replicate those and spread them and not spend our resources from those, except those that are most successful.

^it's ^ its my pleasure to introduce Joyce Raby and Jennifer Bateman of the TIG Team. They work with our dedicated Grantees to make all this happen. We'll describe our strategies and our progress in implementing.

Joyce.

MS. RABY: I'm going to start off just as a general context to sort of bring you up to date on where we are. I do thank you for the opportunity to talk with, before you today. I know Jennifer and I are always delighted to get an opportunity to talk about our work.

The purpose of the TIG Program is to increase access for our client community to high quality legal assistance. We have a couple of different strategies we use to do that: We support technology projects that improves client access to high quality legal services and information through pro se initiatives; we support the legal services delivery systems, and we also coordinate leverage resources.

I'm going to give you just a big broad strokes here. The stats on the screen are compilation of all fours years. That's the ground 2000 through 2003. We have received over almost $60 million worth of grant requests. We have awarded out $19 million. We have, that $19 million has been awarded out in the form of 193 grants. Nineteen of those projects have been completed. We have awarded 49 out of a possible 57 statewide websites. And we also have grants located at 52 states and territories.

To give you sort of a breakdown of how that money

has been divvied up I wanted to show you by category --

not best slide   -- let me give you just a rough idea here,

about 13 percent of the money goes to training and

technical assistance, 20 percent to intake, 25 percent to

pro se initiatives, 23 percent to websites and 19 percent

to infrastructures.

And I'm going to talk specifically a little bit

about websites and turn it over it to Jennifer.

MS. BATEMAN: Great. Thank you. As Joyce

mentioned, the TIG Program is funded by the development of

statewide websites in 49 out of 57 states and territories

that LSC serves. The only states not utilizing the

template to date are Massachusetts, Micronesia, New

Jersey, North Dakota, South Dakota and Utah, West Virginia

and the newly-eligible American --

Several of these states either have

fully-functioning websites that they've developed

independently, or they are anticipating starting a

statewide website into the near future. I was going to go

into the primary function of the website, but I think that

Ayn Crawley on the last panel did a very good job of

indicating what the different topic areas are that are

covered in a public site, so I'm not going to go into

that. But if you have questions, please let me know

later.

There's a breakdown of the website funding on this slide from 2000 through 2003. Each state is eligible for three levels of website funding. A first year grant is awarded for 50,000. It focuses on the development of the three components that we talked about: The public site, the advocate component and the pro bono component. A renewal grant, which is usually awarded one to two years after the first year grant, in the amount of 25,000 for a one-year term, focuses on outreach, content maintenance and fundraising, and a third year continuation grant is awarded for a two-year term in the amount of 25,000; its aids in the sustainability of the website.

LSC has also made a significant investment in projects related to websites. Some of these projects include the pro se forms on high application systems, domestic violence modules, court forms, multi-media development, personal case management systems, testing and design changes to the template, research on website sustainability, design changes to the template, the use of technical assistance providers -- which we call our Circuit Writer Program -- document assembly products, such as HotDocs and XML Projects.

MS. RABY: We have found that TIG programs help deliver additional resources, as well. For example, in 2003, TIG grant recipients have received over $2.5 million

from other funders and partners that aid in that

implementation of the project. And most of the projects

that are funded can be replicated either free, or at low

costs to other programs. An example of this is the

evaluation instruments developed by the Legal Aid Society

of Greater Cincinnati. This program created and tested

standardized evaluation tools for websites. LSC then took

the core elements of these tools and implemented them for

each Grantees website evaluation. Programs not only use

these for LSC's evaluation requirement, but also to

conduct their own program-owned evaluations. And I'll be

talking a little bit more about the website evaluations

when we reach that section of the presentation.

        MS. BATEMAN: So the TIG program also helps

create national standards. This is probably the slide

closest to the discussion of source coding that we'll get.

        I do want to talk a little bit about XML. That

is a project to establish the data definition standards to

be used between programs. This is particularly important

when we get into things like electronic violence, so that

how information is packaged on one side, then received by

the Court an identical, so that there is no translation

that needs to occur.

        These are standards that are real important when

doing electronic referrals. We're doing a pilot project

in Washington that is focusing that to allow our programs
to then electronically transfer the intake and eligibility
information to another IOLTA-funded possibly social
service, any other program that might then be able to use
that information in an electronic fashion.

I also want to talk a little bit about what we
call the web index. That's merely a fancy way of saying
that we're using common coding standards among all of the
statewide websites to ensure that when searches are done,
data is collected in a common manner through all of the
search engines that are available on the worldwide web.

We also do a lot of terms of building state
justice communities. I wanted, in particularly, to talk
about a program in Virginia, Potomac Legal Aid, that has
developed a partnership with the national agent specific
American Legal Consortium to assist them in doing intake
to non-English-speaking Asian communities. Not only do
they do eligibility and intake screening, but then also do
referral and provide translation services. This is a huge
outreach and benefit to clients in that particular
community.

And I'm going to take an opportunity on this
slide to talk a little bit about the -- there was a
question earlier, Mr. Hall, you had, about access points
and things we could do. One of the things we did at the

last TIG conference was to have an entire track built around national collaborations. Those are collaborations that the TIG staff, as well as our programs, attempt to create. We had a representative from HUD talking to us about ^their ^ there neighborhood network program. Those are computer labs that are being placed in public housing, ensuring that our programs are aware of those networks in their communities and, also, then that those communities and the gatekeepers in those labs are aware of statewide websites and sure that that is a, the website of choice when looking for legal assistance information.

We're also nationally working with the CTC Net folks. Those are the community technology centers. And we hope this year, at the next conference in January, continue on in that in that track looking for other points of access. One of the benefits of doing that is that those points of access serve as sort of trusted sources for those communities. So by partnering with them we establish our credibility as a good source of information on the web for legal assistance and sort of a shared credibility we've seen happen.

And I believe this one's you, Jennifer.

MS. BATEMAN: I got some very exciting statistics from Gabrielle Hammond (phonetically) from the Orange County program that I wanted to share with you today

regarding the ICAN Earned Income Tax Credit Project that we fund. This tax season, 1,380 users received their earned income tax credit for a total of over $2 million in Federal refunds through this program, which impacts the quality of their life, as you had talked about earlier; 47 percent of these users e-filed, which means that they had access to an e-mail account, and 56 percent of users accessed TIG directly through the Internet, which helps to validate our loans that client have access to the web-based tools that we are funding.

I had mentioned the website evaluation tools earlier, and I want to elaborate on them now. This past fall, LSC implemented a standardized evaluation system for website Grantees. To date, two states have completed these tools, and several more are ready to begin. Our goal is to measure the success and challenges of these projects and to provide national statistics regarding use and quality. For the first year evaluation, programs are requested to complete a web-based statistics form, an outreach checklist, an access challenges assessment and a community provider survey. We're in the process of developing tools to evaluate the second-year grant and hope to have those online, downloaded and available, for use in June. The Iowa program recently completed the web-based statistics program and reported that a six-month

period of time between the month of July 2003 and January 2004 they received 12,226 visitors and that 10,505 documents were downloaded. And they, themselves, were pleasantly surprised by these encouraging numbers, as well.

We just want to wrap up by talking about the current TIG cycle, just to let you know how that's going to play out throughout this year. Currently, LSC has $2.9 million allocated for TIG projects. The deadline for filing applications in this round is May 14th, so about two weeks. We'll be reviewing applications in the months of May, June and early July, and the first slate of recommendations will go to the Vice-President for programs toward the end of July. The President will approve funding in the early fall, and the award letters will be distributed to programs shortly after and the first checks for the initial payments on these grants will be cut in December. Our, an all TIG conferences will be held in January, and this serves as a training and project planning session for our Grantees.

MS. RABY: And I'm going to jump in. There's one other thing I wanted to mention.

Again, going back to how we were working with Grantees to ensure access. We funded in last years 'round two technology advocate positions. Those positions are

designed to begin to address a couple of different things in terms of the client community. The best example I can give you is when telecommunications services are distributed throughout the country, typically rural communities are overlooked because they are not high-density areas.

One of the things that we're asking for your technology advocates to do is to look at ways to encourage that kind of dissemination of service an not just dial up services, but high-band, with very useful service, to low-income and rural communities. And, so, the positions are designed to begin to address or identify opportunities to have an influence in how policy and procedures that other tele-, that in the telecommunications industry might be influenced by having a voice at the table.

Go ahead and finish your lessons.

MS. BATEMAN: Thank you, again, for letting us speak to you today. If you have any questions, we'd be happy to answer them now or at your convenience.

MR. HALL: Thank you. Questions from the Board?

MR. DIETER: Looking forward, $2.9 million, say you were to get that amount appropriated every year, how much of that would be used just to continue this, the maintenance of the websites; do you know? As an ongoing annual cost.

$50,000, and ^it's ^ its a partnership with IOLTA to look into

ways that programs can begin to look at sustainability --

whether it's through fundraising or through looking at the

site, in general -- to see where there are opportunities

to find funding, other than LSC dollars.

MS. RABY: So we're trying to come at it from two

different ways. I guess that's up to you, sir.

MR. HALL: Other questions? First --

MR. DIETER: Well, this is -- sorry. As you

maintain the website, does the cost go down in information

and technologies and, you know, it's not quite as

labor-intensive? I mean, you can always sort of expand.

MS. RABY: some of the costs do level out. Part

of what happens, though, is because content expires and

because you need to -- you still have to maintain some

staff involvement in the development and maintenance of

the content which requires -- and I say this with a

greatest amount of affection -- harassing attorneyss to

finish up and give us th e --

MR. HALL: Yeah.

MS. RABY: -- new content so we can load it on

the website, some of it is that; some it is not wanting to

stop in the development.

If we're going to recreate a system where

Grantees can begin to sample their own file-ready

documents, if you will, either for advocates or as

something we could do for clients, that requires some

additional development on templates which that investment

gets distributed to everyone using that particular

template. So we're only making sort of two individual

development instead of making 50 --

     MR. DIETER: Yeah.

     MS. RABY: -- or 57. However, those -- our hope

would be to continue to be able to support that

development so that our templates continue to be

positioned to take advantage of technology's advancements

as they come down the pike. So I don't think we have a

good rule of thumb right now for what that cost might be

over the long-term. I think we're overlooking at the last

four years of funding, I think 23 percent is probably the

best I can give you, just for website sustainability. And

then there's probably another chunk of money in terms of

other support mechanisms that allows those websites to

continue to evolve.

     MR. HALL: One more.

     MR. MEITES: I have a, an inventing-the-wheel

question. I know that you talked to us before that you

suggested template web design, but what tools does the

Legal Services Corporation have when you find a good idea

like Cincinnati had to let the other Grantees know about

it and, indeed, encourage them to use it?

MS. BATEMAN: We have a website that we call Larry. It's www.lri.lsc.gov, and it shares best practices. So we post a lot of content there. We also have training sessions and we attend national conferences to get the word out.

MS. RABY: Well, and the TIG Conference has served as, really has become, in some ways, the technology conference. And there was two tracks this year, and there will continue to be tracks to new first-year website Grantees and then to advanced Grantees. And it was actually four because there was four for each website template.

So there are, also, as part of the template support, there are listers that all of the web content coordinators participate in. The circuit writers are invaluable in disseminating best practices from one from program to another program because they visit all of the programs in a rotating fashion. They become a resource. We've done a lot of stuff around the National Technology Assistance Project which does a lot of training around different technologies, but also around how do you deal with your stakeholder committee, how do you -- what's the best way to set up a protocol around maintenance, making sure that your content is current and accurate. Those are

the systems which we have to keep in place.

MR. MEITES: Thank you.

MR. DIETER: And I have one more. In terms of our own internal reporting making it easy on Grantees and this idea of training, you know, data transferability -- I mean, are you all looking at that sort of web compilatin statistics at once, or is it all --

MS. RABY: ^it's ^ its sort a, of an inadvertent --

MR. DIETER: Inadvertent.

MS. RABY: Thank you, sir -- advantage of the evaluation project, as we created all of the evaluation, website evaluations and we hope, eventually, all of the websites, or all of the evaluation tools that we used as part of evaluating technology projects in the TIG Program.

Right now the website stuff is all online, so Grantees actually log onto our website, they submit all of our information, and then we'll receive it in an electronic fashion and compile a national statistics base around that.

I think that as part of that process we might learn a lot about how we might be able to use -- get them to do additional reporting using those kinds of methods. And I think -- and I'm going to defer to your prior experience and competition , if you can talk a little bit about developing the system of the other data in basic

field of electronic system.

MS. BATEMAN: ^it's ^ its all done through an online
collection system, as well.

MR. DIETER: Well, today we were in the Maryland
Office. they were generating some sor t of
compute-generated, you know, hotline of their call. Is
that --

MS. RABY: Hmm.

MR. DIETER: -- you know, stored in ^83away ^ a way that is
easy to extract information that -- would that be the same
as some other office or not?

MS. RABY: I think that's part of what we're
trying to figure out --

MR. DIETER: Okay.

MS. RABY: -- is the best way to go about doing
that. And some of that is the front-end work and
establishing what the standard is --

MR. DIETER: Mm -hmm.

MS. RABY: -- you know, what -- and getting a
large group of people to agree.

MR. DIETER: I see.

MS. RABY: It's really, it's sort of where we're
in the midst of that struggle right now, to create some of
those standards.

We do have the pilot project in Washington that

does the electronic referrals. ^it's ^ its from a task

(phonetically), which is their case management system

creates an electronic record that has all the intake

information that is posted to a website. So the referring

agency, which is a pro bono, IOLTA-funded pro bono

program, receives an e-mail saying you have a case that's

pending on this website. They go to that website; they

pull that information down. If they accept that case, all

of that information is automatically transferred into

their case management system.

     So that's sort of the, that's the arena in which

we have begun to try to figure out how it works. It's not

really trickled over into CSI reporting or the broader

company.

     MR. HALL: Any other questions? Well, thank you,

very much.

     MS. BATEMAN: Thank you.

     MS. RABY: Thank you for the time.

     MR. HALL: All right. Our next item is public

comment, and I would open the public comment on

technologies.

     Hello.

     TELEPHONE OPERATOR: Hi. This is the Switchboard

Attendant, and I was wondering if you were ready for me to

try ^84too ^ to get Tom Fuentes.

MR. HALL: Probably not. I think he wanted to

come in on the Finance Committee, so --

TELEPHONE OPERATOR: Okay.

MR. HALL: -- and that's probably about --

MR. MEITES: Should we let them know, ^maybe ^ may be 10

minutes?

MR. HALL: Yeah.

TELEPHONE OPERATOR: See, I haven't called him

yet --

MR. HALL: Okay.

TELEPHONE OPERATOR: -- so --

MR. HALL: I think we, we're going to have to

take a break --

MR. MEITES: Yeah, I thought we should.

MR. HALL: -- So it would probably being in about

10 minutes.

TELEPHONE OPERATOR: All right. You can just

dial zero --

MR. HALL: Okay.

TELEPHONE OPERATOR: -- when you're ready.

MR. HALL: All right. Thank you.

TELEPHONE OPERATOR: Okay.

MR. HALL: Is there any public comment? Hearing

none, is their any other business to come before the

Committee?

M O T I O N

.   MR. HALL: I would entertain a Motion to Adjourn.

MS. MERCADO: So moved.

MR. HALL: Provisions Committee's adjourned.

(At 4:20 p.m., proceedings concluded.)

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