

LEGAL SERVICES CORPORATION
BOARD OF DIRECTORS

COMMITTEE ON PROVISION FOR THE
DELIVERY OF LEGAL SERVICES

Friday, June 27, 2003

4:30 p.m.

The Latham Hotel
3000 M Street, N.W.
Washington, D.C.

COMMITTEE MEMBERS PRESENT:

Maria Luisa Mercado, Chair
Michael D. McKay
Florentino A. Subia
Ernestine P. Watlington
Frank B. Strickland, ex-officio

BOARD MEMBERS PRESENT:

Herbert S. Garten
Lillian R. BeVier
Thomas R. Meites
Thomas A. Fuentes

STAFF & PUBLIC PRESENT:

John N. Erlenborn, President

STAFF & PUBLIC PRESENT (continued):

Victor M. Fortuno, Vice President for Legal
Affairs, General Counsel & Corporate Secretary
Randi Youells, Vice President for Programs
Mauricio Vivero, Vice President for Governmental
Relations & Public Affairs
John Eidleman, Acting Vice President for Compliance
& Administration
Leonard Koczur, Acting Inspector General
Laurie Tarantowicz, Assistant Inspector General and
Legal Counsel
David Maddox, Assistant Inspector General for
Resource Management
David Richardson, Treasurer & Comptroller
Mattie C. Condray, Senior Assistant General Counsel
Michael Genz, Director, Office of Program
Performance (OPP)
Alice Dickerson, Director, Office of Human
Resources
Lisa Rosenberg, Congressional Liaison
David Hall, LSC Board Nominee (by telephone)
Cynthia Schneider, Deputy Director, Office of
Program Performance (OPP)
Joyce Raby, Program Analyst, Office of Program
Performance (OPP)
Glenn Rawdon, Program Counsel, Office of
Program Performance (OPP)
Jennifer Bateman, Program Analyst, Office of
Program Performance (OPP)
Julie Clark, Vice President for Government
Relations, National Legal Aid and Defenders
Association (NLADA)
Linda Perle, Senior Attorney-Legal Services, Center
for Law and Social Policy (CLASP)
L. Jonathan Ross, Chairman, ABA's Standing
Committee for Legal Aid & Indigent Defendants
(SCLAID)
Bob Rudy, Executive Director, Maryland Legal
Services Corporation
Elizabeth Ardledge, Communications Director, NLADA

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P R O C E E D I N G S

CHAIR MERCADO: This is Maria Luisa Mercado.

I will go ahead and call the meeting for the Provision for the Delivery of Legal Services Committee to order.

Are there any changes to the agenda?

(No response.)

CHAIR MERCADO: We approve the agenda as presented. All in favor?

(Chorus of ayes.)

CHAIR MERCADO: Opposed?

(No response.)

CHAIR MERCADO: The second item on our agenda is to consider and act on future activities for the committee. Mike, are you going to address that, or do you just want us to deliberate?

MR. GENZ: I would be open to the will of the committee. We're here to attest the second topic --

CHAIR MERCADO: Generally, the Provision for the Delivery of Legal Services Committee is actually one of the committees that I guess you get more closer to the field, because we do get a lot of the best

practices that are going on around the country in the delivery of legal services for poor people from the different programs.

And whether we're out in the field actually visiting -- as we did in Santa Fe -- the programs to see what kind of work they're doing, or whether we're here in Washington, both through our office as the program that's coming up, or other programs that come and present to us, but also, part of it is to make some long-term directions or improvements to the delivery of legal services as it occurs. And I'm not sure what the preference for the committee is, or whether the committee would want to maybe review some of the items that LSC is working on at this current time, or maybe take an overview of what it would want our staff, as well as other programs in the field, to look at or to present to us.

Are there any recommendations from committee members? And Mr. Hall, that would include you as well.

MR. HALL: I am having a little difficulty hearing. I don't know if there's anything that could

■ be done so that people could be closer to the phone or
■ mike. And I'm just barely able to follow.

■ MR. MCKAY: Well, for the record, we hear you
■ very well.

■ MR. HALL: Well, that's good. But I would
■ have nothing to say if I don't have anything to hear.

■ MR. GENZ: Madam Chair?

■ CHAIR MERCADO: Yes.

■ MR. GENZ: The Board book under the Provisions
■ section contains the report that Randi Youells
■ produced. It provides an overview of what the Programs
■ Division does. That might be a helpful reference for
■ the committee.

■ CHAIR MERCADO: And I apologize that I
■ overlooked thanking the staff, especially Randi, for
■ preparing this, especially for our new board members,
■ sort of get a sense of what the committees do. And I
■ don't know whether or not you've had an opportunity to
■ review that, whether you've had an opportunity to think
■ about what you would like to do.

■ I know that having said in the other committee

meetings earlier today that everyone is sort of taking a wait-and-see approach to sort of get themselves acquainted with all that particular committee does, and what pending actions are pending before the Board and before Legal Services as a whole to decide what areas they want to focus on.

Ernestine is our current outgoing chair. Maybe there is some inside that you would like to bring to that.

MS. WATLINGTON: I was very fortunate and honored, I guess, and privileged to chair that committee, because it meant an awful lot to me, because it allowed me the opportunity to, I feel, as which one of the key part of what the Legal Services Corporation should be doing in the client community, and that was really getting to working with the field, allowing Board members the opportunity to actually see what was happening in the different programs.

Because we, the ones that are out there, know what's going on. But the corporate world, you know, they come to Board meetings and everything, but they

■ still really don't have any idea or feel what it's like
■ being a client out there. And they were talking today
■ about the cost of -- the price of lawyers, like 360 and
■ 400 or so dollars an hour. We definitely can't afford
■ that.

■ So Legal Services is important to us. And it
■ has really been a pleasure to have the Board members to
■ actually visit those programs, like you were able to do
■ in Santa Fe. I think that has been one of the -- you
■ know, very important, and actually see what is actually
■ happening, and what you are providing, and what you're
■ doing by coming to the Board meetings, and what is
■ actually happening out there in the field. Otherwise,
■ you don't really get an opportunity to see that.

■ And that's why I think that the Provision
■ Committee is really -- you know, I liked it when we
■ were in Seattle. So many times, that committee has
■ allowed Board people to actually see what is happening
■ in other communities, and the ones that don't know, see
■ what is happening in the communities. I think that's
■ really important. I just wanted to add that.

MR. MCKAY: You enjoyed Seattle, too, didn't you?

MS. WATLINGTON: Extremely.

CHAIR MERCADO: Yes, Mr. McKay.

MR. MCKAY: I think the -- I'm happy that the first thing that we address is, you know, what is it that we're going to be doing as a committee. And I feel like I still need some time to think about it. I think we ought to wait until our new Chair is confirmed and brought on board so that we can work with him on this.

But I do have a document. It was a resolution approved by the previous Board in 1995 -- May 12, 1995 -- which set forth the responsibilities of the different Board committees. And I look at the definition that was adopted then to be a good one for this committee. But I think that would be a good starting point for us as a committee. And I'd be happy to have copies made and maybe hand it around, or we can send it off to the committee members for this intervening period of time.

■ In fact, I would recommend to the Chair that
■ we even consider doing this for all the committees, but
■ certainly for our committee, since this is the topic of
■ our conversation, that we perhaps start with this. And
■ then maybe at our next meeting, after we have a chance
■ to reflect, come up with our own charge that we propose
■ to the entire Board.

■ MR. HALL: Sounds good.

■ CHAIR MERCADO: Sounds good. And I by no
■ means -- and that's why I specifically asked Mr. Hall
■ for recommendations, because it would be good. And I'm
■ sure that our staff would be available to discuss with
■ any members of the committee any proposed topic areas
■ that need to be dealt with, especially, you know, Randi
■ Youells, who's the program vice chair to deal with that
■ area.

■ So having said that -- and I know we have
■ several eager presenters at the table.

■ MR. STRICKLAND: Madam Chair --

■ CHAIR MERCADO: Yes.

■ MR. STRICKLAND: -- before you start that, if

I may take a moment. I've just been informed by Mauricio Vivero that the United States Senate confirmed David Hall today.

CHAIR MERCADO: All right.

(Applause.)

MR. STRICKLAND: And also formally confirmed Lillian BeVier, who is serving under a recess appointment and has already been sworn in. So both of those confirmations have been made.

(Applause.)

MR. STRICKLAND: I think David is on the line, so I wanted to make sure you were made aware of that as soon as possible, David. Can you hear us?

MR. HALL: Yes, I did. I did hear that. And thank you very much for passing it on. It's good to be over that threshold.

MR. STRICKLAND: Well, I understand the feeling. And I would suggest to you just while we're on the phone here, if you can make arrangements on your own, I think that the president probably has to sign your appointment certificate. I've forgotten what the

■ sequence is. But whenever the sequence is completed,
■ if you could make arrangements to get sworn in sometime
■ soon, that would be helpful all the way around. But
■ thank you for that moment to --

■ MR. HALL: Thank you.

■ CHAIR MERCADO: That's wonderful.

■ MR. STRICKLAND: And congratulations, David.

■ MR. HALL: Thank you.

■ MS. WATLINGTON: I can't believe -- I really
■ have to commend Mike here for doing his homework. Can
■ you imagine bringing up the committee to one thing that
■ was produced in '95? That's really doing a lot of
■ reading.

■ (Laughter.)

■ MR. MCKAY: Vic gave this to me earlier.

■ (Laughter.)

■ MR. MCKAY: Thank Vic for doing the work, not
■ me. I do take credit for reading it, though.

■ CHAIR MERCADO: We will now go to item 3 in
■ our agenda, which is a report by our Legal Services
■ Office of Program Performance on the three-year history

■ of the Legal Services' Technology Initiative Grant
■ Awards Program. And there is a slide presentation
■ behind you. And you've also been presented with a copy
■ of -- I would assume the majority of the presentation
■ is what we're presenting.

■ Go ahead. Mr. Genz?

■ MR. GENZ: Okay, that's correct. Thank you,
■ Madam Chair, members of the Board, members of the
■ committee. For the record, I'm Michael Genz at the
■ Office of Program Performance. We're here to talk
■ today about the Technology Initiative Grants Program
■ that, as the Chair stated, was established three years
■ ago in the year 2000.

■ Since that time, LSC has been striving to
■ utilize the TIG program to expand to the extent
■ possible representation of our client community.
■ Today's panel will tell us where we are on that path.
■ They are, from closest to me, Jennifer Bateman, Joyce
■ Raby, and Glenn Rawdon.

■ Jennifer will talk about her area, the web
■ site grants. And the other two, Joyce and Glenn, split

the other topic areas on the pro se and intake and infrastructure and technical assistance parts.

At this point, I pass the presentation over to Glenn, who will start it.

MR. RAWDON: Thanks, Mike. First of all, let's talk about the purpose of the Technology Initiative Grants. We want to promote the goal of increasing access for our targeted client community. As we've talked so often with the funding levels that we have, we cannot give full assistance to everyone. And so the aim of the Technology Initiative Grants is to reach out to the communities that we don't necessarily reach with full service or with the resources that we have.

I'm going to show you a quick clip here.

(Videotape is played.)

MR. RAWDON: What you've just seen is the beginning clip from our kiosk system that with our first round of grants in 2000 that we're building for the Navajo Nation and the Hopi Nation. You visited that area for the last Board meeting, and were able to

■ see some of the unique geographical challenges that
■ they are facing out in that area. Well, these types of
■ technology efforts are what we're looking for to reach
■ this other area.

■ We have three basic strategies that we've been
■ trying to do. One is to look for innovative technology
■ like we just showed you, presenting this information in
■ a spoken language with the Navajos, who would normally
■ not have access to any type of information on the
■ Navajo Nation.

■ The other is supporting state planning
■ efforts. Because as we worked to build the state
■ justice communities, we found that technology is a very
■ valuable tool for doing this. For one, people seem to
■ be able to come together and work on technology
■ projects even when, because of territory or other
■ things, they may have a little trouble working together
■ on some other issues. And also, with things like the
■ statewide web sites, which Jennifer will be talking
■ about later, it also gives them a way to work together
■ and a forum to use technology to bring everyone

■ together.

■ And the last strategy is by mobilizing
■ resources. And Joyce is going to talk more about what
■ we mean by mobilizing the resources.

■ Now, to give you a brief history, the first
■ congressional act was passed in 1999 to start the
■ Technology Initiative Grants in 2000, through our then-
■ president, John McKay. He was able to get specific
■ funding for this program so that, unlike the field
■ grants, which is just given out to everyone in equal
■ shares by population, this was a competitive process
■ for these grants.

■ And you'll see that the first year, we had
■ \$4.25 million. The second year, we had 7 million.
■ Last year, we had 4.4. In this year's process, we're
■ giving out \$3.4 million for technology grants.

■ What we've done here is try to categorize the
■ past three years' grants in different categories that
■ we've used. One is infrastructure. If you'll see, an
■ infrastructure type of a grant is many of our programs
■ are struggling with their technology needs. And so

■ we'll identify a weakness that they have, maybe that
■ they need a single case management system, maybe they
■ need a new wide area network, something like that,
■ something that will allow them to improve their
■ delivery of legal services, we'll help them with
■ something on infrastructure.

■ Another is for intake. Maybe they've got a
■ new way that they can do a hotline, but they don't have
■ the infrastructure to do that. So we will work with
■ them to try to improve the technology so that they can
■ do a better job with their intake, thereby offering
■ advice and service and access to the system to more
■ people.

■ The other is pro se. The Navajo system that
■ you saw there would be NA, which is our program that is
■ in the Four Corners area that you visited that has such
■ a large area using technology in that area. Another is
■ like the I-CAN system that many of you have seen -- and
■ we'll have some related statistics about -- where we're
■ putting kiosks in courthouses in California and
■ Oklahoma already -- and it's looking to expand to other

■ areas -- so that someone who comes into the courthouse
■ without a lawyer can get information to help themselves
■ when we can't help them.

■ The other is web sites, which Jennifer is
■ going to talk more to you about, and then technical
■ assistance. Many of our programs do not have
■ technology staff on board. Or if they do, they don't
■ know about different areas. There's a lot of different
■ areas in technology. So we've tried to build some
■ resources nationally that can help them help each
■ other, kind of a peer-to-peer network, if you will,
■ through LS Tech and INTAP to the projects that we've
■ done, so that people who do have the expertise will be
■ able to reach the people who do not so that they can
■ help each other.

■ Now, one of the things about this, you saw the
■ funding levels that we had. We've tried to leverage
■ this amount of money so that it actually winds up being
■ more money into the hands of the field programs.

■ For example, in this year's round of grants,
■ we had grant applications of about \$11 million. But

■ there's also \$2.5 million of non-LSC funding that's
■ been pledged in those grant applications from other
■ sources. For example, like the Massachusetts Justice
■ Project for the City Bar Fund of New York City have
■ pledged money to those grant projects if we decide to
■ fund them.

■ And also, what we found, too, is in many of
■ the applications, if we can't fund them all, we know
■ they're good applications, they'll be able to go to
■ other funding sources and find alternative funding for
■ these grant applications, so many of those get done
■ even without our money.

■ Also, if anything is developed with the
■ Technology Initiative Grant, then it is available not
■ only for the program that developed it, but to any of
■ our other programs for little or no cost. So that if
■ we pay for something once, then it goes to everybody
■ else in LSC so that they can have the same technology.

■ Also, although we don't require matching funds
■ -- in other words, when they apply to us, many grants
■ require that you have matching funds to get the grant -

■ - we don't require, but we encourage it. So we
■ maximize the resources by giving extra points to those
■ who are creative enough to go out into the community
■ and find other funding sources for their projects.

■ MS. RABY: I'm Joyce Raby. I'm going to take
■ the next couple of slides.

■ I wanted to hit some of the highlights around
■ the competition process. Number one, we only give
■ awards to LSC-funded programs. Only LSC-funded
■ programs can apply.

■ I also wanted to say that one of the things
■ about a competitive process that we found is not only
■ does allowing programs to compete for funds mean that
■ we fund the best projects and applications that are
■ filed, but it also means over the course of the
■ history, the applications in general, the quality,
■ we've seen it go up. As people get a better idea of
■ how to put together a technology project, they get
■ better ideas about how to do project management.

■ The other thing I want to say that I think is
■ critical to the way that TIG grants are managed is that

the payments on TIG grants are incremental, which means that there are specific sets of tasks or milestones that are set out before the grant is ever awarded that indicates that you'll get a chunk of money when you start, and then you get another little chunk of money as you accomplish specific tasks along the road.

And what that means is we stay in a lot of contact with our grantees as they report to us that they've completed milestones. We review that information. We then process payments, or we look for more information. But it means there's an ongoing give-and-take between us and all of our grantees.

Just some brief numbers here about how the process works. We have received, including the 2003 folks, 363 applications in the last four years. That would include 106 received in the current round. Glenn mentioned that we had requests in the current round for \$11 million. If you look at all of the requests for the last four rounds, that would be almost nearly \$60 million that people have asked for.

We have grants located in 52 states and

territories. We have awarded over the last three years a total of 141 grants, for a total value of over \$15 million. And of those 141 grants, 9 grants have actually completed. So we're still managing on an ongoing basis 132.

When we talked about mobilizing resources, part of what we want to talk about is how that having additional funds, particularly around a specific project like technology, actually lets our programs strengthen their relationships and the entire justice community in which they serve.

For example, Alaska put together an application last year that wanted to fund six self-help work stations in courthouses around Alaska. We funded the portion of the project that was the creation of content. They had matching funds from all of their courts to put in the computers, to maintain the computers, to service the computers. So it was a great partnership where everybody contributed a little bit, but we really made a big difference in Alaska.

One of the other projects is Ohio. They were

■ funded in 2000 to put together some specific document
■ assembly products to help assist victims of domestic
■ violence. They had a lot of assistance from the
■ domestic violence community in creating that content,
■ and also in creating access points for people to be
■ able to get to that system. There was a lot of
■ training that went on around lay advocates to insure
■ that people would be properly assisted when using the
■ web site.

■ Washington was funded last year to do an XML
■ project. And XML, we'll talk a little bit more -- or
■ Glenn will touch on later in the presentation. But
■ XML, if you'll think of it as just an envelope in which
■ we're going to put some information, and we're going to
■ send it from one location to another so everybody can
■ see it.

■ But an electronic referral works that way.
■ The LSC-funded program in Washington is going to take
■ their intake information, they're going to put it
■ inside an envelope, and they're going to send it to all
■ of the IOLTA-funded programs. And they're going to be

■ able to use their systems, but the data will be input
■ directly into their system. And what that means is
■ they can call the 1-800 number, any client in
■ Washington. They can go through the intake.

■ But when they get referred, if they're
■ referred to an IOLTA partner, that referral is
■ seamless. It's electronic. It means that it's not
■ something that somebody prints out, goes over to the
■ fax machine, puts it in the fax machine, sends it to
■ that office, somebody else takes it, and then has to
■ input all that information manually.

■ So it's just a way in which we're also making
■ it easier for clients, but we're also making sure that
■ the partners and folks are all working together in the
■ most cost-effective and efficient manner.

■ We've also done a lot of work around national
■ standards. XMLs comes up here again. Where once we've
■ created standards around how data can be transferred
■ from one program to another, that information can be
■ used by every program, whether it's an LSC-funded
■ program, an IOLTA-funded program, or someone else's

■ funded program. It means that all the providers in a
■ given community can work together really effectively to
■ serve the one target client community we're all trying
■ to serve.

■ A web index really means that we're putting
■ together a way to index information on all of our
■ statewide web sites so that when someone goes in and
■ inputs a search term, it will be able to search not
■ only those things that geographically make sense, but
■ if there's additional information that might be
■ available in another community, that information comes
■ up as well. When you get into content at the national
■ level, like bankruptcy, where it would be the same
■ round all over the country, it will pull from anywhere
■ that there's bankruptcy information.

■ That has a benefit for clients. It also has a
■ benefit for advocates who will be working with other
■ colleagues. When they go in and want to use web sites
■ or try to find information about a specific topic,
■ they'll not just be searching their own local
■ community, but they'll also be searching the national

community, which means that expertise and knowledge get shared nationally, not just within their own local community. It's a way to break down those barriers and insure that people are getting the best information available.

Evaluation. We've really, in the last year, started to fund some serious projects around creating a set of tools for our grantees to do evaluation. We're very concerned that technology projects be evaluated in a way that we can judge the value of the investment that we are making. We wanted to do sort of national standards for two reasons.

One, we felt like grantees needed a lot of assistance around evaluation. It's not something that there is a lot of expertise on staff in most of our local programs. So we wanted to put sort of a tool kit together so that people would have a place to go to get some information. It would be good information. We would know they were good tools.

The other reason we wanted to do that was so that we could sort of require some of the tools be used

over and over again for like projects -- for example, statewide web sites, infrastructure grants, pro se grants. For doing multiple things around, say, kiosks, wouldn't it be great if everybody evaluated those using the same instruments, and then we could compile a list of comparisons, some national statistics. It allowed us at the national level to maybe create some additional statistical information that would be really useful to us.

And, of course, one of the great sort of standards that we'll talk about a lot and you'll hear us often plug is the statewide web sites. And at that point, I'm going to turn it to Jennifer.

MS. BATEMAN: I'm Jennifer Bateman. I'm going to be discussing the statewide web sites over the next five to ten minutes.

In the first TIG cycle, which was in 2000, LSC received numerous applications from programs who wanted to implement a program web site. The average application was for 75,000, and the request was to utilize the funds to hire a web developer.

LSC recognized the necessity to implement web sites and envisioned how this could make an impact on state justice communities, and set about to create and fund templates that could be easily adapted by each state. By creating templates, the cost could be kept at a minimum, programs within the state would not have to build from scratch, and each program would have access to the expertise needed to develop a practical and useful web site.

These templates have been incredibly successful. To date, LSC has funded 46 sites. These sites cover states and territories, and they also encompass regions that serve special populations, such as the DNA program site that serves Native American clients in the four-state region.

In the 2003 round, we have applications for two more states, a territory, and the District of Columbia, leaving only six states or territories that have not applied for web site funding. The states are successful because they maximize resources, and in essence, serve more clients more effectively.

Each statewide web site is required by LSC to have a stakeholders committee that is comprised of LSC and non-LSC-funded programs, social services programs, the courts, the bar, local libraries, and any other organization that impacts low-income people in the state. With this client-centered approach, LSC clients have access to the most comprehensive array of services available in their communities.

Additionally, the LSC programs themselves benefit from this distribution of resources and the valuable communications shared as a state justice community.

I'd like to talk a little bit more about the templates themselves. Each of the templates has three basic components or phases that are built. There's a client resources section which contains content-related pro se advice and forms, legal advice, and referral information. This section of the site also has links to other services provided within the state to low-income people. It also generally has a searchable page where a client can obtain information about attorneys

■ providing services in their region cataloged by ZIP
■ code.

■ The next section of the site is the pro bono
■ resources section. This area is used to recruit and
■ retain attorneys. It contains a section where private
■ attorneys can sign up to volunteer with a particular
■ program in the state. It allows the program to assign
■ available cases to volunteers using remote access, and
■ they can use the system to communicate with one
■ another, inform private attorneys about available
■ cases, have access to a CLE calendar, and mentor our
■ new volunteers.

■ And the final component is the advocate side
■ of the web site. This section serves as an education
■ tool for attorneys, paralegals, and law school
■ students. It contains briefings, pleadings, forms and
■ information about training sessions.

■ In 2000, during the pilot phase of web site
■ funding, LSC sponsored the design of two different
■ styles of templates. The states of Ohio and Maine
■ needed a more customized site, and they had the in-

house expertise to support that. They worked with KEVO, a web site vendor, to build their sites.

In the states of New York and Minnesota, they utilized the Law Help template, which was designed by a web site vendor called ProBonoNet. Their sites are housed on a single server using an ASP -- Application Service Provider -- mode, and require very little in-house staffing for design. The program's web site coordinator focuses mainly on development of content for the site. Using this model, enhancements can easily be added to the site that benefit all the other states using the template.

I wanted to show you a sample of a site that's completed and has comprehensive content. So the example that I chose was the State of Georgia. It's hosted on the ProBonoNet template. You can see on the top of the page the excellent use of branding. The web address can be located prominently on the top of every page, so that even as clients click through each section and look at resources that are LSC, non-LSC, or social service agencies, that they know they have never

left the site. The program also cleverly used the Georgia peach in their logo.

They used information mapping on this first page, and lists very visibly all the priority areas and services that the participating programs cover. We'll click on the disability link. On the disability page, you'll notice that there are several categories. We're going to choose "Discrimination Against People with Disabilities."

The Georgia site has eight resources listed in the "Know Your Rights" section. But you'll notice along the top that there are several other tabs. You could click on "Self-Help Resources," "Community Help," "Find a Lawyer," or "Find a Court." We're going to click on "Find a Lawyer."

You'll come to a search page, and you can either input your ZIP code or select a county in your area where you would like to locate an attorney. I scrolled down and selected Jefferson County.

On this page, seven resources were available for that county. And if you're not satisfied with the

■ results, you can easily begin your search over again
■ along the side of the page by entering another ZIP code
■ and narrowing down your options.

■ This site is easy to navigate. The content is
■ generated at a literacy level that is accessible for
■ people who may not have a high reading level, and it
■ covers numerous legal issues.

■ I also wanted to show you the Oregon site,
■ because it is completely bilingual. They have all of
■ their content in English, and they utilized attorney
■ volunteers to translate all of that same content into
■ Spanish.

■ Now we're going to go to the Hawaii site.
■ They also used the Law Help template, but they have
■ customized the layout. And as you can see, it's got a
■ more polychromatic feel to it, reflecting the
■ population and culture that the programs in that state
■ represent.

■ The last sample that I wanted to post is the
■ main site, and it's an example of the KEVO template.
■ This site had conducted groundbreaking research using

■ search terms to tailor content to fit the needs of
■ their clients. The program currently tracks and
■ analyzes term search during a client session on the web
■ using a search log. Staff review the log regularly and
■ verify that clients are finding results that are
■ appropriate to the terms that they use in their search
■ for information.

■ In instances where it's needed, the program is
■ able to add key words or descriptive pages to improve
■ the accuracy of searches to those pages. They can also
■ add content that is frequently searched or that isn't
■ currently available on the site.

■ They also tag content with category synonyms
■ instead of exact matches. An example of that would be
■ instead of using "spouse" and having it be an exact
■ match, it would also reference "husband" or "wife."
■ And they generate that through search logs.

■ I'd like to wrap up my section on web sites by
■ sharing the progress to date on these grants.
■ Approximately 21 states are at the beginning stages of
■ their web site. New states are forming their

stakeholders committee, developing content, and determining site protocols.

Approximately 17 states have completed and launched the client resources section of their sites and are beginning work on other major sections. And we have eight states that have completed all three components of their sites.

MS. RABY: So we're back to me. I'm going to talk a little bit about the fostering of collaborations. As I spoke earlier, we often looked for programs where -- or projects where we get actual money from somebody else in rotation portion. I wanted to talk a little bit about projects specifically where it wasn't a matter of money, it was a matter of ongoing support, maintenance, and collaboration.

Utah, for example, has a great relationship with their court. They're one of the programs who's elected not to use one of the statewide web site templates, because they partnered very early on with their court's web site. And so they created a pro se web site off of their courts that allows clients to --

pro se clients to request a document review from a volunteer attorney.

I can talk a little bit more about that. But the important point, I think, here is that the court has agreed to a long-term relationship with Utah Legal Services in that they are going to maintain the web site. They're going to keep it up and running. And that's a partnership that's really proven to be critical in the delivery of this particular self-help technology.

Montana has a great relationship with their bar associations and their law schools. We funded a video conferencing project in Montana, and the bar association has worked and offered to create an additional site of video conferencing on the agreement that everybody would share all of the sites. So the bar association in its rural state like Montana was trying to find ways to make sure that attorneys around the state would have an opportunity to participate, as well as volunteer, and they offered to create some sites for the Montana program if everybody agreed to

■ sort of share the infrastructure.

■ Following along the same lines, Maine created
■ a partnership with TeleMedicine, which is a program in
■ Maine that creates video conferencing sites so that
■ rural people in Maine can "see a doctor," be diagnosed
■ with medical problems. And they agreed to share their
■ sites with the Maine Legal Services Program if Maine
■ agreed to implement a couple of their video
■ conferencing sites.

■ Hawaii put together a partner -- seven or
■ nine, it says there -- nine-partner organizations and
■ created an integrated intake and referral system so
■ that they all shared their intake in a way that allows
■ everyone to do intake not only for themselves, but for
■ everyone else in the community.

■ So those are all collaborations where there
■ are strong binding relationships that are ongoing, and
■ there's a serious commitment to maintain them into the
■ future.

■ That's the last slide for me. I wanted to
■ talk just a little bit about access points. It's a

■ question that comes up a lot as we begin to implement
■ some of these technologies. And we've been working a
■ lot with our grantees to insure that not only are they
■ creating information on the web, pro se technology that
■ allows people to help themselves, as well as kiosks and
■ other sorts of points, but that they work with their
■ local communities to come up with as many places as
■ possible for low-income people to actually find an
■ access to this information.

■ I wanted just to bring to you a couple of
■ examples. In Iowa, Iowa got a grant from us that was
■ matched by the top program out of the Department of
■ Commerce, and the Department of Commerce portion funded
■ 85 work stations located in senior citizen centers
■ around the State of Iowa. So once again, that's not
■ our money, but it was money that we leveraged that
■ created additional access points for our clients not
■ only to get legal services, but also to get other kinds
■ of services they may need.

■ I already sort of pointed out the Alaska
■ example, where they created six work stations. They

also recently just within this last week got an award from the Beaumont Foundation to put in an additional 10 sites around Alaska to use the same content and the same services that they're creating for the courts.

I came up, just doing a very cursory sort of survey of our programs this week, with 137 access points, specific new locations that were created just because we did a technology project in a community that they spawned other technology projects. And I hope to see, certainly, that number go up.

Back to Glenn.

MR. RAWDON: We wanted to wrap up with talking about what TIG does for clients, because that's why we're doing it. I mean, we're not doing it because we like to play with all the funding toys, and we like to have cameras on all the desk tops and everything. Okay, we do like that, but that's not why we're doing it. We're doing it to help clients. And we wanted to show you, as Joyce did with the access points, some of the statistics.

You've all heard about the I-CAN project, I'm

■ sure, that was done in California in Orange County,
■ where they put in the kiosks and all. Well, these are
■ the statistics to date. Now, these are not just people
■ that have visited this. These are pleadings that have
■ been generated. So with this one project -- in
■ California, that started -- over 16,000 people have
■ been able to go into the courthouse and help themselves
■ to do their own pleadings in English, Spanish, and
■ Vietnamese. This is something that is really working
■ that is really helping people.

■ The next slide is a projection that was done
■ on web site usage. Now, I want to explain this a
■ little bit to you. When we say year 1, 2, 3, 4, and 5,
■ what we're talking about is upon the completion of all
■ 50 states having statewide web sites, taking usage from
■ existing web sites and projecting that, you can see
■ that there's a low number here, less than a million, in
■ the first year of low-income people that will be
■ visiting these web sites. But by the end of five
■ years, the projection is there will be 16 million
■ visits -- or I'm sorry -- I think that's almost 18

million visits to these web sites by people helping themselves on the web sites.

And this doesn't count the number of people who are not low-income that will also be coming to these sites for assistance. Because one of the beauties of these technology projects, like the web sites and like I-CAN, is it doesn't matter what your income is. If you come into the courthouse and you need help, you can get assistance there.

And so we think this will be good for public relations. We had a study a few years ago that talked about legal services is not always that well-recognized by the public. But if they get used to going to our web sites and finding all this useful information, then we think it will be very good for the public image of the legal services programs around the country. And it is reaching clients, and that's why we've been doing it. And we'd be happy, if you have any questions, to be --yes.

MR. MEITES: I saw in one of your early slides where there are three basic components to the template?

MR. RAWDON: Yes.

MR. MEITES: And one of those is available cases. If I understood what you said, that an attorney who signs up for a program can get up in the morning, get on his computer, and see which cases he wants to take. Is that what you're saying?

MR. RAWDON: A pro bono attorney that has a particular interest can log into this section, look at the cases in their area, and say, "Gee, I like the facts in this case. I'm going to offer to help that person."

MS. RABY: And I would preface that as well to indicate that these are people who have been trained, preauthorized, have a password. I mean, there is a context in which that happens. That's not just Joe/Bob attorney wakes up one day and decides to volunteer.

MR. MEITES: So instead of the Legal Aid Office having to get on the phone and call their hundred favorite people and ask for a favor --

MS. RABY: Right, yes.

MR. MEITES: That's terrific.

MR. STRICKLAND: May I ask a question about -- let's just assume that a person comes into a kiosk and gets on the web site. And I think you said something about the presentation being designed for -- to make it easy to understand. I would presume that would be the case.

But for example, in the slide you put up about I-CAN usage, there's a large number of -- well, the three biggest uses were domestic violence, fee waiver, and paternity petition. So if a person comes in there into the kiosk and calls up, say, domestic violence -- that's the problem they've got, let's say, they've got a domestic violence problem in their home. They come in and -- sort of walk me through that. What do they end up with? In other words, do they get a pleading that they're going to file pro se? Is it established?

MR. RAWDON: There are several different things they get on that, for one. One, they'll get a video they can watch that talks about steps they should take and ways that they can protect themselves. Another is they'll get a sheet that prints out these

■ steps that they should do to protect themselves.
■ They'll get a protective order then that they can walk
■ over and file with the court. And there's also a court
■ video that they can watch that shows them what they
■ should do, where the courthouse is -- it even tells
■ them where to park -- so that when it's time to come
■ back to court, they'll be prepared.

■ MR. STRICKLAND: Is it fair to say that the
■ local court system has been made aware of the existence
■ of the kiosk, and that --

■ MR. RAWDON: They're in the courthouse.

■ MR. STRICKLAND: Oh, they're in the
■ courthouse. I'm sorry. That's obvious.

■ MR. RAWDON: Yeah. The court is very
■ supportive of this.

■ MR. STRICKLAND: Okay, good. I'm sorry. I
■ missed that point. I was imagining a situation where
■ kiosks were located elsewhere. I guess I'm thinking of
■ different kinds of kiosks. Obviously, if it's in the
■ courthouse, the court is supportive of it.

■ And in addition to being knowledgeable about

■ the existence of the kiosk, the court system
■ understands that people are going to be taking
■ pleadings off the system and filing them on their own
■ and acting pro se and so on. So that's going to be
■ widely accepted, I presume.

■ MR. RAWDON: We have three or four different
■ applications in this round of people who want to expand
■ I-CAN, our programs. And in every one of those, the
■ courts are partners in that, and want them there, and
■ want them in the courthouse.

■ MR. STRICKLAND: Unfortunately, there are some
■ judges around the country that don't behave themselves
■ too well. I mean, they can be rude to people
■ presenting themselves to the court. And I would
■ certainly hope that if a poor person presents himself
■ or herself in court with a self-prepared pleading, that
■ they're going to be treated with courtesy and respect
■ and helped through the process.

■ I mean, there are many, many judges, of course
■ -- fortunately, I think a majority of judges -- when
■ they have a pro se appearance, they recognize that and

■ accommodate that person. Is that your understanding of
■ how things are working where you've got a kiosk-
■ produced pleading being presented by a pro se?

■ MR. RAWDON: Where we have the kiosks, we have
■ very good support from the judges. There are other
■ areas where maybe something that's produced on the web
■ site, where we're working to try to do that.

■ Randi Youells last summer appeared before the
■ Conference of Chief Justices and Court Clerks, and in a
■ three-hour session with some other experts on this.
■ And it was very well-attended by chief justices from
■ all around the country learning about the pro se
■ efforts that we're doing, and asking us what they can
■ do to partner with our programs in their state. They
■ all recognize what a drain on their resources pro se's
■ can be, and many of them are recognizing how important
■ it is that pro se's have the information they need to
■ proceed smoothly through the courts.

■ That doesn't mean that it's reached everyone,
■ but we're seeing very good support and growing support
■ from the court community on this.

MR. STRICKLAND: I guess it's conceivable that a person could go into a -- well, take the State of Georgia, for example, has a dominant city. And when you move out from the metropolitan Atlanta area, things get rural very quickly.

A hypothetical case. Somebody from a rural county visits a courthouse where there's a kiosk and gets a pleading, and then drives 200 miles south and files that pro se pleading in a courthouse in rural Georgia. Is it likely or unlikely that that particular court is knowledgeable about the existence of the kiosk, the web site, and the availability of pleadings for pro se filers? Or is that too wild a hypothetical?

I mean, I just made that up.

MR. RAWDON: No, I don't think that's too wild. But it's difficult to say, because it's going to vary from place to place.

I know in California, the Administrative Office of the Courts is trying to expand I-CAN to every courthouse in California. So I'm assuming there the judges are more likely to know about the kiosks than

■ they might in Oklahoma, where the only kiosk is now in
■ Tulsa County. And being from Oklahoma originally, I'm
■ sure when you get down to Hugo, the judge down there
■ probably doesn't know or care what --

■ MR. STRICKLAND: Right. That's the example I
■ was thinking of.

■ MR. RAWDON: Yeah. We've got a lot of
■ education to do on this.

■ MR. STRICKLAND: Right.

■ MS. RABY: And I was going to say we didn't
■ talk a lot about document assembly, which is an
■ initiative we're currently working on. But part of
■ that creating those kinds of pleadings using some sort
■ of an automated system does require that you take into
■ account all of the little local county rules. So while
■ the local county might not know, you know, how you got
■ this pleading, it will be compliant with the local
■ county rules. I mean, that's been part of the thing
■ that people have worked out as they go through this
■ process.

■ So that when you select a particular

■ geographic area, you are going to be compliant with
■ whatever those local rules are. So they might be
■ surprised, but at least it would be a fileable
■ document. I mean, from a technical format
■ presentation --

■ MR. STRICKLAND: Right. It could be rejected
■ on the basis that it's a flawed document because it's
■ designed to fit the system.

■ MS. RABY: Right. Yes.

■ CHAIR MERCADO: Any other questions?

■ (No response.)

■ CHAIR MERCADO: Anything else from the panel?
■ Mr. Genz?

■ MR. GENZ: No. Thank you very much.

■ CHAIR MERCADO: Thank you all.

■ MR. STRICKLAND: Very informative. Thanks
■ very much. And thanks for answering my wild
■ hypothetical.

■ CHAIR MERCADO: Item 4 on the agenda is to
■ consider and act on other business. Is there any other
■ business before the committee that people want to bring

■ up? No?

■ (No response.)

■ CHAIR MERCADO: Public comment? Any of our
■ members of the public make any comments? No?

■ (No response.)

■ CHAIR MERCADO: I will now entertain a motion
■ to adjourn, then.

■ M O T I O N

■ MR. MCKAY: So moved.

■ CHAIR MERCADO: All in favor? We're
■ adjourned.

■ (Whereupon, at 5:20 p.m., the meeting was
■ concluded.)

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