



California Courts Self-Help Centers

REPORT TO THE CALIFORNIA
LEGISLATURE

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ADMINISTRATIVE OFFICE
OF THE COURTS

CENTER FOR FAMILIES, CHILDREN
& THE COURTS

This report has been prepared and submitted to the California Legislature under the provisions of the Budget Act of 2005–2006.

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Executive Summary

Courts throughout the nation have experienced a dramatic increase in the number of self-represented litigants attempting to access the legal system. In California alone, more than 4.3 million court users were self-represented in 2004. Self-represented litigants are a permanent and growing portion of the court system's user base and, as such, they present a challenge to the courts, which have traditionally been structured to resolve disputes in which parties are represented by attorneys who understand and are familiar with the law and procedural rules.

Over the past decade, California has taken a leading role in the national trend to develop self-help programs aimed at increasing meaningful access to justice. The Judicial Council's efforts and vision were formally established and defined in February 2004 through the adoption of its *Statewide Action Plan for Serving Self-Represented Litigants*,¹ a comprehensive action plan aimed at addressing the legal needs of the growing numbers of self-represented Californians, while improving court efficiency and effectiveness.

The action plan places at its core court-based, staffed self-help centers, recognizing that these centers, supervised by an attorney, are the optimum way to increase meaningful access to the courts by self-represented litigants throughout the state. Self-help centers provide court users information about the applicable laws and court processes, procedures, and operations. They have significantly enhanced access and fairness.

The plan also recognizes that partnerships among the courts, legal services programs, pro bono programs, local bar associations, public law libraries, law schools, social services agencies, and other agencies are critical to providing the comprehensive range of services required. The plan recommends that court-based self-help centers serve as focal points for collaboration between these entities.

Funding Background

The Budget Act for fiscal year 2005–2006 called on the Judicial Council to allocate up to \$5 million for self-help assistance and required that the Judicial Council report to the Legislature by July 1, 2007, on the implementation of the self-help funds program as

The distraught parents of an 11-year-old boy went to the self-help center with their child. The child's arm was purple and swollen and appeared to be broken. The parents had wrapped the arm in cardboard as a makeshift cast. The father had filed a petition to establish paternity but had taken no further steps in the case. The parents were unable to obtain medical assistance for their child because the father's medical insurance required proof of paternity in order to cover the child under the policy. The staff in the self-help center helped the parents prepare the paperwork to request an emergency order from the judge making a finding of paternity so the insurance would cover the medical treatment. The judge granted the order, and the family rushed off to the hospital. The following week, the family returned to the self-help center to express their appreciation and to show the staff that the son's arm had been properly treated.

¹ Judicial Council of Cal., Task Force on Self-Represented Litigants, *Statewide Action Plan for Serving Self-Represented Litigants* (February 2004), available at www.courtinfo.ca.gov/reference/documents/selfreplitsrept.pdf.

consistent with the council’s *Statewide Action Plan for Serving Self-Represented Litigants*.²

As the first step, the Judicial Council allocated over \$2.5 million of FY 2005–2006 funds for self-help programs. The next year, in 2006–2007, the Judicial Council allocated \$8.7 million from the judicial branch budget for ongoing funding for courts to start or expand self-help centers and made expanding self-help centers one of the top three priorities for funding in the judicial branch.

Currently, these funds are allowing courts to expand their services in family law and to begin to address other critical legal needs in civil courts, such as landlord-tenant disputes, debt collection, conservatorships, restraining orders, guardianships, and simple probate issues, among others. Court programs are working with legal service providers and local bar associations to more effectively and efficiently address the legal needs of the community and designing systems whereby litigants are provided the most appropriate level of service given their particular circumstances and the legal issues involved.

“I feel that this resource has literally given me a new lease on life. I felt so uneducated and stressed out prior to [the self-help center]. I am leaving empowered in my knowledge. I am so pleased and appreciative for all that I have received. Thank you for helping me see that the legal system works.”

While this amount provides a minimum baseline so that every county, including traditionally underfunded and underserved rural counties, can provide a minimum of services, courts have identified a need for \$44 million to adequately staff self-help centers with a combination of attorney and nonattorney staff. Courts also have identified a one-time need of almost \$4 million, primarily for facilities and equipment. The Judicial Council will continue to work with the Legislature and Governor’s office to find additional funding to meet this critical need.

Allocation of the Initial \$2.5 Million (FY 2005-2006)

The initial funding of \$2.5 million that was given to the courts in fiscal year 2005-2006 was distributed as follows:

- \$1.25 million was allocated on a formula basis to 51 superior courts³ to establish or enhance self-help assistance. Courts were required to match 10 percent of the grant with existing resources and were informed that increased funding for fiscal year 2006–2007 was anticipated.

² Stats 2005, ch. 38, page 32, provision 7 of item 0250-101-0932.

³ Fifty-one out of the 58 superior courts applied for funding. All of the courts that did not apply were small (5 with two judges, 1 with six judges, and 1 with seven judges). Thus, their allocation for funding was low, and they reported that it would be difficult for them to expand their services given the funding available. When additional funding became available for self-help programs in 2006–2007, each of those courts applied for that funding.

- \$342,755 was allocated for self-help centers through Regional Opportunity Grants, with funds available for a variety of special needs such as evaluation costs, translation, and staffing costs for self-help centers.
- \$335,000 was allocated to support planning and implementation of action plans and for regional coordination of self-help programs.
- \$250,000 was allocated for one-time costs associated with providing self-help services, including equipment, publications, videos, software, furniture for self-help centers, and signage.
- \$215,000 was allocated to two pilot programs, in Solano and Santa Clara Counties, to assist self-represented litigants to obtain orders after hearings in domestic violence cases.
- \$125,000 was allocated for the JusticeCorps program, which provides trained college students to volunteer at self-help centers in Los Angeles County and the San Francisco Bay Area.
- \$104,519 was allocated to expand EZLegalFile to allow litigants to complete divorce documents and to support smaller courts in providing this service.

To complement and support the efficient use of funds, the Judicial Council organized a Statewide Conference on Self-Represented Litigants, bringing together self-help center staff, judges, court administrators, legal services attorneys, law librarians, and other community partners to share resources and best practices and to develop a plan for effectively expanding self-help services given these new funds. Other projects included the simplification of translations and forms, the development of software programs to help self-represented litigants, and the completion of a benchguide for judicial officers on handling cases involving self-represented litigants.

Impact of the Initial \$2.5 Million (FY 2005-2006)

As part of the application process in April 2006, courts were asked to participate in a baseline survey that asked them about their ability to provide assistance to self-represented litigants. Courts subsequently submitted a six-month report on the use of the funds. Upon notification of availability of additional 2006–2007 funds, the courts were asked to submit plans for how they intended to use the additional \$8.7 million in ongoing funds.

The improvements at the six-month period were substantial.

- At the time of the baseline survey, 37 courts responded that they had court-based self-help centers open to the public. The small and rural courts were most in need of self-help centers. Six months later, 11 more courts had opened court-based self-help centers. Most of these were in the small to midsize or rural courts that had been underserved in the past, in northern and central California.
- All of the newly opened self-help centers were staffed by attorneys. Forty five courts report that their self-help center is staffed by an attorney.
- Fourteen courts are using these funds to offer family law services beyond Title IV-D child support services for the first time. Forty-five courts report providing

some type of assistance in family law, primarily by extension of the program of the family law facilitator, who is required to be an experienced family law attorney.⁴

- Eight courts began providing, for the first time, guardianship services to self-represented litigants, bringing the total in the state to 31. And another 8 courts have been able to add assistance with conservatorships, bringing the total to 16.
- Seven new courts began providing civil domestic violence services for the first time. These seven new courts increase the total number of courts providing civil domestic violence services to 35. Thirteen new courts have similarly been able to add civil harassment services to their self-help centers.
- Twenty-six courts report providing services in landlord-tenant cases. Eight of them began offering these services for the first time.

Courts report using a variety of service delivery methods in their self-help centers. A large percentage of them (33 courts) provide bilingual staff to assist litigants, primarily in Spanish but including other languages, such as American Sign Language, Arabic, Cantonese, Farsi, French, German, Gujarati, Italian, Japanese, Korean, Laotian, Mandarin, Portuguese, Russian, Tagalog and Vietnamese,

“Es el lugar perfecto para recibir ayuda. Gracias.”
 (“It’s the perfect place to get help. Thank you.”)

Of the 42 courts that provided information on the number of users assisted by their self-help centers, 22 showed an increase over what had been reported on their baseline reports. Overall, these 42 courts would be expected to serve over 350,000 people per year. In fact, 10 of the self-help centers serve over 1,000 persons per month. An additional 5 courts reported serving between 500 and 1,000 persons per month.

Impact of the \$8.7 Million (FY 2005-2006)

The growth that courts expect from the new funding of \$8.7 million, which provides a baseline of \$34,000 for each court with the remainder to be distributed according to population, is similarly impressive:

- All 58 courts now report plans to offer self-help services to self-represented litigants with at least one attorney at each court.
- All 58 courts plan to provide services to self-represented litigants in family law—beyond the child support services funded by title IV-D.
- Approximately 80 percent of the courts will offer services in guardianship and domestic violence cases.
- Approximately 66 percent of the courts plan to offer services in landlord-tenant, civil harassment, and adoption cases.
- Fifty-five percent of the court self-help centers plan to offer assistance in conservatorship cases and in pro per courtrooms.

⁴ See Fam. Code, § 10002, and Cal. Rules of Court, rule 5.35, for minimum standards for the office of the family law facilitator.

- Over 40 percent of the courts plan to offer help with general civil matters and to also offer settlement assistance to their customers.
- One third of the courts will provide assistance with consumer matters beyond small claims.
- Approximately 33 percent of the courts plan to offer assistance with traffic matters.

Substantial strides have been made toward the goal set out in the *Statewide Action Plan for Serving Self-Represented Litigants* that each court have an attorney-supervised, court-based, self-help center that provides a full range of services to self-represented litigants. In order to maintain this increasingly critical service, ongoing funding is vital.

Court-Community Partnerships and Collaborations

Collaborations among courts and legal services agencies, local bar associations, and pro bono programs are essential to ensuring a full continuum of services where litigants receive the legal services that they need. “Self-help centers are a key component of the continuum of legal services . . . partnering and collaborating with other service providers in their community to ensure that individuals in need are directed to the service that can best provide the assistance they require.”⁵ The success of the partnerships funded by the Equal Access Fund has been a very important achievement that laid the foundation for new ways of working toward improving access to the legal system by low- and moderate-income populations.⁶

With the 2005–2006 funding for self-help programs and the development of self-represented litigant action plans throughout the state, the majority of California

“It [the self-help center] helped me avoid filing unnecessary paperwork. She [the center attorney] was very helpful. In my short visit she helped me take a load off my mind. Thank you.”

courts have engaged in a process of partnering and collaborating with other government agencies, community legal services providers, and local bar associations to address the growing legal needs of their communities. Successful partnerships abound throughout the state, demonstrating the leadership and commitment of the judiciary, Legislature, and legal service providers toward continuing to address the justice gap in our state.

The types and extent of the collaborative efforts vary greatly from court to court, often directly related to the existence and reach of local services such as bar associations, pro bono programs, and legal services agencies. Large urban areas engage in the most extensive partnerships, primarily because of their larger number of resources and a more established network of legal services providers.

Smaller courts, however, have also seen an important shift toward greater collaboration, in spite of their particular challenges given the fewer number of legal services providers

⁵ The California Commission on Access to Justice, *Action Plan for Justice* (April 2007), p. 65.

⁶Ten percent of the more than \$15 million provided by the Equal Access Funds to legal services agencies is allocated to provide self-help services in local courts.

and, with rural courts in particular, geographical isolation and higher levels of poverty. These self-help funds have allowed many of the smaller courts to develop self-help services previously unavailable, thus providing the infrastructure to begin to reach out to community partners. Many smaller courts report being in the first phase of community engagement, and most have identified all stakeholders and crafted strategies for involving them in the collaborative process. In rural, isolated, or smaller counties, the opportunities for courts for collaboration are much more challenging, particularly in the many counties that have few or no other legal services providers.

Many courts have found innovative ways to maximize resources and collaborate with existing providers. Here are some examples of the variety of partnership efforts that California courts have embarked on with these self-help funds:

- **Superior Court of Alameda County** self-help staff work closely with the Volunteer Legal Services Corporation of the Alameda County Bar Association and community legal services programs to provide assistance at several clinics held at the self-help centers in the county, including providing assistance with guardianship, family law, unlawful detainer, expungement, and consumer debt.
- **Superior Courts of Butte, Tehama, and Glenn Counties** expanded their Self-Help Assistance Regional Project (SHARP), and the program exchanges information with Legal Services of Northern California (LSNC) and coordinates workshops to offer as many legal assistance opportunities in the community as possible.
- **Superior Courts of Calaveras, Placer, and El Dorado Counties** coordinated the use of their planning grant funds to contract with Legal Services of Northern California, the primary provider of legal services for rural and small counties in Northern California, allowing LSNC to hire an additional attorney to provide self-help services at the different court locations. By partnering, Calaveras County, which has no local bar association, no lawyer referral service, and no pro bono programs and not enough resources of its own to staff a self-help center, has been able to provide self-help services to its residents.
- **Superior Court of Fresno County** instituted a mobile access program and a new countywide telephone hotline to increase access to the court for Fresno County residents, while closely working with its community legal services programs, the local bar association, and other government agencies such as the Public Defender's Office and the Department of Child Support Services.
- **Superior Court of Imperial County** formed ongoing collaborations with California Rural Legal Assistance, the local bar association, the Center for Family Solutions, and Elder Law and Advocacy to provide services in a highly rural community with a significant low-income population and a very high number of Latino residents. It also developed an innovative internship program for Mexican law school students who provide assistance at the court's self-help center.
- **Superior Court of Lassen County**, facing limited resources due to its remote location and size, as well as the lack of a county bar association or pro bono programs, contracted with Legal Services of Northern California in Redding to provide self-represented litigants with legal assistance in the areas of small

claims, landlord-tenant, civil harassment, guardianships, and civil complaints and answers.

- **Superior Court of Los Angeles County** built on the strong base of community legal services agencies providing assistance at courthouses throughout the county to host the first Conference of Community Partners in November 2006, to initiate in-depth discussions about standards for self-help and related issues among the leadership of all the community agencies that provide services in the courthouses, court self-help attorneys and administrators, and bench officers serving on community services committees.
- **Superior Court of Riverside County** has created collaborations with the local bar association and its pro bono program, the Public Service Law Corporation, to provide assistance at the courthouse and coordinate referrals and has partnered with Inland County Legal Services to offer assistance with family law, landlord-tenant, and civil cases in several of the nine court locations.
- **Superior Court of San Diego County** has contracted with several community legal services providers, such as Legal Aid Society of San Diego County, the San Diego Volunteer Lawyer Program, and the Center for Community Solutions, among others.
- **Superior Court of San Francisco County** partners with several community agencies in order to meet its mandate to provide multilingual self-help services to the diverse population of the city and county, including the Volunteer Legal Services Program of the Bar Association of San Francisco, the Eviction Defense Collaborative, and two community social service providers, La Raza Community Resource Center and Donaldina Cameron House, which primarily serve the Latino and Chinese communities respectively.
- **Superior Court of Santa Clara County** has taken its partnerships on the road with a CourtMobile that travels to remote parts of the county to deliver legal services. The court's self-help CourtMobile targets agencies that will assist them by providing interpreters in order to enable the CourtMobile to assist non- or limited-English-speaking customers. Active collaborations with the Pro Bono Project have resulted in evening small claims assistance and a project to provide attorneys for both petitioner and respondent for domestic violence restraining order hearings.
- **Superior Courts of Sierra and Nevada Counties**, both rural courts, collaborate with as many service providers as possible to begin to serve families and children in need. The courts' self-help staff have been very active in reviving the Lawyer Referral Service (LRS), a program of Nevada County Legal Assistance, resulting in the LRS once again becoming certified by the State Bar and officially reopening.
- **Superior Court of Sonoma County** has approached the collaborative process from different angles to address access for self-represented litigants throughout the county, partnering with the Superior Court of Napa County to improve services to their self-represented litigant populations and establishing a countywide committee on self-represented litigants with its community partners to promote communication and collaboration among service providers and the

court and to establish a continuum of services for self-represented litigants in both family and civil arenas.

The Judicial Council will continue to encourage courts to collaborate with legal services providers to expand resources for self-represented litigants. The Judicial Council will also continue to work to expand funds for full representation through the Equal Access Fund and other models for appropriate cases.

Conclusion

The Judicial Council has, with the critical support of the Legislature, significantly expanded the resources and services available to self-represented litigants throughout the state. All 58 counties in the state now have a basic level of attorney-supervised self-help services, while courts work closely with legal services partners and local resources to develop a true continuum of services for their residents to have meaningful access to the court system. This initial funding provided by the Legislature and the Judicial Council has allowed courts to take major steps toward addressing critical needs.

Introduction

This report is in response to the following requirement in the Budget Act for fiscal year 2005–2006, which provides that:

The Judicial Council shall report to the Legislature by July 1, 2007, on the implementation of this program, consistent with its Statewide Action Plan for Self-Represented Litigants, including the extent to which each program funded supports a court-based service, supervised by an attorney, that is coordinated with other legal service providers in the community, including but not limited to qualified legal service providers, pro bono legal service projects, and local bar association services, allowing assessment of the legal needs and provision of referral services, as appropriate.⁷

As part of the budget for fiscal year 2005–2006, the Judicial Council was directed to allocate up to \$5 million for self-help services.⁸ After a careful review of the judiciary’s budget, the council allocated more than \$2.5 million of FY 2005–2006 funds as follows:

- Funds of \$1.25 million were allocated on a formula basis to all requesting courts (51 courts)⁹ to establish or enhance self-help assistance. The formula was based on an average of the court’s population and the amount of funds used for the Family Law Facilitator Program.¹⁰ These funds could not be used to supplant funding for existing services. They could be used only to expand existing services or start new ones. At least 75 percent of the funds were to be expended for the costs of an attorney. Courts were asked to match 10 percent of the grant with existing resources. This could include allocating an existing court clerk to assist the attorney. Courts were informed that increased funding for FY 2006–2007 was anticipated.

A chart of the allocation of the \$1.25 million in formula funds is attached as Appendix A.

⁷ Stats. 2005, ch.38, page 32, provision 7 of item 0250-101-0932.

⁸Of the funds appropriated in Schedule (1), which will be transferred to the Trial Court Improvement Fund in accordance with the Government Code § 77209(b), up to \$5 million shall be available for support of services for self-represented litigants. (page 32, provision 7 of item 0250-101-0932.)

⁹ 51 out of the 58 courts applied for funding. The courts that did not apply were all from small counties (5 with 2 judges, 1 with 6 judges, and 1 with 7 judges). Thus, their allocations for funding were low, and they reported that it would be difficult for them to expand their services given the funding available. When additional funding became available for self-help programs in 2006–2007, all of those courts applied for that funding.

¹⁰ The family law facilitator program has been in existence for 10 years. The level of spending for the program is closely monitored, and allocations adjusted according to local court expenditures over time. Using the current family law facilitator grant amount for this formula was intended to be the most accurate determination of the need for services for self-represented litigants in any given court.

- Funds of \$335,000 were allocated to requesting courts to support planning and implementation of action plans that the courts had already adopted, as well as regional coordination of self-help programs. These projects included:
 - A four-county collaborative effort to bring the JusticeCorps program to the San Francisco Bay Area;
 - Expansion of Family Law Facilitator services based on the court's action plan;
 - Provision of funding for legal services agencies to provide self-help assistance;
 - Collaboration between counties in providing legal workshops in areas distant from existing courthouses;
 - Community forums on expanding self-help assistance;
 - Development of a resource manual for self-represented litigants;
 - Development of self-help materials in a variety of languages;
 - Hiring of temporary help to review cases and establish baseline to chart effect of expanded self-help assistance;
 - Contracting with attorneys to provide workshops throughout the county;
 - Meeting with other counties to develop a regional self-help plan;
 - Development of triage and referral procedures and protocols; and
 - Organizing and funding planning meetings with courts and legal services agencies.

A list of the planning and implementation grants that were allocated is attached as Appendix B.

- Funds of \$250,000 were allocated to provide for one-time costs associated with providing self-help assistance. These costs included:
 - Videoconferencing equipment for communication between self-help centers;
 - Costs of publications, videos, and computer programs;
 - Equipment, furniture, and furnishings for self-help centers;
 - Signage; and
 - Duplication of materials.

A list of the one-time grants that were allocated is attached as Appendix C.

- Funds of \$342,755 were allocated for self-help centers through Regional Opportunity Grants. These funds were available for a variety of special needs of the courts, and they paid for:
 - Equipment, furniture, and furnishings for self-help centers;
 - Costs for evaluation;
 - Translation of materials; and
 - Staffing for workshops.

A list of the Regional Opportunity Grants that were allocated for self-help activities is found in Appendix D.

- Funds of \$125,000 were allocated for the JusticeCorps program, which provides 140 trained college students who commit to 300 hours of volunteer time to self-help centers in Los Angeles and the San Francisco Bay Area. A description of JusticeCorps is found in Appendix E.
- Funds of \$215,000 were allocated to pilot programs to help self-represented litigants obtain orders after hearing in domestic violence cases. These pilot counties were located in Solano and Santa Clara Counties.
- Funds of \$104,519 were allocated to expand EZLegalFile to allow litigants to complete most of the documents necessary for a dissolution as well as to help smaller courts provide this service. This program, developed by the Superior Court of San Mateo County, assists litigants with family law, guardianship, domestic violence, small claims, and landlord-tenant forms. It is being used by more than 38 courts throughout California. Additional information on EZLegalFile can be found at www.ezlegalfile.com/go.jsp?act=actShowHome.

In order to ensure that funds were used as wisely as possible and that courts did not have to reinvent the wheel, the Judicial Council also funded a Statewide Conference on Self-Represented Litigants, which brought self-help center staff, judges, court administrators, legal services attorneys, law librarians, and other community partners together to learn about best practices, share resources, and develop a plan for effectively expanding self-help services given these new funds. The conference offered more than 40 workshops, including a variety of topics on California law. Materials were collected from throughout the state and posted on a Web site dedicated to self-help providers (www.courtinfo.ca.gov/programs/equalaccess).

The Judicial Council also funded projects to provide for simplification of forms and translations. Its Task Force on Self-Represented Litigants completed a benchguide for judicial officers on handling cases involving self-represented litigants. The council also allocated funding to develop software programs that allow self-represented litigants to complete necessary legal forms online or with assistance at a self-help center. By making the process of form completion more efficient and obviating the need for repetitive entry of routine basic information, these programs free self-help center staff to focus on more substantive legal and procedural issues and thus provide more meaningful assistance to self-represented litigants.

In the 2006-2007 budget year, the Judicial Council authorized \$8.7 million in on-going funds for self-help assistance. This report describes the plans submitted by the courts on how those funds will be used.

A chart of the allocation of the \$8.7 million in formula funds is attached as Appendix F.

It also reports on the study of the courts that was conducted to determine the amount needed to provide comprehensive self-help services.

The results of the survey are found at Appendix G.

Background

Over the last two decades, courts nationally have experienced a dramatic increase in the number of self-represented litigants attempting to access the legal system. In California alone, more than 4.3 million court users were self-represented in 2004. A number of factors, especially the rising cost of legal services relative to inflation and the decrease in funding for legal services for low-income people, are at the root of the increase.

Regardless of the underlying causes, self-represented litigants are a permanent and growing portion of the court system's user base and as such, they present a challenge to the courts, which have been structured to resolve disputes in which parties are represented by licensed attorneys who understand and are familiar with the law and procedural rules. The influx of large numbers of litigants who are generally not informed about applicable law and court procedures poses significant implications for the administration of justice. It places demands on court staff and resources and creates ethical dilemmas about how to compensate for self-represented litigants' lack of knowledge without favoring either side, while guaranteeing to every individual meaningful access to the legal justice system.

California's courts have taken a multifaceted approach to the challenges presented by self-represented litigants. The Judicial Council's efforts to improve access to the courts have focused on:

- Designing and expanding self-help centers;
- Simplifying court forms and procedures;
- Developing technological tools to assist litigants;
- Education of court staff and judicial officers; and
- Partnerships with other legal services providers.

Reflecting its commitment to improving access to justice and quality of court services, the Judicial Council adopted its *Statewide Action Plan for Serving Self-Represented Litigants*¹¹ in February 2004, a comprehensive action plan aimed addressing the legal needs of the growing numbers of self-represented Californians while improving court efficiency and effectiveness.

The key recommendation of the plan is that each court have a court-based, attorney-supervised, staffed self-help center that would initially assess a litigant's needs and

¹¹ *Statewide Action Plan for Serving Self-Represented Litigants*, by the Judicial Council's Task Force on Self-Represented Litigants, February 2004, available at www.courtinfo.ca.gov/reference/documents/selfreplitsrept.pdf.

provide ongoing assistance throughout the entire court process, including collection and enforcement of judgments and orders. The plan envisions these centers as the focal points for countywide or regional programs for assisting self-represented litigants in collaboration with qualified legal services, local bar associations, law libraries, and other community stakeholders.

This concept of a comprehensive assistance program for self-represented litigants has developed as a national trend over the last decade, and California has taken a leading role in developing self-help programs not only to improve access to justice and service to the public but also the effective functioning of the court itself.

The Evolution of Self-Help Centers

With the recognition by the Judicial Council and the Legislature that the challenges presented by the rising numbers of self-represented litigants had to be addressed, legislation was passed in 1996 to introduce a family law facilitator in all 58 counties in California to begin on July 1, 1997.¹² The Family Law Facilitator Program, administered by the Judicial Council and funded by federal and state funds, has been enormously successful and has created the backbone for self-help services in the California courts. Family law facilitators are licensed attorneys working for the court to provide legal information, education, and guidance to self-represented litigants in the areas of child support, parental relationships, and health insurance. The Judicial Council receives funding from the State Department of Child Support Services that is limited to those matters funded through federal Title IV-D funds. This covers all governmental child support cases and other child support matters if provided in a group setting. As discussed further below, most superior courts have expanded the duties and services offered by facilitators, providing funding for facilitator services to include other family law issues such as custody and visitation, domestic violence, and divorce.

A comprehensive evaluation process of the Family Law Facilitator Program has demonstrated that the program not only has received extremely high customer satisfaction ratings—it assists more than 450,000 litigants each year—but also has led to reduced conflict between parties in child support matters, greater court efficiency in processing these disputes, and ultimately increased families' access to the child support process. These successes have earned the Family Law Facilitator Program praise from judges and other participants in the legal system, as well as encouraged support from local bar associations for the program and other self-help efforts.¹³

Shortly after enacting the Family Law Facilitator Act, the California Legislature established a Family Law Information Center pilot project, outlined in Family Code section 15000, to help “low-income litigants better understand their obligations, rights, and remedies and to provide procedural information to enable them to better understand and maneuver through the family court system.”¹⁴ Three pilot project centers, in Los

¹² Family Code, § 10002.

¹³ *California's Child Support Commissioner System: An Evaluation of the First Two Years of the Program*, Administrative Office of the Courts, May 2000, available at www.courtinfo.ca.gov/programs/cfcc/pdf/files/cscr2000.pdf.

¹⁴ Family Code, § 15000.

Angeles, Fresno, and Sutter Counties, were established and supervised by attorneys to carry out the mandate under the Family Code. An evaluation for this project was completed in March 2003, concluding that the three centers had provided services to more than 45,000 litigants every year and had been an overwhelming success in terms of customer satisfaction and improving the way in which the courts were able to manage cases involving self-represented litigants.¹⁵

In 2001, the Legislature continued its commitment to access to the courts by providing funding for five pilot self-help centers. Each pilot center chosen was to design its services to explore a particular approach to meet the challenges posed by self-represented litigants and then to serve as models for replication statewide. The five approaches were:

- Provide services through the use of technology (Contra Costa County);
- Provide services to Spanish-speaking litigants (Fresno County);
- Provide services to a multilingual population (San Francisco County);
- Collaborate with other counties to maximize services in rural areas (Butte, Glenn, and Tehama Counties); and
- Collaborate in an urban setting with other community providers (Los Angeles County).

The evaluation for these projects was submitted to the Legislature in March 2005.¹⁶ Once again, the evaluation revealed that self-help centers improve access to the courts for self-represented litigants while helping the courts operate more efficiently and effectively both in the administration of justice and in meeting a significant need for legal services in their communities. All of the projects have produced tangible results, such as translated documents, technological solutions to service delivery, and strategies for collaborations and partnerships, that have been and continue to be replicated across the state and even outside California. Since their inception, three of the five projects have received Ralph N. Kleps Awards for Improvement in the Administration of the Courts.

Partnerships

While court leadership in providing self-help services is crucial, the support and collaboration of all stakeholders in the justice system (legal aid programs, bar associations, public libraries, law schools, social service agencies, nonprofit groups, and others) is vital to the success of efforts to improve access to justice. The most successful programs are those where courts have collaborated with a number of bar groups and community organizations to address the legal needs of their communities.

California has seen the success of these collaborations through the partnerships funded by the Equal Access Fund (EAF), created by the Legislature and administered by the Judicial Council. Ten percent of the more than \$15 million provided by the EAF to legal services agencies that are eligible to receive funds from IOLTA (Interest on

¹⁵ *Family Law Information Centers: An Evaluation of Three Pilot Programs*, Administrative Office of the Courts, March 2003, available at www.courtinfo.ca.gov/programs/cfcc/resources/publications/FLICrpt.htm.

¹⁶ *Model Self-Help Pilot Programs—A Report to the Legislature*, Administrative Office of the Courts, March 2005, available at www.courtinfo.ca.gov/programs/equalaccess/modelsh.htm.

Lawyers Trust Accounts) must go to partnership grants.¹⁷ Through these partnerships, legal services programs work with their local courts to provide self-help services at the court, allowing legal aid programs and courts to work together to address the legal needs of their community. The partnership projects have been very successful, as reported in the March 2005 evaluation and report to the Legislature.¹⁸

Self-Help Centers as a Core Component of Court Services

The Family Law Facilitator Program has laid the foundation for expanding self-help services throughout California's superior courts. Together with the best practices compiled from subsequent self-help center projects, it has shown how to meet the challenge of increasing numbers of self-represented litigants. These experiences led the Judicial Council to place self-help centers at the core of its *Statewide Action Plan for Serving Self-Represented Litigants*. The plan recognizes that court-based, staffed self-help centers, supervised by an attorney, are the optimum way to increase meaningful access to the courts for self-represented litigants throughout the state.

Self-help centers serve as a single point of access for court users to gain information about applicable laws, court processes, procedures, and operations. They provide enhanced access to the courts, better understanding of court processes and procedures, assistance with individual needs, and availability of written materials and videotapes to help them better prepare for court. Often, self-help center staff encourage and conduct mediations or provide other settlement assistance, which serves litigants by providing a faster, more empowering, and less expensive method for resolving certain disputes. When necessary, given the complexity of a case, the litigant's English fluency, or other factors that may make a litigant incapable of self-representation, self-help centers refer people to legal services or the local bar to ensure that individuals are directed to an appropriate legal resource that can best provide the type of legal assistance they require. Because many litigants have related personal, financial, and legal issues that need to be addressed, center staff may also link litigants to related community services, which can offer a more comprehensive approach to solving their problems.

Other components of the court system benefit significantly from the work of self-help centers. By increasing litigants' access to information about and assistance in navigating through the system, the demands on courts' office personnel are lessened. Judges see better-prepared and more-informed litigants, resulting in cases being disposed of more efficiently. Clerks are able to immediately refer litigants to the self-help center for more comprehensive assistance. Better-informed litigants have more realistic expectations both of the court process and the consequences of proceeding without a lawyer. Self-help center staff are able to work within the court to identify and address barriers for self-represented litigants. Ultimately, the justice system as a whole benefits by the improved perception of public service provided by courts and enhanced public trust and confidence in the justice system.

¹⁷ \$10 million in EAF funds come from the state budget and an additional \$5 million come from court filing fees.

¹⁸ *Equal Access Fund—A Report to the California Legislature*, Administrative Office of the Courts, March 2005 available at www.courtinfo.ca.gov/programs/equalaccess/eaf.htm.

Expanding Self-Help Centers

In 2006–2007, expanding self-help centers was one of the top three priorities for funding in the judicial branch. A budget of \$3.7 million was allocated as a statewide priority from the Trial Court Trust Fund and \$5 million was allocated from the Trial Court Improvement Fund. Thus a total of \$8.7 million from the courts' budget has been allocated for ongoing funding for courts to start or expand self-help centers. In order to ensure that rural areas, traditionally underserved and underfunded, are able to incorporate self-help programs into the court's services, the Judicial Council has provided a minimum of \$34,000 per county to cover a minimum of 12 hours per week of an attorney's time for self-help services. The remainder of the funds have been allocated to the courts based on 2006 population figures from the Department of Finance to fairly distribute the funding.

These funds are allowing programs to not only expand their family law facilitator services in family law, but to also begin to address other critical legal needs in civil courts, such as landlord-tenant disputes, debt collection, conservatorships, restraining orders, guardianships, and simple probate issues. Courts are providing services in various formats, such as individual help, workshops, courtroom assistance, mediation, community outreach, and developing and translating informational and educational materials. Court programs are working with legal service providers and local bar associations to more effectively and efficiently address the legal needs of the community and designing systems whereby litigants are provided the most appropriate level of service given their particular circumstances and legal issues involved.

While this dollar amount provides a minimum baseline so that every county can provide a minimum of services, courts have identified a need for \$44 million to adequately staff self-help centers with a combination of attorney and nonattorney staff. Courts also identified a one-time need of almost \$4 million, primarily for facilities and equipment. The Judicial Council will continue to work with the Legislature and the Governor's Office to find additional funding to meet this critical need.

Basis for Allocation Guidelines

Strong emphasis on staffing. Consistently, self-represented litigants report that the most beneficial service courts can provide is staff dedicated to answer their questions. The recent Model Self-Help Pilot Program evaluation reported that self-represented litigants ranked having staff to answer their questions and assist them with forms as the most helpful services.¹⁹ Although technology can increase the efficiency and reach of legal assistance and provide innovative methods of providing legal information, it cannot substitute for the in-person assistance of attorneys and other self-help center staff. Self-represented litigants need much more than just written information or Web sites or computer kiosks. Many are not literate or familiar with technology, and in a state as

¹⁹*Model Self-Help Pilot Programs—A Report to the Legislature*, Administrative Office of the Courts, March 2005, available at www.courtinfo.ca.gov/programs/equalaccess/modelsh.htm.

diverse as California, significant numbers have limited English skills. Even when other barriers are not present, litigants need assistance and support from staff to help them diagnose their problem and process the legal information they are provided with. It is important that the staff providing these services be very knowledgeable and well versed in court procedures, community legal and social services, and other tools available for litigants to represent themselves throughout the judicial process. In addition, they must be able to handle the high levels of stress often experienced by self-represented litigants and must have the ability to communicate complex concepts clearly and concisely to litigants of diverse backgrounds, literacy levels, and English-speaking abilities.

The *Statewide Action Plan for Serving Self-Represented Litigants* recognizes that “[w]ritten instructional materials, resource guides, computer programs and Web sites, videos, and other materials should support self-help center staff. Without available staff assistance, these resources alone should not be considered a self-help center.”²⁰ Though written materials, instructions, forms, and computers can be valuable support tools, none of these alone are the best way of providing services to self-represented litigants. Personal assistance by self-help center staff can be successfully provided through individual assistance, workshops, telephone hotlines, videoconferencing, or e-mail, among other delivery models. Litigants need to be able to ask questions when reading materials or using computer programs and have concepts explained and appropriate referrals provided.

In the survey of courts to determine their needs for funding for self-help assistance, they reported that, if fully funded, more than 80 percent of their funds would be used for staff to assist self-represented litigants. Thus, these funds were allocated with the requirement that, absent a waiver from the project manager, 75 percent of the funds should be used for attorney time. New funding includes the provision that 80 percent of the funds should be used for staff, recognizing that paralegals and other trained staff can provide excellent assistance when under the direction of an attorney.

Providing services in rural areas. Rural areas encounter critical challenges when trying to deliver legal information and services to residents. A substantial percentage of the residents of rural communities fall significantly below the poverty threshold. In addition to high rates of poverty and unemployment (the unemployment rate in rural California is 21 percent compared to the 6.6 percent statewide average), rural communities traditionally have lower educational levels, high numbers of migrant workers, and literacy and language barriers. Lack of transportation combined with the need to travel great distances to access services exacerbate the difficulty of providing services in already very underserved communities with scarce resources.

Most rural counties have limited local bar associations and legal services programs, if any, and rarely have pro bono attorney programs or law schools from which to draw

²⁰ *Statewide Action Plan for Serving Self-Represented Litigants*, Judicial Council of California (2004), p. 12, available at www.courtinfo.ca.gov/programs/cfcc/pdffiles/Full_Report_comment_chart.pdf.

volunteers. Given the lack of a strong legal services delivery system, court-based self-help centers have proven to be particularly critical in rural areas.

The availability of court-based family law facilitators to serve self-represented litigants in all 58 counties, and the expansion of court-based self-help programs are important developments in efforts to provide legal assistance to people in rural areas who otherwise would have nowhere to turn. The expanding court-based programs for self-represented litigants serve both to increase service to people who need legal information, and to create an infrastructure for expanded partnerships with legal aid, bar associations and county law libraries to provide legal advice and assistance in innovative ways.²¹

In the distribution of these funds, the formula designed for the \$1.25 million was the average of the county population and the amount awarded to the family law facilitator. This was to recognize that the costs of providing assistance in rural areas are generally higher per person because of the lack of a concentrated populace. Rural counties were also encouraged to collaborate with neighboring counties through the use of planning grants, which were higher for those courts that developed and implemented joint projects than for those that focused on one county.

As the final reports from rural programs evidence, the importance of partnerships and collaboration is heightened in rural areas, and the reports attest to the innovative collaborations between rural courts, between rural courts and legal services programs and bar associations, and between rural and urban courts and resources.

Examples of special services provided in rural areas

Fresno and Placer County telephone hotlines. In November 2006, the Superior Court of Fresno County implemented a countywide toll-free hotline that allows residents of a primarily rural county access to self-help services without having to travel long distances to reach legal assistance. The toll-free line calls the self-help center (SHC) directly, and assistance is provided in English, Spanish, and Arabic. The office assistant answers the call initially and routes it to an examiner or attorney as necessary. Through the hotline, the SHC provides general assistance with any issue the center handles, providing general information regarding procedures and legal options based on the information provided by the caller. For questions that the SHC cannot or does not handle, the hotline staff makes referrals to the various community and government agencies with which it closely collaborates. For an eight-week period in 2007, self-help center staff recorded 644 calls to the hotline. The court launched a comprehensive public outreach and education campaign on self-help services and the new hotline. A media release was distributed in January 2007, and the news release led to a feature story on the local Univision station. Funding from other sources was used to promote the hotline through a seven-week tip-of-

²¹ *Action Plan for Justice*, by the California Commission on Access to Justice, page 56, April 2007, available at www.calbar.ca.gov.

the-day radio campaign from January to March on five English and Spanish radio stations.

In January 2006, the Superior Court of Placer County instituted a 24-hour voicemail system to facilitate access to the self-help center by residents spread throughout the largely rural county. Customers can call in anytime, and their calls are automatically routed to a voicemail message. The voicemail informs callers about self-help services and the lack of attorney-client privilege and confidentiality, and tells them their call will be returned in approximately 48 hours. Calls are returned in the afternoons by a staff attorney.

The calls generally involve a mix of procedural and substantive legal issues, such as how to start a divorce or get a final judgment, or how to file a restraining order. The staff attorney will, in response, discuss both the substantive law in the particular area as well as provide procedural information and referrals to the forms and available resources. Although the Placer self-help services are primarily offered in the area of family law, the hotline attempts to assist people in other areas of law as well, providing information on unlawful detainer actions, small claims cases, criminal record expungement and a few other topics on a regular basis. Often, instructional materials, links and informational documents are emailed to the callers for further assistance. The voicemail system currently receives approximately 100 calls a week, and the service is becoming increasingly popular as customers become more aware that it is available.

San Joaquin Valley collaboration. Using the planning grant funds offered to encourage collaboration, the first San Joaquin Valley Regional Pro Per Task Force meeting, in August 2006, had 36 participants representing the Superior Courts of Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus, and Tulare Counties. They included court executive officers, judicial officers, and self-help center staff. At this meeting, the group reviewed current services by the courts and immediate and long-term plans for enhancements, and developed the mechanisms to make future communication and collaboration easier and more efficient. To that end, a listserv was implemented to facilitate informal interaction and communication between meetings.

The second meeting was held in Modesto in October 2006, where participants began to establish strategic plans for the implementation of self-help centers in courts that do not yet have one and enhancements for the courts that do. To begin this process, each court distributed self-help materials and provided an overview of current services. This led to the development of a regional reference document of self-help services. At the third meeting, in Visalia, working groups were formed to explore developing alternative dispute resolution programs in courts, staffing standards for self-help centers, a valley-wide video on self-help services, and a regional hotline similar to the one established in Fresno County. The group is now working on an electronic community resource directory for the region. It has begun to offer joint workshops on family law matters in rural areas where litigants may file cases across county lines. It also is exploring a regional hotline for self-represented litigants using one toll-free number that can be promoted cost-effectively across county lines that would either automatically connect callers to the self-

help center in the county where the call originated or offer them a choice of court self-help centers to contact.

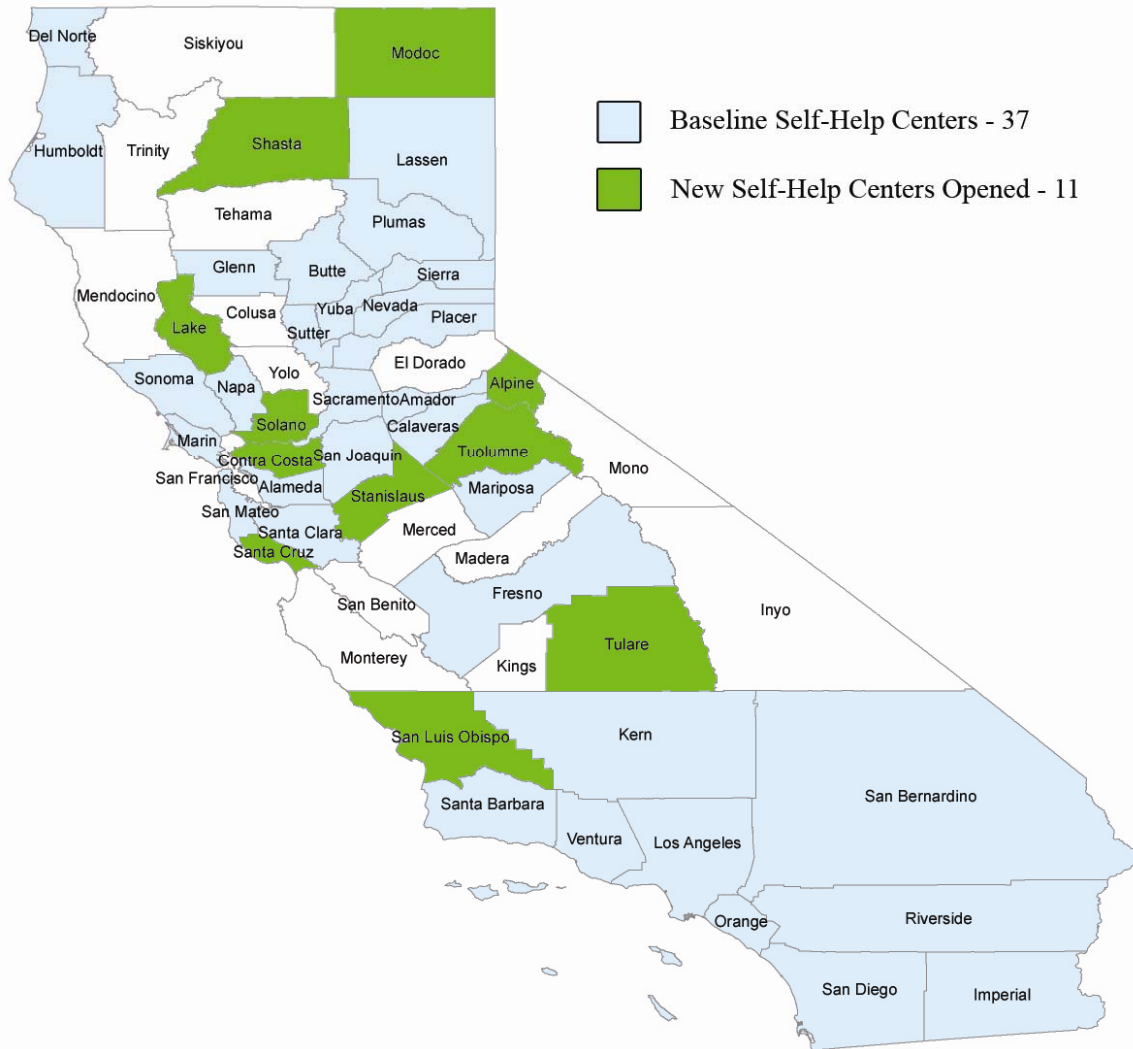
Impact of Self-Help Services Statewide

As part of the application process in April 2006, courts participated in a baseline survey that asked them about their ability to provide assistance to self-represented litigants. A copy of the survey is attached at Appendix H. In February 2007, courts who had received funding were asked to provide a report on how those funds were used in the six-month period that was covered by the grant (July 1, 2006–December 31, 2006). A copy of the questionnaire is attached at Appendix I. In December 2006, courts submitted plans for how they intended to use the \$8.7 million in ongoing funds that have been allocated by the Judicial Council for the period January 1, 2007–December 31, 2007. As the courts are currently implementing these plans, some comparisons may be drawn to reflect the increased funding.

At the time of the baseline survey, 37 courts indicated that they had court-based self-help centers open to the public. All of the large and most of the medium-size courts reported that they had self-help centers. Small and rural courts were mostly the ones who lacked self-help centers.

Six months later, the questionnaires received by the courts that had participated in the funding indicated that 11 new courts had opened court-based self-help centers to the public. Most of these were in the small to midsize or rural courts in northern and central California that had been underserved in the past. The one court with more than 20 judges that reported that it had not previously had a self-help center opened one during this time. The other 10 courts had fewer than 20 judges and 6 had fewer than 10 judges. Four of the courts that were able to open new self-help centers had fewer than 5 judges.

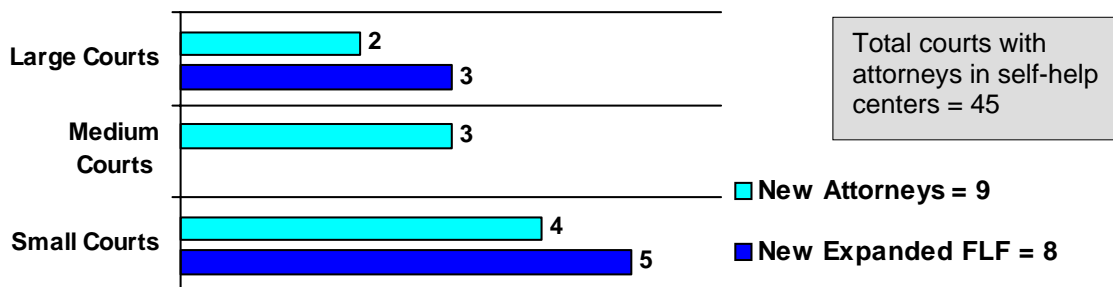
Courts With Self-Help Centers at Time of Reporting



Staffing: Attorneys

At six months, 45 of the courts that reported having self-help centers open to the public had attorneys on staff, and 1 was in the process of hiring an attorney. Nine courts had previously not had attorneys on staff in their self-help centers that could now report having them. Twenty-four courts reported more than one attorney working in their self-help centers. Only five courts reported having self-help centers open without attorneys on staff—two large courts, one medium-size court, and two small courts.

Courts Adding Attorneys for the First Time



All of the 11 courts that opened new self-help centers were able to have attorneys available to assist the public.

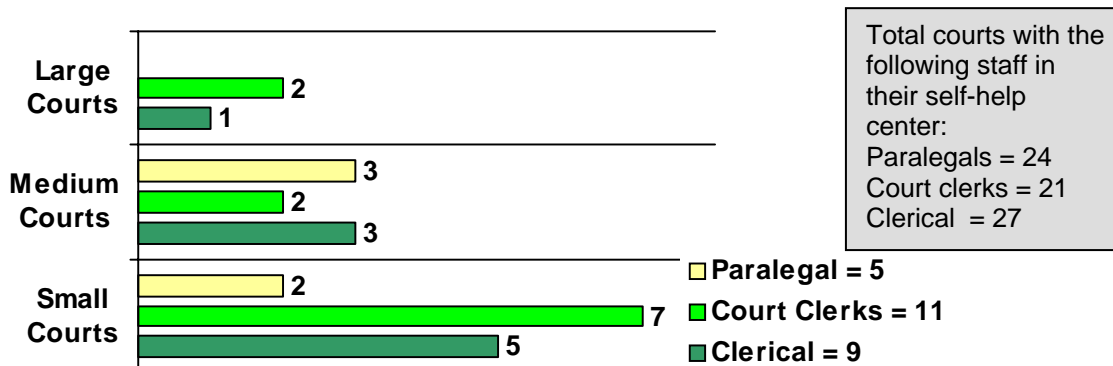
Eight courts whose family law facilitators did only Title IV-D work have now been able to expand their assistance to non-Title IV-D family law matters. This has enabled the expansion of family law services. Only four of the courts who participated in the funding reported continued restriction of the family law facilitator to only Title IV-D work.²²

Staffing: Nonattorneys

Paralegals. Twenty-four courts reported having paralegal staff in their self-help centers. All of these except one also have attorneys working with them. Five courts that had not previously reported having paralegal staffing were able to add it with this funding for the first time, three medium-size courts and two small courts. Thirteen courts reported having more than one paralegal working in their self-help center.

Court clerks. Twenty-one courts reported having court clerks working in self-help centers; of these, 11 had not previously reported having court clerks. Two are large courts, with 9 and 10 judges respectively, and seven are courts with fewer than 6 judges. In all but one of the small courts, the clerks work in the centers with attorneys. Eight courts have more than one court clerk working in their self-help center.

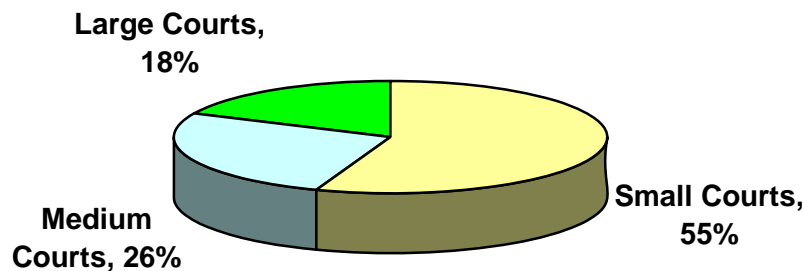
Courts Adding Nonattorney Staff for the First Time



²² Title IV-D funding from the Department of Child Support Services covers child support, spousal support, and health insurance issues only.

Clerical support. Twenty-seven courts used funding for clerical support staffing in their self-help centers. Nine courts that had not previously reported having clerical support staff were now able to provide it—5 small courts, 3 medium-sized court, and 1 large court. In all 22 courts with clerical staff, this staff works with attorneys, and in 13 courts, they work with both attorneys and paralegal staff.

Percent of total courts reporting new staff added



Case Types

The new funding has enabled courts to provide services in a variety of areas of law, many not previously available.

Family law. Forty five courts report providing some type of assistance in family law, primarily by extension of the family law facilitator, who is required to be an experienced family law attorney.²³ This has been accomplished either by previous commitments of funding to allow expansion beyond Title IV-D funding or by using the new self-help funds to be begin that expansion. Fourteen courts are offering family law services for the first time.

Dissolution. Forty-three courts now offer services in marriage dissolution (divorces). Funding allowed 13 courts to add this service for the public for the first time.

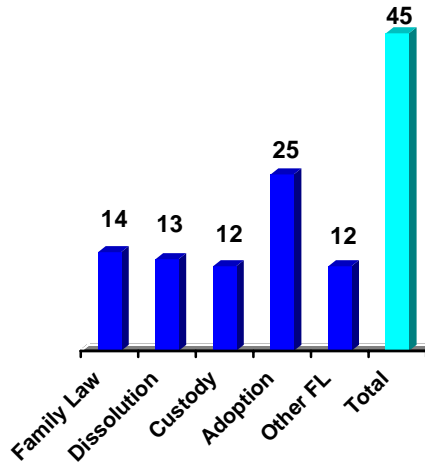
Custody/Visitation. Forty-two courts now offer assistance in matters of custody and visitation. Funding allowed 12 new courts to provide this service.

Adoption. Twenty-five courts are now providing services in adoptions. Eighteen courts were able to add this service to their self-help centers.

²³ See Family Code, section 10002, and California Rules of Court, rule 5.35, for minimum standards for the office of the family law facilitator.

Other family law. Forty of the courts used funding to provide services in unspecified other family law matters. Twelve courts report that funding helped their self-help centers expand services to issues in family law that they were previously unable to handle. All forty of these courts report offering assistance with non-Title IV-D child support and spousal support

**Courts Offering Family Law Services,
by Case Type
(New Courts in Dark Blue)**

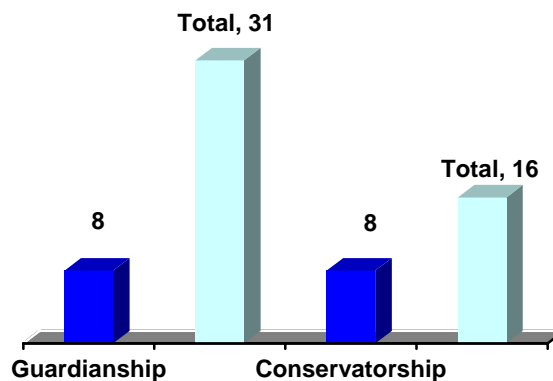


Probate

Guardianships. Thirty one courts offer services in guardianship matters. In thirteen courts, guardianship assistance is offered through the family law facilitator. This initial self-help funding allowed eight courts to provide, for the first time, guardianship services to self-represented litigants.

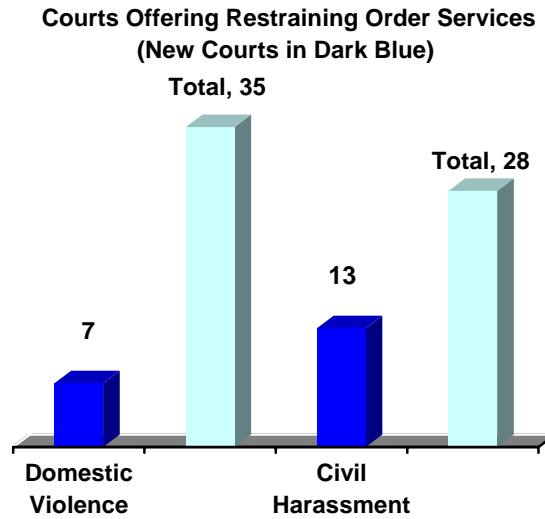
Conservatorships. Sixteen courts offer some assistance with conservatorships. The funding allowed eight courts to add this service for the first time.

**Courts Offering Probate Services
New Courts in Dark Blue**

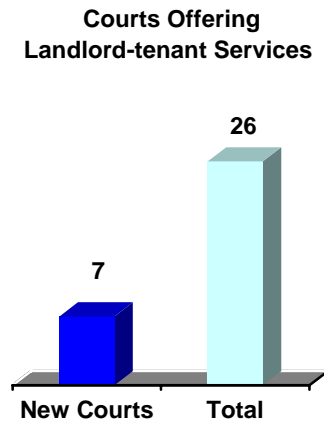


Restraining orders. Domestic violence. Thirty-five court self-help centers offer assistance in civil domestic violence cases. Seven courts have added this service to their self-help centers for the first time.

Civil harassment. Twenty eight courts report services in civil harassment cases. Thirteen of those courts have used funding to provide services that were not previously reported as available at the court self-help centers.

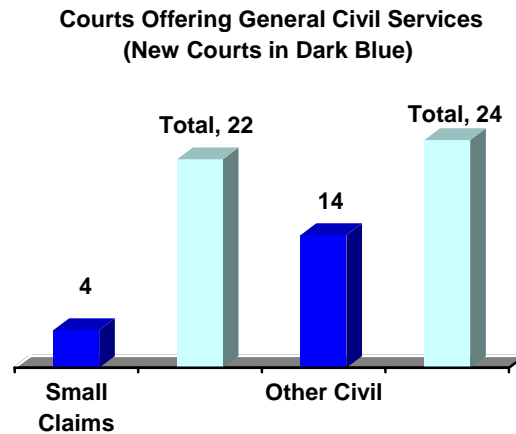


Landlord-tenant. Twenty-six courts report providing services in landlord-tenant cases. Eight of these are offering these services for the first time.

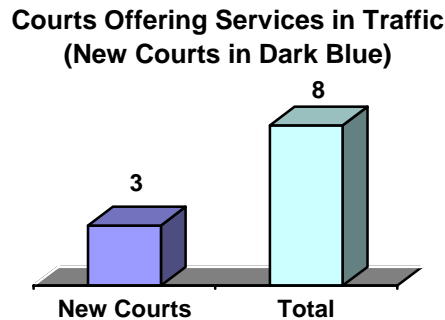


Other civil. Twenty-four courts offer services in other types of civil litigation and 14 have responded in this category for the first time. The types of issues that are covered include name changes (23 courts), consumer matters (14 courts), and, while not strictly civil, expungements (11 courts).

Small claims. Twenty-two courts report providing small claims assistance in their self-help centers. Four new courts added this service to their centers.



Traffic. Eight courts report providing assistance in traffic matters. Three courts have added this service.



Service Delivery

Courts report using a variety of service delivery methods in their self-help centers. Most courts offered a combination of individual service and workshops. In fact, the 10 self-help centers that reported serving more than 1,000 individuals per month all used a combination of workshops and individual service delivery methods. These courts have also employed a variety of other services: 6 offer telephone assistance, 7 offer courtroom assistance, and 8 offer assistance in settling cases.

Service Delivery Method	Number of Courts Providing Method
Individual drop-in	46
Appointment	32
Workshop	35
Telephone	33
Courtroom	26

Type of Service	Number of Courts Providing Service
Settlement	22
Mediation	32
Other	22

Language

Thirty-three courts reported that their self-help centers have bilingual staff available to assist litigants. Of these, 30 reported on which languages were available. Staff bilingual in Spanish and English were available in all of those courts. Six of the larger courts reported bilingual staff with skills in varying combinations of several other languages, including American Sign Language, Arabic, Cantonese, Farsi, French, German, Gujarati, Italian, Japanese, Korean, Laotian, Mandarin, Portuguese, Russian, Tagalog and Vietnamese,

Volume

Thirty-two courts responded with volume data in the baseline report. The total volume estimated by those courts was 18,277 per month. At the six-month reporting period, 42 courts provided a monthly estimated volume of 29,914. This is a monthly increase of 11,637 or a 64 percent gain in volume total. Based upon these figures, these 42 courts are expected to serve approximately 358,968 people per year.

Of the 42 courts reporting volume numbers, 22 showed an increase over what had been reported on their baseline reports. Five courts who had not provided any volume data in their baseline reports were able to provide volume figures in their legislative reports, which clearly suggests improvement.

<p>42 COURTS REPORTING</p> <p>Monthly Volume: 29,914</p> <p>Yearly Projection: 358,968</p> <p>A 64 percent increase from baseline survey</p>
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Ten of the self-help centers serve more than 1,000 persons per month. As would be expected all are in large counties except for three that are in medium-size counties. An additional five courts reported serving between 500 and 1,000 persons per month. Of these five, two are large and three are medium-size courts.

The Future: Next Steps

Shortly before the courts reported on their progress at the six-month point, \$8.7 million was allocated by the Judicial Council for implementation of court-based self-help centers statewide. The courts were asked to prepare program designs for how they planned to implement their new self-help funding.

This new funding provided a baseline of \$34,000 for each court, with the remainder to be distributed according to population. This was designed to ensure that all courts can provide at least 12 hours per week of attorney assistance in their court-based self-help centers. This funding was designated as ongoing, which was a critical element for many courts in determining to hire staff. All courts have applied for this funding.

The plans that the courts presented for these new funds have been compared to their earlier six-month status reports in order to ascertain a picture of the growth expectation they can expect from this substantial new funding.

All of the courts in California have now reported plans to offer self-help services to self-represented litigants. Further, all courts have attorneys available to assist self-represented litigants.

The second round of funding has ensured that the self-help centers will be attorney-supervised and will be able to provide a high quality of information and education to the self-represented litigants that need their assistance. The courts are also planning to support these attorneys with paralegal staff that can competently assist the public. The number of courts that plan to provide attorney-supervised small claims assistance also continues to grow.

Services	No. of courts with services (from 6-month report)	Total no. of courts to offer service w/grant (app. data)	Increase in no. of courts offering service	Percent increase in courts offering service	Percent of 58 courts with grants providing services
Small claims advisor	22	27	5	22.73%	47%
Individual help	46	58	12	26.09%	100%
Telephone	33	48	15	45.45%	83%
Workshops	35	45	10	28.57%	78%
Clinics	N/A	41	N/A	N/A	71%

Staffing	No. of courts with services (from 6-month report)	Total no. of courts to offer service w/grant (app. data)	Increase in no. of courts offering service	Percent increase in courts offering service	Percent of 58 courts with grants providing services
Self-help center attorneys	45	58	13	28.89%	100%
Family law facilitator expanded	38	49	11	29.95%	84%
Paralegals	24	33	9	37.50%	57%
Court clerks	21	22	1	4.76%	38%
Clerical	22	16	(11)	(40.74%)	28%

The self-help centers are planning to provide a wide variety of services to the public covering many different types of cases.

- All 58 of California’s courts are now planning to provide services to self-represented litigants in family law, beyond the child support services funded by Title IV-D.
- Approximately 80 percent will offer services in guardianship and domestic violence cases.
- Approximately 66 percent plan to offer services in landlord-tenant, civil harassment, and adoption cases.
- Fifty-five percent plan to offer assistance in conservatorships and to provide assistance in pro per courtrooms.
- More than 40 percent are planning to offer help with general civil matters and to also offer settlement assistance to their customers.
- Approximately 33 percent plan to offer assistance with traffic and other consumer matters.

Case Types	No. of courts with services (from 6-month report)	Total no. of courts to offer service w/grant (app. data)	Increase in no. of courts offering service	Percent increase in courts offering service	Percent of 58 courts with grants providing services
Family law	45	58	13	28.89%	100%
Guardian	31	47	16	51.61%	81%
Domestic violence	35	46	11	31.43%	79%
Small claims	22	39	17	77.27%	67%
Landlord-tenant	26	39	13	50.00%	67%
Civil harassment	28	38	10	35.71%	66%
Adoption	25	37	12	48.00%	64%
Conservatorship	16	32	16	100.00%	55%
Courtroom	26	32	6	23.08%	55%
Other	22	29	7	31.82%	50%
Settlement	22	25	3	13.64%	43%
Other civil	24	24	0	0.00%	41%
Consumer	14	21	7	50.00%	36%
Traffic	8	19	11	137.50%	33%

Court-based self-help centers also plan to continue delivering their services in a variety of ways. All 58 courts plan to offer individual assistance. The second-largest form of service is telephone assistance, followed by workshops, courtroom services, and settlement assistance

	Service type				Total no. of courts in group	Percent of total
	Individual	Telephone	Workshops	Clinics		
No. of courts offering all 4 service modes	30	30	30	30	30	52%
No. of courts offering 3 service modes	16	12	11	9	16	28%
No. of courts offering 2 services modes	12	6	4	2	12	21%
Total no. of courts offering service mode	58	48	45	41	58	100%
Percent of courts offering service type	100%	83%	78%	71%	100%	

Six-month reporting data	46	33	35
Increase in number of courts	12	15	10
Percent increase in number of courts	26%	45%	29%

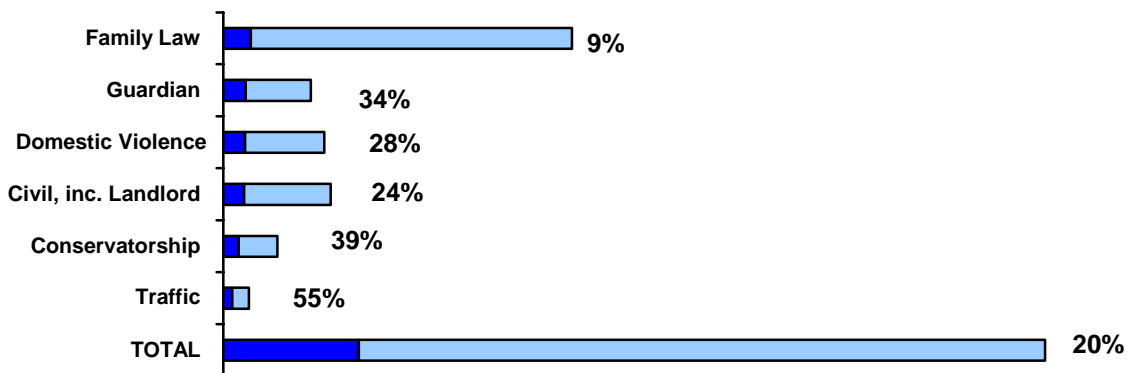
Case Needs

In June 2006, courts were asked to complete a questionnaire setting out what they thought they needed to provide comprehensive self-help assistance. This information was collected to assist the Trial Court Budget Working Group determine the level of need for self-help funding. The compiled responses to that survey are found at Appendix G. Fifty-four of the courts responded to the questionnaire. Their responses indicate that the greatest need for self-help services remains in family law. The following table sets out the distribution of requests from the courts based on their assessments of the needs of the public.

Case type	Budget request	Percent of total		
Family law	\$20,584,358	47%	59%	Combined family and DV
Domestic violence	\$5,084,973	12%		
Guardianship	\$4,190,005	10%	18%	Combined probate
Conservatorship	\$2,482,678	6%		
Simple probate	\$1,030,123	2%		
Civil (including landlord-tenant)	\$5,552,868	13%		
Small claims	\$4,026,797	9%		
Other (including traffic, expungements, etc.)	\$1,051,562	2%		
Total	\$44,003,364	100%		

Almost 60 percent of the funding requested by the courts was for family law and domestic violence services. When probate was added, that figure rose to 77 percent. It would appear that the courts have made progress in this direction with the funding that has been provided to date, but barriers remain to be addressed. To meet the goal of a full range of meaningful and accessible court self-help services and access for self-represented litigants to the court, development and expansion will be critical for the future. The chart below sets out the progress made to date by the \$8.7 million in funding currently available to the courts.

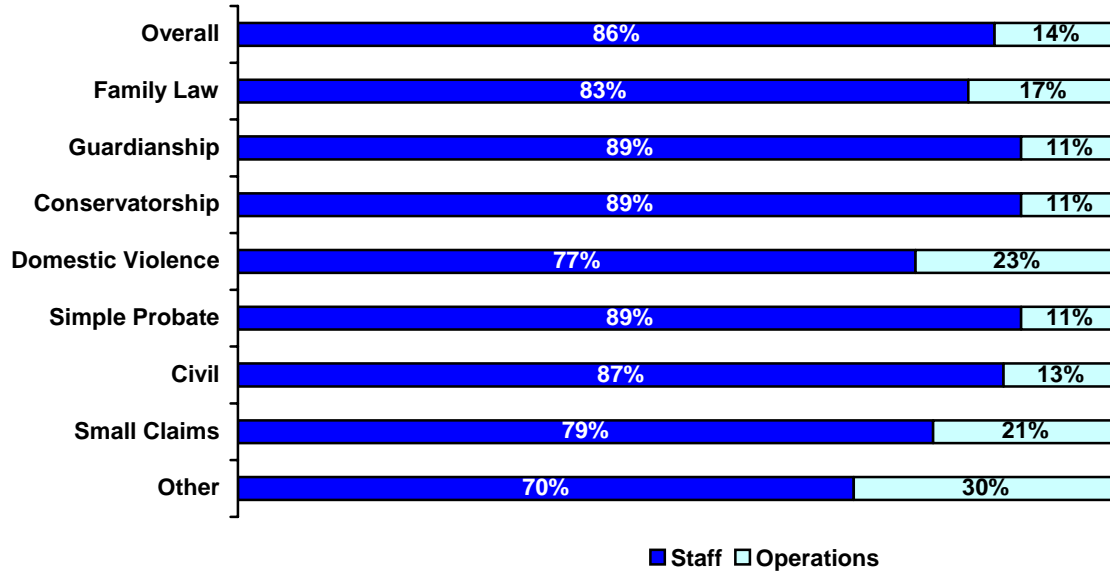
**\$8.7 Million Percent Progress Toward Goals
by Case Type and Total**



Staffing Requests

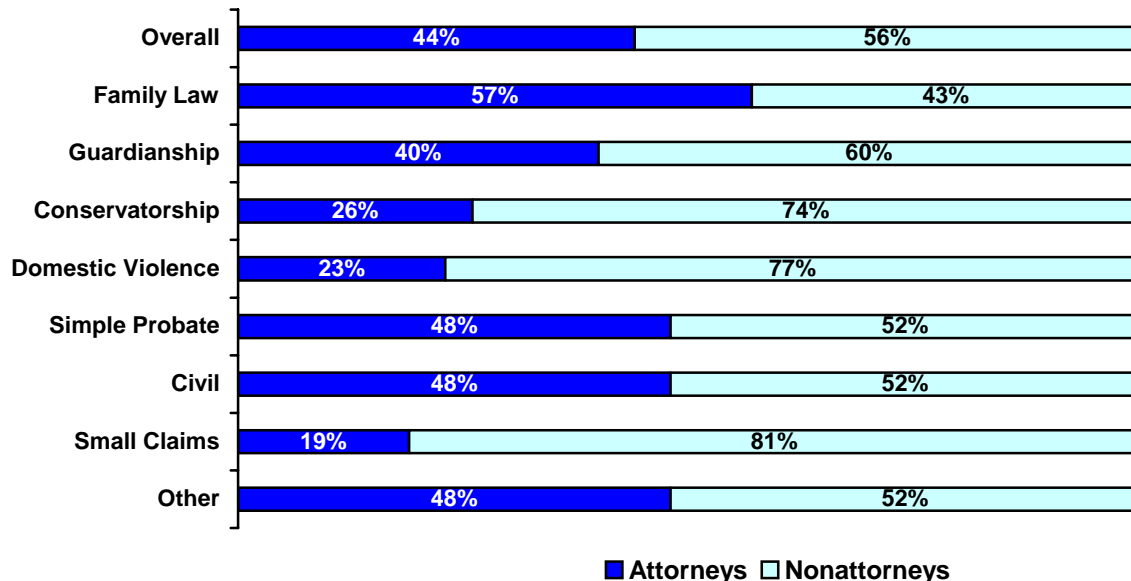
In estimating their total needs for providing complete assistance to self-represented litigants, the courts estimated that they would need approximately \$37,354,749 for staffing. This number accounts for 86 percent of the total cost estimate of \$44,003,364.

Ratio of Staff to Other Operations in Budget Requests



Allocations of staffing levels between attorney and nonattorney staff are set out below. Courts estimated the greatest need for attorneys to be in the area of family law, followed by simple probate, civil (including landlord-tenant), and other matters such as expungements and traffic.

Percent of Staffing Requests by Case Types



Substantial strides have been made toward the goal set out in the Action Plan for Serving Self-Represented Litigants that each court have an attorney-supervised, court-based self-help center that provides a full range of services to self-represented litigants. Ongoing funding is critical to maintain this increasingly important service.

Court-Community Partnerships and Collaborations

As courts continue their efforts to expand services for self-represented litigants and staff are hired to help coordinate these efforts, more resources become available to collaborate with legal services, pro bono programs, certified lawyer referral services, and bar programs dedicated to serving low-income persons. These collaborations are essential to ensuring a full continuum of legal services for litigants.

The *California Core Principles for Development of a Comprehensive Integrated System for the Provision of Legal Services (Core Principles)*, adopted in 2001, recognize that every local community must have access to a full continuum of culturally and linguistically appropriate services.²⁴ As recently highlighted in the California's Commission on Access to Justice's Proposed Action Plan, *Achieving True Access to Justice in California*,²⁵

[s]elf-help services are a key component of the continuum of legal services that is coordinated throughout the state, partnering and collaborating with other service providers in their community to ensure that individuals in need are directed to the service that can best provide the assistance they require.

The model of courts and community partners working together in a genuinely collaborative relationship to deliver a range of services that is user-focused has been an important innovation in California over the past 10 years. The success of the partnerships funded by the Equal Access Fund, has been a very important achievement, which laid the foundation for new ways of working toward improving access to the legal system by low- and moderate-income populations.

Ongoing communication among legal service providers is necessary to ensure appropriate services and referrals for self-represented litigants. Knowing what services are available in the community is a crucial element for court planning. If services are readily available to litigants in one area of the law, new services can focus on other types of problems or other types of litigants; and communication and coordination serve to minimize duplication of efforts and to maximize resources.

With funding for self-help programs, and the development of Self-Represented Litigant Action Plans throughout the state, many courts in the state began the process of communicating and collaborating with their local service providers to address the needs

²⁴ *California Core Principles for Development of a Comprehensive Integrated System for the Provision of Legal Services* (2001 State Plan).

²⁵ *Achieving True Access to Justice in California*, an action plan proposed by the California Commission on Access to Justice, p. 65. (April 2007).

of a growing population of litigants unable to afford an attorney or to obtain legal aid services.

Courts and legal services are involved in a variety of collaborations. The nature of the collaborations and partnerships between courts and community legal service providers is as varied as California's 58 counties. The types and extent of the collaborative efforts vary greatly from court to court, often directly related to the existence and reach of local services such as local bar associations, pro bono programs, and legal services agencies.

The most extensive partnerships and other collaborations are found in large urban courts, among other reasons because larger urban communities have more resources and a more established network of legal services providers. In those communities where there is a presence of legal services programs and bar association resources, self-help centers are involved in an active referral arrangement with these providers. Courts in these communities have actively networked with other services to streamline the steps involved in making referrals to facilitate the ability of self-represented litigants to navigate the legal system. Court and self-help staff interaction with other community agencies for purposes of streamlining referrals and cross-training also has led to a greater understanding of the nature of other services and increased liaison with them.

Many of the smaller courts in which grant funds have allowed the development of self-help services previously unavailable report being currently in the first phase of community engagement, and most have identified all stakeholders and crafted strategies for reaching them. In rural, isolated, or smaller counties, the opportunities for collaborations for courts are much more challenging, particularly in the many communities that have few or no other legal services providers located in the county.

Many of these courts, however, have found innovative ways to address these challenges. For example, Calaveras, Placer, El Dorado, and Amador Counties coordinated the use of their planning grant funds to contract with Legal Services of Northern California (LSNC), the primary provider of legal services for rural and small counties in Northern California, allowing LSNC to hire an additional attorney to provide self-help services at the different court locations.

Overall, those courts with successful collaborative projects have identified a number of elements necessary for these partnerships to adequately address the needs of their communities. Those elements include

- Good communications linking all those developing the service model and a willingness to work through differences in pursuit of a shared goal;
- A recognition that all participating interests need each other, given the scope of the undertaking, which exceeds the reach and capacity of any single organization;
- Respect for the contributions made by all collaborating organizations; and
- Involvement from the earliest possible time of local service providers so that local needs are clearly reflected in setting goals and the agenda.

Examples of collaborative and partnership projects that resulted from self-help funding

Superior Court of Alameda County. The staff of this county work closely with the Volunteer Legal Services Corporation of the Alameda County Bar Association (VLSC) and the community legal services program to provide assistance at several clinics held at the self-help centers in the county. For example, VLSC provides pro bono attorneys to assist self-represented litigants at the twice-monthly pro per guardian calendars and pro bono family law attorneys to assist self-represented litigants twice per month at the Oakland Self-Help Center. In addition, volunteer attorneys and law students provide assistance to landlords and tenants in the Oakland Self-Help Center, complementing the unlawful detainer clinics staffed by the East Bay Community Law Center, which also provides expungement clinics at the center in Oakland. VLSC volunteer attorneys provide monthly consumer debt clinics at the center.

The Alameda self-help staff work with myriad legal services throughout the large county, including the Law Center for Families, Legal Assistance for Seniors, Bay Area Legal Aid, East Bay Community Law Center, Centro Legal de la Raza, and Homeless Action Center. The court also closely collaborates with the different local bar associations, such as the Alameda County Bar Association, Alameda County Bar Association Lawyer Referral Service and Volunteer Legal Services Corporation, the Women Lawyers of Alameda County, and the South Asian Bar Association, and in the near future, the Asian American Bar Association.

In addition, court staff meet every month with the Community Projects Committee of the Alameda County Bar Association, which provides an excellent forum for court/community collaboration and dialogue. The court and the various agencies meet monthly to ensure coordinated services are provided to the residents of Alameda County. These agencies also conduct combined trainings. For example, attorney members of the local bar's Probate Section provided training in guardianship to staff in February 2007. In March 2007, the managing attorney of Legal Assistance for Seniors trained court staff regarding issues for elders.

Superior Courts of Butte, Tehama, and Glenn Counties. The joint project of these courts, the Self-Help Assistance Regional Project (SHARP), established in 2002, continues its success in serving isolated rural communities. SHARP exchanges information with Legal Services of Northern California (LSNC) and coordinates workshops to offer as many legal assistance opportunities in the community as possible.

Given the lack or inactivity of local bar associations in these counties and the absence of any pro bono programs, SHARP reached out to private members of the bar in all three counties. Through letters to private attorneys, SHARP introduced its program, locations, and services. SHARP also requested professional information from each practicing bar member to update referral lists for court customers needing legal advice and assistance beyond what SHARP can provide.

The court program coordinator has been working on outreach throughout the county, including the Willows and Orland Areas, Corning, Los Molinos, Hamilton City, Oroville, Paradise, Red Bluff, Gridley, and Chico. By meeting with local churches, other groups, libraries, grocery stores, and schools and participating in community fairs and information nights, the court program coordinator has been able to increase the visibility of SHARP and inform the community about what legal services are available.

Superior Court of Calaveras County. This county has no local bar association, no lawyer referral service, no pro bono programs, and not enough resources of its own to staff a self-help center. In order to provide self-help services, Calaveras and Amador collaborated in using their self-help funds to enter into a memorandum of understanding with Legal Services of Northern California (LSNC) for 48 hours of direct services and 17 hours of attorney-provided services by phone per month, and with HRC Community Legal Assistance Center for clerical support services to LSNC and the family law facilitator. In addition, the HRC Community Legal Assistance Center houses all the services, given the lack of space at the courthouse, and makes appointments for all the county's self-help programs. Intake and referrals and scheduling of workshops and clinics are all centralized and all services are provided at the same location. By coordinating with Placer, El Dorado, and Amador Counties, they were able to contract with Legal Services of Northern California to hire an additional attorney to provide coverage for the courts.

Superior Court of Fresno County. The multilingual services provided by the self-help center in the city of Fresno, through the mobile access program in other areas of the county, and through the new countywide telephone hotline, all increase access to the court for Fresno County residents. The self-help center works closely with its community legal services partners, such as Central California Legal Services (CCLS), the Centro la Familia, the Public Defender, the Department of Child Support Services, the local bar association, and the Fresno County Bar Association Lawyer Referral Service, among others. A number of the self-help center staff regularly attend the family law bar lunches in Fresno to develop and maintain working relationships with the private family law attorneys in Fresno County. The Fresno family law facilitator sits on the Access to Justice/Public Outreach Committee and meets regularly with other providers to discuss the provision of services and develop referral mechanisms from one agency to the other. It also has established a relationship with the Interpreter Program at Fresno State University to recruit certified and volunteer interpreters to meet the high demand for assistance for non-English speakers.

Court representatives, including judicial officers, have been meeting with other community members, such as members from the Hmong community, to establish a trusting relationship, provide information to those communities on court operations and services, and discuss community perceptions of the courts and outreach opportunities. In addition to the outreach to the Latino and Hmong community, self-help center staff will continue meeting with tribal entities in order to reach out to a population that has not traditionally sought court services. The Fresno self-help center also shares its packets and

materials, in English and Spanish, with other groups in Fresno County, such as Central California Legal Services.

Superior Court of Imperial County. This court has formed ongoing collaborations with California Rural Legal Assistance, the local bar association, the Center for Family Solutions, and Elder Law and Advocacy to provide services in a highly rural community with a significant low-income population and a very high number of Latino residents. E-mail contact between the self-help center and legal services agency providers is routine, and schedules are shared on a regular basis. In addition, self-help center staff regularly attend meetings at partner community agencies and are working toward sharing training.

Unique is the collaboration with the Mexican Universidad Autónoma de Baja California and its Bufete Jurídico in Mexicali, which provides four law student interns to the self-help center. An internship is a requirement for a law degree in Mexico, and using these students allows the self-help center to address the needs of monolingual Spanish-speaking litigants in a culturally and linguistically competent manner.

Superior Court of Lassen County. Because of the remote location and size of Lassen County, the court's resources are limited. Further, the county has no bar association nor pro bono programs. In order to improve access to justice to self-represented litigants in the community, the Superior Court of Lassen County has contracted with Legal Services of Northern California (LSNC) in Redding to provide self-represented litigants with legal assistance in the areas of small claims, landlord-tenant, civil harassment, guardianships, and civil complaints and answers. Self-represented litigants are also able to call LSNC toll-free. These services have been made possible with the self-help grants, which have significantly increased services previously limited to *one day per month* of appointments with LSNC in Susanville for self-represented litigants.

Superior Court of Los Angeles County. Building on a long history of successful partnerships with legal services agencies providing critical self-help services in branches throughout Los Angeles, the court hosted the first Conference of Community Partners in November 2006. The purpose of this conference was to initiate in-depth discussions about standards for self-help and related issues among the leadership of all community agencies that provide services in the courthouses, court self-help attorneys and administrators, and bench officers serving on community services committees. Working committees are being established to work on several issues key to the provision of services to the Los Angeles community. After a period of committee work, the larger conference will be reconvened to reach consensus on countywide standards for self-help and various protocols for ongoing collaboration and communication.

Before the Conference of Community Partners, Los Angeles already had several processes in place to ensure communication with other legal services providers in the county. Among these projects are:

- A bimonthly Family Law Pro Per Providers Working Group that includes legal service providers, the family law supervising judge and other bench officers, court administration, and court self-help staff;

- Regular participation by the court’s self-help attorneys in the Family Law Coordinating Council, hosted by the Legal Aid Foundation of Los Angeles;
- The existence of a court attorney charged with the responsibility for self-help collaboration with community legal services agencies; and
- A coordinated intake protocol at the court-operated Resource Center for the services within the center, services that currently include Bet Tzedek’s Elder Law Clinic and the Los Angeles Center for Law and Justice’s Default Assistance Program.

Future plans include:

- Coordinated intake protocols for all legal service programs countywide, both court-based and community-based;
- Working on ensuring consistency in services;
- Sharing of the work involved in the periodic updating of legal informational materials; and
- Developing combined trainings between court staff and community providers.

Superior Court of Riverside County. This court, through its Self-Represented Litigants Oversight Committee, has created collaborations with the local bar association and its pro bono program, the Public Service Law Corporation, to provide assistance at the courthouse and coordinate referrals. The primary partnership, however, is with Inland County Legal Services (ICLS), the main provider of legal services to low-income residents in the Inland Empire area. With ICLS, Riverside is able to offer assistance with family law issues, landlord tenant cases, and general civil cases to self-represented litigants in several of the nine court locations.

Superior Court of San Diego County. This court has several case-specific self-help centers operating in court facilities throughout San Diego County. In order to provide these services, the court has contracted with several community legal services providers, such as the Legal Aid Society of San Diego County, the San Diego Volunteer Lawyer Program, and the Center for Community Solutions, among others. In addition, the court is working with 211 Inform San Diego to install hotlines in several courthouse locations. This service will allow persons in need of assistance to obtain referrals to organizations that offer safe housing, food, employment, health, abuse prevention, and counseling services. It will also provide a countywide source of legal resource information for the public. It will be provided in and around the courthouse business offices on Self-Help Trees. The court will host quarterly meetings with all of the providers and will share schedules of clinics and workshops.

Superior Court of San Francisco County. This court’s ACCESS Center partners with several community agencies in order to meet its mandate to provide multilingual self-help services to the diverse population of the city and county. Given limited staffing, the center alone would not be able to provide assistance in its five target languages, Spanish, Chinese, Vietnamese, Russian, and Tagalog (in addition to English). Therefore, the center reached out to community legal and social service providers by pooling resources with

the community. Its primary partnership is with the Volunteer Legal Services Program of the Bar Association of San Francisco, with which it collaborates on an Unlawful Detainer Project (also partnering with the Eviction Defense Collaborative), a guardianship project, and new projects in the area of civil litigation that are currently under development. Other partnerships include La Raza Community Resource Center and Donaldina Cameron House, which primarily serve the Latino and Chinese communities, respectively. As part of these partnerships, ACCESS staff conduct outreach by holding clinics at these community agencies, participating in agencies' community activities, and copresenting radio programs with Cameron House's staff using its established radio shows.

Superior Court of Santa Clara County. The Santa Clara court has taken its partnerships on the road via a CourtMobile that travels to remote parts of the county to deliver legal services. The court's self-help CourtMobile targets agencies that will assist them by providing interpreters for customers with limited English skills.

The CourtMobile also visits the Emergency Housing Consortium (EHC) once a month with its Homeless Court to provide other legal help to homeless people. The EHC helps the court provide access by gathering information before their visit and helping the customers file the forms after the center provides the assistance.

The court has had to fill a lot of the need for legal assistance that legal services provided in the past. To this end, the court has been very active in collaborating with the Pro Bono Project. The self-help center holds evening small claims workshops twice per month. At one of the two monthly clinics, the Pro Bono Lawyers in the Library Program provides attorneys to talk to workshop participants about their cases prior to the workshop. In addition, the facilitator's office, local attorneys, and the pro bono project have developed a way to provide attorneys for both petitioners and respondents who are not represented for domestic violence restraining order hearings.

Santa Clara had its first local Legal Services Retreat in 2006. The retreat was very well attended by court and legal services providers and was a useful tool for them to learn more about each other and open the way to more one-on-one discussion among the local agencies. There are plans to hold another retreat in 2007.

Superior Courts of Sierra and Nevada Counties. These are rural courts, so the court self-help staff recognized it was imperative for the court to provide referrals and collaborate with as many service providers as possible to begin to serve families and children in need. Both counties have very limited resources. In fact, Sierra County has no attorneys in private practice. Since the Family Law Facilitator/Family Law Self-Help Office was set up in 1997, the facilitator has met frequently with all public and nonprofit groups and organizations that provide services to parents and children, understanding the importance of collaboration in order to meet the large need with minimum resources, ensuring there is no duplication of effort and that coordinated referrals occur.

The Nevada and Sierra County court's family law facilitator and the Public Law Center which is the civil self-help court based center, have been very active in collaborating with

the Nevada County Bar to revive the Lawyer Referral Service (LRS), a program of the Nevada County Legal Assistance, resulting in the LRS once again becoming state bar certified and officially re-opening. The court's self-help staff and local bar meet at least twice a month, and are planning their second board retreat in May 2007 to work toward re-opening the Nevada County Legal Assistance, aiming to provide some form of limited scope representation and other services for low income self-represented litigants

Superior Court of Sonoma County. The Superior Court of Sonoma County has approached the collaborative process from different angles to address access for self-represented litigants throughout the county.

It has partnered with the Superior Court of Napa County to improve services to their self-represented litigant populations. Because they are neighboring counties, their joint effort aims at establishing coordination of services between the two counties, not just at the court level, but at the community services level. The courts are using their planning grant funds to establish a manner within which to improve coordination of services within each respective county and to improve communication among pro bono programs, community-based organizations, legal services providers, court based legal services providers.

Sonoma County and community partners have established a countywide committee on self-represented litigants with a working subcommittee structure. The committee is in its initial stages and is composed of various community-based organizations, educational institutions, and court personnel. The committee is cochaired by a member of the court and a member of the legal services community. The purpose of the committee is to promote communication and collaboration among service providers and the court and to establish a continuum of services for pro per litigants in both the family and civil arena.

The self-represented litigant committee has begun discussions to create a more efficient and streamlined referral system for legal services providers, and is working on a protocol for referrals, outreach and education to fully inform county providers of the services provided by the self-help center. In addition, the committee is working with local attorneys to promote limited scope representation and pro bono services, and collaborating closely with the Sonoma Bar Association and its lawyer referral system to establish protocols and a system for referrals to the center.

Next steps in collaboration between legal services and bar associations. Most California courts have engaged in a process of partnering and collaborating with other government agencies, community legal services providers, and local bar associations in order to address the growing legal needs of their communities. Successful partnerships abound throughout the state, demonstrating the leadership and commitment of the judiciary, the Legislature, and legal service providers toward continuing to address the justice gaps in our state.

The Judicial Council will continue to encourage courts to collaborate with legal services to expand resources for self-represented litigants. The council is working to share sample

referral forms among programs, triage protocols, and other systems that are being developed by local courts and service providers to ensure that the needs of litigants are regularly assessed and referrals are made to the most appropriate assistance provider. As part of the court-community-focused planning process, courts are encouraged to meet with legal services representatives to identify what barriers self-represented and low-income litigants face and to work together to make the system more accessible.

The Judicial Council will also continue to work to expand funds for full representation through the Equal Access Fund and a model civil representation pilot program. The AOC will continue to focus on issues of collaboration and development of a true continuum of services through joint workshops with the Legal Aid Association of California, the California Commission on Access to Justice, and other entities committed to expanding legal resources.

Conclusion

The Judicial Council continues its multifaceted approach to most effectively meet the needs of self-represented litigants. With the support of the Legislature, it has significantly expanded the resources and services available to self-represented litigants throughout the state. Basic self-help services, operated under the direction of an attorney, are in all California counties. Courts are working with legal services partners to develop a true continuum of services. While there remains a funding gap of approximately \$35 million, it is clear that the courts have taken major steps with this initial funding to address critical needs.

Appendix A

	COUNTY	% Pop	FLF %	Average%	\$ Amount
1	Alameda	4.26%	3.7%	3.98%	\$49,724.12
2	Alpine	0.00%	0.3%	0.15%	\$1,897.29
3	Amador	0.10%	0.3%	0.20%	\$2,522.67
4	Butte	0.60%	1.0%	0.82%	\$10,232.47
5	Calaveras	0.12%	0.9%	0.51%	\$6,373.30
6	Colusa	0.06%	0.5%	0.29%	\$3,620.18
7	Contra Costa	2.80%	3.0%	2.90%	\$36,190.91
8	Del Norte	0.08%	0.5%	0.29%	\$3,617.94
9	El Dorado	0.46%	0.8%	0.63%	\$7,884.03
10	Fresno	2.36%	3.7%	3.04%	\$38,032.92
11	Glenn	0.08%	0.7%	0.39%	\$4,822.06
12	Humboldt	0.37%	0.8%	0.58%	\$7,260.96
13	Imperial	0.42%	0.4%	0.43%	\$5,400.75
14	Inyo	0.05%	0.6%	0.32%	\$4,037.83
15	Kern	1.95%	3.5%	2.74%	\$34,197.74
16	Kings	0.38%	0.5%	0.46%	\$5,717.50
17	Lake	0.17%	0.6%	0.37%	\$4,633.17
18	Lassen	0.10%	0.6%	0.35%	\$4,399.14
19	Los Angeles	28.10%	18.4%	23.24%	\$290,548.71
20	Madera	0.36%	0.7%	0.53%	\$6,683.78
21	Marin	0.73%	1.0%	0.88%	\$11,046.53
22	Mariposa	0.05%	0.5%	0.26%	\$3,208.15
23	Mendocino	0.25%	0.6%	0.43%	\$5,426.41
24	Merced	0.62%	0.9%	0.78%	\$9,710.34
25	Modoc	0.03%	0.5%	0.25%	\$3,066.42
26	Mono	0.04%	0.5%	0.26%	\$3,232.98
27	Monterey	1.19%	1.1%	1.13%	\$14,174.26
28	Napa	0.37%	0.6%	0.49%	\$6,127.84
29	Nevada	0.27%	0.9%	0.59%	\$7,323.19
30	Orange	8.40%	5.3%	6.87%	\$85,937.24
31	Placer	0.73%	0.9%	0.81%	\$10,186.41
32	Plumas	0.06%	0.6%	0.32%	\$3,941.50
33	Riverside	4.56%	5.9%	5.24%	\$65,556.42
34	Sacramento	3.61%	2.8%	3.19%	\$39,862.65
35	San Benito	0.16%	0.6%	0.39%	\$4,816.92

36	San Bernardino	5.05%	3.3%	4.19%	\$52,386.38
37	San Diego	8.31%	4.3%	6.30%	\$78,693.54
38	San Francisco	2.29%	2.1%	2.20%	\$27,486.58
39	San Joaquin	1.66%	2.0%	1.82%	\$22,688.96
40	San Luis Obispo	0.73%	0.6%	0.68%	\$8,546.18
41	San Mateo	2.09%	1.2%	1.63%	\$20,434.23
42	Santa Barbara	1.18%	1.6%	1.41%	\$17,588.92
43	Santa Clara	4.97%	4.3%	4.65%	\$58,167.64
44	Santa Cruz	0.75%	0.7%	0.71%	\$8,828.40
45	Shasta	0.48%	1.3%	0.89%	\$11,137.40
46	Sierra *	0.01%	0.3%	0.16%	\$1,940.60
47	Siskiyou	0.13%	0.8%	0.44%	\$,560.48
48	Solano	1.16%	1.3%	1.24%	\$15,504.22
49	Sonoma	1.35%	1.4%	1.36%	\$17,040.09
50	Stanislaus	1.32%	2.2%	1.78%	\$22,206.22
51	Sutter	0.23%	0.6%	0.42%	\$5,291.06
52	Tehama	0.17%	0.2%	0.21%	\$2,594.63
53	Trinity	0.04%	0.3%	0.17%	\$2,115.28
54	Tulare	1.09%	2.7%	1.89%	\$23,576.45
55	Tuolumne	0.16%	0.6%	0.37%	\$4,562.91
56	Ventura	2.22%	2.5%	2.37%	\$29,590.25
57	Yolo	0.50%	0.8%	0.63%	\$7,855.16
58	Yuba	0.18%	0.7%	0.42%	\$5,188.80
	TOTALS	100%	100%	100%	\$1,250,000

Appendix B

Use of Formula Grant and Planning Grant Funds

Alameda

- \$50,145—To hire an associate attorney in self-help services whose duties will include giving workshops; staffing clinics (general and specific topics); providing one-on-one assistance to litigants; drafting, developing, and maintaining instructional literature; and supervising and training interns, volunteers, and clerks and to pay for expenses associated with those services.
- \$10,000—To help develop a new JusticeCorps program, which will provide self-help assistance, including (1) student and community partner recruitment materials; (2) part-time, paid student assistance from one or more of the initial partner universities; (3) regional planning meeting expenses, including travel and materials costs; and (4) conference registration and associated travel.

Alpine

- \$1,913—To contract with Legal Services of Northern California for their Pro Per Project to provide at least a half-day per month in Markleeville and also to serve litigants in South Lake Tahoe.
- \$5,000—To provide funding for Legal Services of Northern California to provide self-help assistance as well as to purchase supplies and equipment for self-help services. To hold at least one meeting with Placer, El Dorado, Calaveras, and Amador Counties about potential collaboration.

Amador

- \$2,544—To supplement the family law facilitator's budget in order to provide non-AB 1058 services, primarily in the areas of custody and visitation, to self-represented litigants.
- \$10,000—To provide funding for Legal Services of Northern California and the Community Legal Assistance Center to provide self-help assistance and to purchase supplies and equipment for self-help services. To hold at least one meeting with Placer, El Dorado, Calaveras, and Alpine Counties about potential collaboration.

Butte

- \$10,319—To make the present self-help center managing attorney position, shared by Butte, Glenn, and Tehama Counties, a full-time rather than part-time position.
- \$10,000—To expand regional self-help services with Glenn and Tehama Counties.

Calaveras

- \$6,427—To expand the family law facilitator contract to allow the facilitator to assist persons with non-AB 1058 family law issues, primarily in a clinic setting, on initiating and concluding divorce and preparation of an order to show cause. To expand the small claims advisory program with Legal Services of Northern California

to include telephone services. To contract with the HRC Community Legal Assistance Center to provide facilities and clerical support (maintaining statistics, scheduling appointments, preparing forms) for both the expanded facilitator and small claims advisory programs.

- \$10,000—To provide funding for Legal Services of Northern California and the Community Legal Assistance Center for self-help assistance and to purchase supplies and equipment for self-help services. To hold at least one meeting with Placer, El Dorado, Amador, and Alpine Counties about potential collaboration.

Contra Costa

- \$36,497—To increase family law facilitator office (FLF) staff by two new full-time assistant family law facilitators to provide legal assistance to self-represented parties who have questions about dissolution, custody, visitation, simple property issues, and other family law issues.
- \$5,000—To hire temporary help to review family law cases and pull out data elements that can be used to establish a baseline and set benchmarks and other costs associated with expanding family law self-help assistance.

Del Norte

- \$3,649—To hire a contract attorney to review forms and recommend program enhancements. The court will produce a comprehensive list of possible programs and assistance that will be distributed to all customers in the self-help center.

El Dorado

- \$7,951—To contract with two support attorneys, one for South Lake Tahoe and one for Placerville. Each support attorney will conduct weekly workshops for self-represented litigants in other than AB 1058 matters.
- \$10,000—To contract with attorneys who will provide workshops and other self-help assistance in South Lake Tahoe and Placerville and for other costs associated with expanding self-help assistance. To hold at least one meeting with Placer, Amador, Calaveras, and Alpine Counties about potential collaboration.

Fresno

- \$43,335—To provide a new self-help hotline that will connect callers with the self-help service center. An examiner working at the center will provide triage by asking litigants questions about their cases to determine the appropriate next steps. The examiner will review court documents for completeness and assist in calendaring court dates. Litigants will be able to speak to the attorney to ask questions about documentation, the specific filing and processing requirements of their cases, or to get other general information to help them better understand and navigate the court system.

- \$10,000—To work with Kern County to develop and implement a regional strategic plan that addresses the needs of immigrants and persons in rural or geographically isolated areas, including costs of convening a community advisory group. To pay for costs for participants to travel to the Statewide Conference on Self-Represented Litigants, to visit other self-help centers, and for other costs with expanding self-help assistance.

Glenn

- \$4,863—To make the present self-help center managing attorney position shared by Butte, Glenn, and Tehama Counties a full-time rather than part-time position.
- \$10,000—To expand regional self-help services with Butte and Tehama Counties.

Humboldt

- \$7,322—To develop an order after hearing workshop and assist litigants with orders after hearing.
- \$5,000—To purchase equipment for self-help assistance, including a laptop computer, printer, rolling cart, and other materials.

Imperial

- \$5,446—To expand resources at the self-help center, which uses law student interns from Mexico to assist the facilitator.
- \$5,000—To expand resources at the self-help center.

Kern

- \$34,487—To provide signage in order to more effectively serve self-represented litigants.
- \$10,000—To work with Fresno County to develop and begin to implement a regional strategic plan that addresses the needs of immigrants and persons in rural or geographically isolated areas, including costs of convening a community advisory group and to pay for other costs with expanding self-help assistance.

Kings

- \$10,766—To pay for a contract attorney to provide assistance at the self-help center and to pay for associated materials and other costs of the center.

Lake

- \$4,672—To expand the duties of the family law facilitator, including dissolution workshops and assistance with child custody and visitation issues as identified in Family Code section 10005.
- \$10,000—To develop a regional plan with Mendocino County and to pay for costs associated with expanding self-help assistance.

Lassen

- \$4,436—To supplement the facilitator program; to provide attorney assistance in additional areas such as adoption, paternity, domestic violence, and guardianship; and for expanded self-help on-site attorney assistance for small claims litigants.
- \$10,000—To purchase and install teleconferencing equipment; print and copy form packets, brochures, flyers, and educational materials; and publicize self-help materials and purchase other supplies necessary to make seminars, clinics, and scheduled appointments productive for all self-represented litigants.

Los Angeles

- \$309,929—To expand self-help centers in the Central and Norwalk Courthouses. In Central, create an access center that will locate the self-help center and the office for filing and processing documents in one area. Expand the family law facilitator's staff so that general family law assistance can be provided throughout Los Angeles County.
- \$5,000—To develop triage and referral procedures and protocols and effective signage for the self-help center and to purchase a laptop computer and printer and other equipment necessary for self-help services.

Marin

- \$11,140—To expand services by hiring an attorney at an hourly rate to assist self-represented litigants, particularly those with family law issues.

Mendocino

- \$5,472—To develop a self-help center. In addition to providing forms, procedures, and Internet access to the public, contract attorney service providers will conduct two afternoon and evening clinics per month.
- \$10,000—To develop a regional plan with Lake County and pay for costs associated with expanding self-help assistance.

Modoc

- \$3,092—To expand the services of the family law facilitator (FLF) to include non-AB 1058 family law matters.
- \$10,000—To purchase and install teleconferencing equipment; print and copy form packets, brochures, flyers, and educational materials; and publicize self-help materials and purchase other supplies necessary to make seminars, clinics, and scheduled appointments productive for all self-represented litigants.

Monterey

- \$19,294—To expand services by hiring an attorney to provide services in addition to AB 1058 assistance and to purchase materials for self-help center.

Napa

- \$6,180—To cover the partial salary of the part-time judicial assistant providing legal services in Spanish under the direction of the family law facilitator, replacing one-time funding.
- \$10,000—To work in collaboration with Sonoma to identify areas where regional collaboration would increase access. To pilot the concept of rotating regional workshops on small claims and conservatorships and explore ways to provide other self-help assistance as effectively as possible. To hold at least one meeting with Solano and Sonoma Counties about potential collaboration.

Nevada

- \$7,385—To expand attorney services available at the Public Law Center.
- \$5,000—To pay for costs of equipment, signs, supplies, office remodeling, and other costs associated with expanding self-help assistance.

Orange

- \$86,665—To hire an attorney who will sit as a settlement officer to help parties reach agreements. On the days the settlement officer is not assisting with the self-represented parties calendar, that person will coordinate work in the self-help center.
- \$5,000—To organize and fund planning meetings with representatives from the court and local legal services agencies and to pay for costs associated with expanding self-help assistance.

Placer

- \$10,273—To expand the subject matter in which the self-help center is providing services, including general civil, conservatorship, and probate.
- \$10,000—To hold at least one meeting with Amador, Calaveras, El Dorado, and Alpine Counties about potential collaboration and to pay for costs of expanding self-help services.

Plumas

- \$3,975—To provide enhanced assistance to self-represented litigants in the family law area and support a volunteer site with the Portola C.A.R.E.S Resource Center.
- \$5,000—To provide enhanced self-help assistance, including EZLegalFile services.

Riverside

- \$66,111—To contract with an attorney to provide legal assistance to court users three half-days a week at the Riverside Self-Help Center, one full day a week at the Southwest Justice Center Self-Help Center, and one full day a week at the Larson Justice Center Self-Help Center.

- \$5,000—To pay costs of a consultant to create an overview of the court’s existing self-help program and services and make recommendations for expansion and for other costs associated with expanding self-help assistance.

Sacramento

- \$40,200—To contract with the Voluntary Legal Services Program of Northern California, Inc., (VLSP), in order to establish a self-help center at the Gordon D. Schaber Downtown Courthouse.
- \$10,000—To pay for costs of developing and publishing self-help materials and other costs associated with expanding self-help assistance. To have at least one meeting with Yolo County regarding potential collaboration.

San Benito

- \$4,858—To provide self-help services by through workshops and training essential staff on self-help resources.
- \$5,000—To develop a plan for expanded self-help assistance, including working with community agencies, the bar, and self-help providers in other communities, as well as to pay for costs associated with expanding self-help assistance.

San Bernardino

- \$52,830—To develop a guardianship assistance program (GAP) in the San Bernardino Courthouse.

San Diego

- \$79,360—To increase family law facilitator staff attorney resources in the South County Division and increase services available at Central Division’s Civil Harassment Restraining Order (CHRO) and Unlawful Detainer (UD) Self-Help Clinics by expanding hours of clinic operations through contracts with legal services agencies. To provide UD assistance in South County.
- \$5,000—To cover costs of additional participants at the Statewide Conference on Self-Represented Litigants, to update the Local Resource List Portion of the San Diego May 2002 Community-Focused Action Plan for Self-Represented Litigants, and to pay for other costs associated with the expansion of self-help assistance.

San Francisco

- \$27,719—To provide for expanded legal assistance to mediate financial matters, provide reports to the court, and conduct exit interviews so that participants leave the courthouse with a better understanding of court orders. To provide assistance with limited and unlimited jurisdiction civil matters.
- \$10,000—To help develop a new JusticeCorps program to provide self-help assistance, including (1) student and community partner recruitment materials; (2) part-time, paid student assistance from one or more of the initial partner universities;

(3) regional planning meeting expenses, including travel and materials costs; and (4) conference registration and associated travel.

San Joaquin

- \$22,881—To provide self-help services to domestic violence and elder abuse victims. This will include helping with restraining orders or any other legal documents.

San Luis Obispo

- \$13,619—To expand time of facilitator to pay for services not provided under AB 1058 and to provide additional services to self-represented litigants in other family law matters.

San Mateo

- \$20,607—To expand the existing services of the family law facilitator by adding a bilingual (Spanish/English) attorney to effectively deliver services to monolingual Spanish speakers. This attorney will also lead workshops in Spanish that are currently not offered by the family law facilitator's office.
- \$10,000—To help develop a new JusticeCorps program to provide self-help assistance, including (1) student and community partner recruitment materials; (2) part-time, paid student assistance from one or more of the initial partner universities; (3) regional planning meeting expenses, including travel and materials costs; and (4) conference registration and associated travel.

Santa Barbara

- \$17,738—To assist in preparation of orders after hearing in child support and related family law matters.

Santa Clara

- \$58,660—To add an attorney position that would act as volunteer coordinator, coordinating the activities of legal self-help interns, domestic violence case manager interns, and volunteer interpreters for court customers.
- \$10,000—To help develop a new JusticeCorps program to provide self-help assistance, including (1) student and community partner recruitment materials; (2) part-time, paid student assistance from one or more of the initial partner universities; (3) regional planning meeting expenses, including travel and materials costs; and (4) conference registration and associated travel.

Santa Cruz

- \$8,903—To expand services of the facilitator beyond AB 1058-related tasks.

Shasta

- \$11,232—To establish a new self-help center using a contract attorney and a clerical staff person.

Sierra

- \$1,957—To expand hours of contract paralegal staff operating under supervision of the family law facilitator in areas of guardianship and family law.

Siskiyou

- \$5,608—To expand assistance to self-represented litigants using an assistant to the facilitator.
- \$5,000—To pay for costs associated with expanding self-help assistance in the section of the law library dedicated to self-help services.

Solano

- \$15,635—To provide additional services, beyond that of child support, such as guardianship, dissolution of marriage, judgments, and domestic violence restraining orders, not supplanting existing resources.
- \$10,000—To hire a consultant to interview courts that currently provide orders after hearing to self-represented litigants and make recommendations regarding how the court could provide that service, to hold at least one meeting with Sonoma and Napa Counties regarding potential collaborations, and to pay for other costs associated with expanding self-help assistance.

Sonoma

- \$17,184—To expand the hours of the part-time (30 hours/week) paralegal staff member who works at the self-help access center and in the family law facilitator's office to a full-time position. The additional hours will be used primarily to expand services provided in the family law facilitator's office. The duties will be to work on non-AB 1058 matters.
- \$10,000—To work in collaboration with Napa to identify areas where regional collaboration would increase access. To pilot the concept of rotating regional workshops on small claims and conservatorships and explore ways to provide other self-help assistance as effectively as possible. To hold at least one meeting with Solano and Napa Counties about potential collaboration.

Stanislaus

- \$22,394—To provide additional self-help services for non-AB 1058 services through the use of a part-time attorney to review and supervise the self-help clerk and through use of a new self-help center open to all self-represented litigants.

- \$5,000—To pay for costs of expanding self-help assistance, including office supplies, printing and photocopying, telephone and communications, travel, postage, and equipment.

Sutter

- \$5,336—To expand Family Law Information Center services by adding two evening clinics per week and by adding four case types to clinic offerings. These case types include stepparent adoption/termination of parental rights, guardianship, complex service issues, and small claims. To hold twice-a-month evening attorney consultation appointments targeting non-English speakers and persons with literacy issues.

Tehama

- \$2,617—To make the present self-help center managing attorney position shared by Butte, Glenn, and Tehama Counties a full-time rather than part-time position.
- \$10,000—To expand regional SHARP services with Glenn and Butte Counties.

Tulare

- \$23,776—To develop a self-help center for court users in the areas of family law (non-AB 1058), restraining orders, guardianship, and conservatorship petitions, and stepparent adoptions. This will involve allocating a portion of the family law facilitator’s time, not supplanting existing resources, and hiring a paralegal to assist in this project.
- \$5,000—To hold a forum on expanding self-help assistance and to pay for travel of court staff to other self-help centers as well as other costs associated with expanding self-help assistance.

Tuolumne

- \$9,602—To provide self-help assistance in the areas of custody and visitation and pay for associated costs.

Ventura

- \$29,841—To hire a part-time attorney to work up to 1.5 days per week to assist with family law matters at the Self-Help Legal Access (SHLA) Center in the Simi Courthouse.

Yolo

- \$7,922—To get EZLegalFile services and implement its usage in collaboration with facilitator.
- \$10,000—To have at least one meeting with the Sacramento court about potential collaboration and to pay for costs of EZLegalFile for one year.

Yuba

- \$5,233—To increase the family law facilitator’s hours to provide services not covered by AB 1058.

Appendix C

One-Time Funding: Trial Court Improvement and Modernization Funds

Name of Court	Grant Amount	What Grant Covers
Calaveras	\$5,000	Furniture and equipment needed for self-help center
El Dorado	\$12,000	Equipment needed for self-help centers at two locations
Lake	\$45,891	Costs of videoconferencing to start regional project
Lassen	\$6,110	Costs to start self-help center
Mendocino	\$10,000	Costs for equipment and furniture for self-help center
Plumas	\$5,000	Materials necessary for new self-help center
Riverside	\$53,394	Videoconferencing equipment and setup costs
San Benito	\$3,000	Computer equipment for self-help center
San Bernardino	\$8,000	Equipment needed for self-help center
San Diego	\$32,293	Equipment, furniture, and furnishings for self-help programs
San Francisco	\$15,000	Costs of equipment and materials for new self-help center
San Joaquin	\$6,000	Costs of materials and equipment for self-help center
San Luis Obispo	\$6,500	Equipment and materials for new self-help center
Stanislaus	\$19,812	Costs of establishing self-help center
Tulare	\$7,000	Equipment needed for new self-help center
Ventura	\$15,000	Costs for videoconferencing for self-help center
Total	\$250,000	

MODERNIZATION FUNDS

(Based on applications by courts for one-time funding)

San Mateo	\$50,000	EZLegalFile expansion to finalize family law area
Sacramento	\$50,000	EZLegalFile expansion to finalize family law area
Yolo	\$4,519	EZLegalFile subscription
Total	\$104,519	

Appendix D

Regional Opportunity Awards for Self-Help Projects

FY 2005–2006

Court	Award Amount	Project
Contra Costa	\$48,200	Establish a Triage Center as part of the Family Law Expansion Program. Fund evaluation study of the Virtual Self-Help Law Center.
Los Angeles	\$143,000	Contribute to the creation of a family access center in the Stanley Mosk Courthouse combining in one location Family Law and Probate filing windows, clerical processing area for case creation and document scanning, Unified Courts for Families crossover case identification, judgment processing, and an integrated self-help assistance center. Purchase of assistive listening devices.
San Diego	\$2,000	Purchase monitors and DVD players that can be used for training purposes and how-to workshops with the public.
San Joaquin	\$16,364	Provide funding to conduct guardianship workshops three times per week and probate workshops one hour per week, and provide for a one-hour per conservator workshop clinic at self-help center.
Santa Cruz	\$50,000	Furnish full-service self-help center near new Watsonville court; translate self-help materials into Spanish.
Shasta	\$34,018	Fund initial start-up costs to establish a self-help center: purchase furniture, computers, office equipment, and printers for both the staff as well as public (four public-use kiosks).
Solano	\$26,300	Establish self-help centers in both Vallejo and Fairfield courts. Provide computer terminals linked to Internet, provide classroom instruction, and create educational videos.
Ventura	\$22,932	Purchase of two self-service kiosks based on the 2002 Kleps Award-winning project in Orange County.
Total	\$342,755	

Appendix E

JusticeCorps

The Judicial Council provided \$125,000 to help expand the innovative JusticeCorps beyond the Superior Court of Los Angeles, where it was founded, to the San Francisco Bay Area, serving Alameda, San Francisco, San Mateo, and Santa Clara. JusticeCorps annually recruits, trains, and coordinates the activities of more than 140 university students to help court and legal aid staff provide assistance for self-represented litigants. These highly motivated and well-trained students are placed in court-based self-help programs where they help to enhance the quality and quantity of services provided. JusticeCorps requires a yearlong commitment from each student, each of whom must serve a minimum of 300 hours. Students completing the service commitment receive \$1,000 for tuition or student loans from AmeriCorps.

JusticeCorps recruits perform a variety of services, from conducting the initial interview to determine what services a litigant needs and making referrals to completing accurate pleadings under attorney supervision. JusticeCorps students help litigants uncomfortable with technology use computer self-help resources. JusticeCorps members can often give litigants more time than staff can. This allows them to listen to litigant stories and problems, providing friendly and respectful assistance. The students follow through to make sure litigants receive as much assistance as possible and that they understand exactly what they need to do. The recruits provide unrepresented litigants with a better understanding of the court system.

JusticeCorps members also benefit from their participation in the program. Undergraduate students gain invaluable experience that enhances their law school or graduate studies. By partnering students with mentor judges and attorneys, JusticeCorps exposes the students to a wide range of career options within the judicial system. In addition, students observe the great need for legal services among the poor and middle class. As they internalize the value of public service, they are more likely to pursue careers in public legal services or as future professionals, to make pro bono commitments a greater priority.

Appendix F

2006 Self-Help Funds – Ongoing

County	Baseline @ \$34,000 from \$3.7 M	Additional amount from \$3.7 M (\$1.728 M) allocated by population	\$5 M allocated by population	Total Allocation
CALIFORNIA	\$1,972,000	\$1,728,000	\$5,000,000	\$8,700,000
ALAMEDA	34,000	70,208.83	203,150.54	307,359.37
ALPINE	34,000	57.69	166.93	34,224.62
AMADOR	34,000	1,772.67	5,129.26	40,901.93
BUTTE	34,000	10,097.30	29,216.74	73,314.04
CALAVERAS	34,000	2,124.95	6,148.58	42,273.53
COLUSA	34,000	1,000.02	2,893.57	37,893.59
CONTRA COSTA	34,000	47,852.22	138,461.29	220,313.51
DEL NORTE	34,000	1,357.22	3,927.15	39,284.37
EL DORADO	34,000	8,191.12	23,701.16	65,892.29
FRESNO	34,000	41,815.33	120,993.44	196,808.77
GLENN	34,000	1,331.89	3,853.84	39,185.73
HUMBOLDT	34,000	6,160.68	17,826.04	57,986.73
IMPERIAL	34,000	7,743.97	22,407.31	64,151.28
INYO	34,000	860.70	2,490.45	37,351.15
KERN	34,000	36,253.45	104,900.02	175,153.46
KINGS	34,000	6,867.42	19,871.00	60,738.41
LAKE	34,000	2,980.02	8,622.75	45,602.77
LASSEN	34,000	1,648.04	4,768.64	40,416.68
LOS ANGELES	34,000	476,281.64	1,378,129.76	1,888,411.40
MADERA	34,000	6,712.48	19,422.68	60,135.15
MARIN	34,000	11,776.96	34,076.85	79,853.80
MARIPOSA	34,000	846.80	2,450.23	37,297.03
MENDOCINO	34,000	4,204.48	12,165.74	50,370.22
MERCED	34,000	11,470.61	33,190.43	78,661.04
MODOC	34,000	457.24	1,323.04	35,780.28
MONO	34,000	632.08	1,828.93	36,461.01
MONTEREY	34,000	19,749.45	57,145.41	110,894.86
NAPA	34,000	6,249.84	18,084.03	58,333.88

NEVADA	34,000	4,651.73	13,459.86	52,111.58
ORANGE	34,000	142,822.41	413,259.28	590,081.68
PLACER	34,000	14,713.38	42,573.43	91,286.80
PLUMAS	34,000	996.86	2,884.43	37,881.29
RIVERSIDE	34,000	90,803.64	262,742.01	387,545.65
SACRAMENTO	34,000	64,412.14	186,377.71	284,789.85
SAN BENITO	34,000	2,678.88	7,751.40	44,430.28
SAN BERNARDINO	34,000	92,593.33	267,920.50	394,513.83
SAN DIEGO	34,000	142,565.99	412,517.32	589,083.31
SAN FRANCISCO	34,000	37,127.90	107,430.28	178,558.19
SAN JOAQUIN	34,000	31,065.36	89,888.19	154,953.54
SAN LUIS OBISPO	34,000	12,237.22	35,408.63	81,645.85
SAN MATEO	34,000	33,661.12	97,399.08	165,060.20
SANTA BARBARA	34,000	19,599.91	56,712.69	110,312.60
SANTA CLARA	34,000	82,432.71	238,520.56	354,953.27
SANTA CRUZ	34,000	12,195.80	35,288.78	81,484.58
SHASTA	34,000	8,436.52	24,411.24	66,847.77
SIERRA	34,000	162.75	470.92	34,633.67
SISKIYOU	34,000	2,145.17	6,207.09	42,352.26
SOLANO	34,000	19,656.76	56,877.20	110,533.96
SONOMA	34,000	22,310.26	64,555.15	120,865.41
STANISLAUS	34,000	23,911.30	69,187.80	127,099.11
SUTTER	34,000	4,251.20	12,300.92	50,552.12
TEHAMA	34,000	2,860.46	8,276.79	45,137.25
TRINITY	34,000	651.93	1,886.37	36,538.29
TULARE	34,000	19,553.14	56,577.37	110,130.51
TUOLUMNE	34,000	2,706.96	7,832.64	44,539.60
VENTURA	34,000	37,995.62	109,941.04	181,936.66
YOLO	34,000	8,848.44	25,603.13	68,451.57
YUBA	34,000	3,246.02	9,392.42	46,638.43
TOTAL	\$1,972,000	\$1,728,000	\$5,000,000	\$8,700,000

Appendix G

Results of Baseline Survey

Expenses Category	Attorney Time	Nonattorney Staff Time	Informational Materials	Other Direct Costs	Total Additional Amount Needed for Ongoing Cost	One Time Costs
Child Support Over and Above AB 1058 (Family Law Facilitator) Grant	\$3,296,892.28	\$1,215,480.53	\$69,004.80	\$1,741,566.78	\$6,322,944.39	\$525,758.66
Family Law (Divorce, Adoptions, Custody, Parentage, etc.)	\$6,377,716.53	\$6,207,066.69	\$277,009.14	\$1,399,622.49	\$14,261,414.85	\$1,140,623.42
Guardianship	\$1,481,368.56	\$2,261,020.35	\$111,316.00	\$336,300.32	\$4,190,005.23	\$442,885.41
Domestic Violence	\$1,049,539.46	\$3,539,625.22	\$80,100.38	\$418,708.22	\$5,084,973.28	\$503,924.41
Conservatorship	\$568,092.75	\$1,649,513.90	\$52,850.00	\$212,221.81	\$2,482,678.46	\$238,452.14
Simple Probate	\$428,612.24	\$470,275.10	\$33,158.48	\$98,077.41	\$1,030,123.23	\$116,949.86
Civil (including Landlord/Tenant, Debt Collection, etc.)	\$2,297,831.62	\$2,437,751.50	\$148,440.48	\$668,844.68	\$5,552,868.28	\$439,416.41
Small Claims Additional Resources Beyond Small Claims Advisor Funds	\$603,247.45	\$2,596,327.30	\$72,393.80	\$754,829.10	\$4,026,797.65	\$438,812.40
Other (including Traffic Infractions and Expungements)	\$425,099.22	\$452,288.72	\$65,246.32	\$108,928.08	\$1,051,562.34	\$142,178.08
Total	\$16,525,400.11	\$20,829,349.32	\$909,519.40	\$5,739,098.89	\$44,003,367.71	\$3,989,000.79

Services to be Provided	Self-Help Center	Help in Courtroom (Assisting with forms, explanations)	Mediation	Other (describe)
Child Support Over and Above AB 1058 (Family Law Facilitator) Grant	28	16	16	11
Family Law (Divorce, Adoptions, Custody, Parentage, etc.)	44	34	26	22
Guardianship	42	20	15	21
Domestic Violence	41	25	10	19
Conservatorship	34	12	7	11
Simple Probate	31	8	4	11
Civil (including Landlord/Tenant, Debt Collection, etc.)	40	10	16	19
Small Claims Additional Resources Beyond Small Claims Advisor Funds	31	10	15	15
Other (including Traffic Infractions and Expungements)	26	4	4	8
Total	317	139	113	137

Appendix H

Self-Help Baseline Report

What services does your court currently offer that would be part of your court-based, attorney-supervised, staffed self-help center?

I. SELF-HELP CENTERS

Do you currently have a program that you identify as a self-help center in your court?

- YES NO

a. If yes, what types of cases does your self-help center handle?

- | | |
|--|---|
| <input type="checkbox"/> Guardianship | <input type="checkbox"/> Landlord-tenant |
| <input type="checkbox"/> Consumer | <input type="checkbox"/> Conservatorship |
| <input type="checkbox"/> Family law | <input type="checkbox"/> Traffic |
| <input type="checkbox"/> Domestic violence | <input type="checkbox"/> Other civil (please list types of cases) |
| <input type="checkbox"/> Civil harassment | |

b. How is the self-help center staffed?

<u>Staffing</u>	<u>FTE</u>	<u>Contract</u>	<u>Brief Description of Duties</u>
Attorneys			
Paralegals			
Clerks			
Clerical			
Volunteers (rough estimate)			

c. What is the average number of customers per month receiving services from the self-help center? _____ (You may count repeat customers each time they come in.)

If not included in section I above:

II. FAMILY LAW FACILITATOR—NON-AB 1058 FUNDING

Does your family law facilitator provide services beyond AB 1058 using additional funding?

YES **NO**

a. If yes, what types of non-AB 1058 services does the facilitator provide?

- Custody/visitation
- Dissolution
- Domestic violence
- Adoption
- Other family law (please list types of cases or issues)

- Guardianship
- Consumer
- Civil harassment
- Landlord-tenant
- Conservatorship
- Other civil (please list types of cases)

b. What type of staffing is available for the non-AB 1058 services of the facilitator?

<u>Non-AB 1058 Staffing</u>	<u>FTE</u>	<u>Contract</u>	<u>Brief Description of Duties</u>
Attorneys			
Paralegals			
Clerks			
Clerical			
Volunteers (rough estimate)			

c. What is the average number of customers per month receiving non-AB 1058 services from the facilitator? _____ (You may count repeat customers each time they come in.)

III. SMALL CLAIMS

a. Who provides small claims advisor service in your county?

- Court staff
- County staff
- Legal services—contract is with: county court
- Private attorney—contract is with: county court
- Other (please describe):

b. What types of services does the small claims advisor provide? (check all that apply)

- Clinics
- Individual assistance
- Telephone assistance
- Mediation
- Workshops
- Other (please describe):

c. What is the average number of customers per month receiving services from the small claims advisor? _____ (You may count repeat customers each time they come in.)

d. Will your small claims advisor service be part of your self-help center?

IV. LEGAL SERVICES PROGRAMS AT THE COURT

Do any of the legal services programs in your county provide self-help services at your court?

YES NO

If yes, please provide the names of the legal services agencies and a description of the services they provide.

LEGAL SERVICES AGENCY	COURT LOCATION OF SERVICE	DESCRIPTION OF SERVICES PROVIDED

Appendix I
Legislative Report Data

COURT NAME:
CONTACT PERSON:
PHONE:
E-MAIL:

I. A. INFORMATION ON SELF-HELP CENTER

1. Is your self-help center currently open to the public? YES NO

2. If not, please describe the progress that has been made.

- Selected a managing attorney
- Established space for the self-help center
- Purchased equipment (*please specify*)
- Other (*please specify*)

If you do not have a self-help center yet, when do you plan to open your center? _____

3. If yes, please answer the following:

	Yes	No	How many?
A. Does your center have a managing attorney?	<input type="checkbox"/>	<input type="checkbox"/>	_____
B. Are there supporting attorneys?	<input type="checkbox"/>	<input type="checkbox"/>	_____
C. Are there paralegals?	<input type="checkbox"/>	<input type="checkbox"/>	_____
D. Does court clerk staff work in the center?	<input type="checkbox"/>	<input type="checkbox"/>	_____
E. Is there other clerical support for the self-help center staff?	<input type="checkbox"/>	<input type="checkbox"/>	_____
F. Do volunteers work in the center (attorneys or nonattorneys)?	<input type="checkbox"/>	<input type="checkbox"/>	_____

4. What types of self-help services does your center or program currently provide?

- | | |
|--|---|
| <input type="checkbox"/> Guardianship | <input type="checkbox"/> Civil harassment |
| <input type="checkbox"/> Conservatorship | <input type="checkbox"/> Landlord-tenant |
| <input type="checkbox"/> Dissolution | <input type="checkbox"/> Consumer |
| <input type="checkbox"/> Custody/visitation | <input type="checkbox"/> Name change |
| <input type="checkbox"/> Adoption | <input type="checkbox"/> Traffic |
| <input type="checkbox"/> Title IVD child support | <input type="checkbox"/> Expungements |
| <input type="checkbox"/> Non-Title IVD child support | <input type="checkbox"/> Immigration |
| <input type="checkbox"/> Spousal support | <input type="checkbox"/> Small claims |
| <input type="checkbox"/> Other family law | <input type="checkbox"/> Other civil (please list types of cases) |
| <input type="checkbox"/> Domestic violence | |

5. If you provide more than one self-help center, please describe any major differences between the centers.

6. How are you providing assistance? (please check all that apply)

- Individual assistance
 - Drop-in service
 - Service by appointment
- Workshops
 - Telephone assistance (public phone number _____)
 - E-mail assistance (public e-mail address _____)
 - Courtroom services (such as assistance in courtroom for pro per calendars)
 - Settlement assistance (such as mediation)
 - Other (specify)

7. What is the average number of customers per month receiving services from the self-help center? _____ (You may count repeat customers each time they come in.)

8. Please provide any demographic information and administrative data that you may have collected about the self-help center customers and their case types or issues.

9. Do you have any bilingual staff that can assist customers with limited English proficiency? If so, which languages do they speak?

10. Please give an example of how your self-help services improve access, efficiency, and/or effectiveness in your court.

11. Please give an example of how your self-help services benefit the community.

12. Please attach copies of any materials developed during this grant period for the self-help center, including instructional materials, brochures, and job descriptions (preferably electronically).

B. INFORMATION ON PLANNING GRANTS

If you received a grant under “B” for planning or regional coordination, please report on those activities. How were the funds used? How did they assist your efforts to serve self-represented litigants? Please attach a copy of any report, plan, or evaluation based on those efforts.

C. INFORMATION ON FUNDING FOR ONE-TIME COSTS

If you received a grant under “C” for one-time costs, please report on how those funds were spent. What was purchased? How are these one-time costs assisting your efforts to serve self-represented litigants?

II. COORDINATION WITH LEGAL SERVICES

The Judicial Council is also required to report to the Legislature by July 1, 2007, the extent to which court-based self-help programs have coordinated with community-based legal resources such as qualified legal services providers, pro bono providers, and local bar associations, to help identify needed services and allow for appropriate referrals.

This reporting requirement is intended to promote the critical communication among service providers necessary to ensure appropriate referrals for self-represented litigants. While some situations can be handled entirely by a self-help center, others will need full or partial representation.

It is also important for planning to know what services are available in the community. If services are readily available to litigants in one area of the law, new services can focus on other types of problems or other types of litigants.

Communication and coordination also serve to minimize duplication of efforts and to maximize resources. For example, programs often have developed excellent materials that they are willing to share, or they may offer trainings that are helpful for other programs in their community.

If you have already had such a meeting or have agreed upon protocols, please describe below. If you need additional time to have such a meeting, please contact Bonnie Hough at 415-865-7668 or bonnie.hough@jud.ca.gov to discuss the timeline and any questions you may have. This portion of the report should be completed by February 28, 2006.

I. With which legal services agencies and bar associations are you collaborating?

A. Which programs have you met with? (please list names):

1. Legal services
2. Local bar associations
3. Pro bono programs

B. Which additional programs do you plan to meet with? (please list name and anticipated month of meeting):

II. Self-Help Center Referral

A. Which customers will the court's self-help center refer to legal services and pro bono programs? Who will be receiving which referrals? Some bases for making referrals are listed below.

- i. Case types
- ii. Service level needs
- iii. Other criteria

B. Which customers will the court's self-help center refer to the local bar association or certified lawyer referral program?

III. Legal Service Referrals

A. When will the community legal service providers and pro bono programs refer individuals to the court's self-help center?

B. When will the bar association and certified lawyer referral service program refer to the self-help center?

IV. Coordination Strategy

A. How will ongoing communication be maintained between the self-help center and community legal services and pro bono programs?

B. Will there be any kind of coordinated intake protocol?

C. Will schedules of clinics, workshops, etc. be shared?

D. Will instructional material be shared?

E. Will there be any combined trainings for staff?

F. Will there be any sharing of language access ability or translations?

V. Service Provision

Do any of the legal services programs in your county provide self-help services at your court? YES NO

If yes, please:

- a. List the name(s) of the legal services provider(s);
- b. Provide a brief description of the services provided; and
- c. Attach a copy of any contract or memorandum of understanding between the court and the provider for those services.