

California Conference On  
**Self-Represented Litigants**

San Francisco • May 14-18, 2007



ADMINISTRATIVE OFFICE  
OF THE COURTS

CENTER FOR FAMILIES, CHILDREN  
& THE COURTS



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*The points of view expressed at the conference and in the conference materials are those of the authors and presenters and do not necessarily represent the official positions or policies of the Judicial Council of California.*

**Monday, May 14, 2007 at the AOC—Midyear Family Law Facilitator Program  
and Preconference Workshops for Statewide Conference on Self-Represented Litigants**

- 7:30–8:30 a.m. Continental Breakfast/Registration
- 8:30–10:15 a.m. Welcome/DCSS Update/AOC Update (*Open to Family Law Facilitators Only*) Auditorium
- 10:15–10:30 a.m. Break
- 10:30–12:00 p.m. 1. Family Law Facilitator Expansion Policy Overview by AOC staff and Issues Identification Exercise by Group (*Open to Family Law Facilitators Only*) Auditorium  
2. Guardianships San Diego
- 12:00–1:00 p.m. Lunch
- 1:00–3:00 p.m. 1. Family Law Facilitator Expansion—AOC Responds (Q&A) (*Open to Family Law Facilitators Only*) Auditorium  
2. Conservatorships and Probate of Small Estates San Diego
- 3:00–3:30 p.m. Break
- 3:30–5:00 p.m. Roundtable Discussions  
1. Family Law Facilitators (Focus will be on FLF/Self-Help Expansion Practical Issues) (*Open to Family Law Facilitators Only*) San Diego  
2. Self-Help Center and Small Claims Attorneys Benicia  
3. Self-Help Center Staff and Nonattorney Small Claims Advisors Santa Barbara  
4. Law Librarians Monterey
- 5:15–6:30 p.m. Family Law Facilitator Association Meeting (*optional – Open to Family Law Facilitators Only*)

**Tuesday, May 15, 2007 at the AOC – Midyear Family Law Facilitator Program Meeting  
and Pre-conference workshops for Statewide Conference on Self-Represented Litigants**

- 7:30–8:30 a.m. Continental Breakfast/Registration
- 8:30 a.m.–5:00 p.m. 1. Skills-Based Workshop for Judicial Officers: Benicia  
Communicating With Self-Represented Litigants  
2. Developing an Evaluation Strategy for Your Self-Help Center Monterey
- 8:30–8:45 a.m. Welcome/Overview

# AT-A-GLANCE AGENDA

8:45–10:15 a.m. 1. Paternity and Support Case Law Update (Part 1) **Auditorium**  
2. Consumer and Small Claims Law and Updates (Part 1) **San Diego**  
3. California Guideline Child Support Calculator (DCSS) **Bodega Room, 3rd Floor**  
*(Limited attendance, hands-on)\**

10:15–10:30 a.m. Break

10:30–12:00 p.m. 1. Paternity and Support Case Law Update (Part 2) **Auditorium**  
2. Consumer and Small Claims Law and Updates (Part 2) **San Diego**  
3. California Guideline Child Support Calculator (DCSS) **Bodega Room, 3rd Floor**  
*(Limited attendance, hands-on)\**  
4. Law Librarians Strategizing for Partnerships (Part 1) **Santa Barbara**

12:00–1:00 p.m. Lunch

1:00–3:00 p.m. 1. Ethics **Auditorium**  
2. Expungements and Traffic **San Diego**  
3. California Guideline Child Support Calculator (DCSS) **Bodega Room, 3rd Floor**  
*(Limited attendance, hands-on)\**  
4. Law Librarians Strategizing for Partnerships (Part 2) **Santa Barbara**

3:00–3:30 p.m. Break

3:30–5:00 p.m. 1. Facilitator/Self-Help Expansion—Financial Impact/What Facilitators and Court Administrators Need to Know **Auditorium**  
2. Landlord/Tenant Basics **Santa Barbara**  
3. California Guideline Child Support Calculator (DCSS) **Bodega Room, 3rd Floor**  
*(Limited attendance, hands-on)\**

5:15–7:15 p.m. Reception/Knowledge Fair **Great Hall**  
Including tours of the California Supreme Court, the Santa Clara Mobile Self-Help Center and the San Francisco Self-Help Centers

\* Due to limited space (18 attendees per session), we are requesting that only one FLF representative from each court register for this session. If the Self-Help provider is someone other than a court employee, one person from that organization may register as well. Please register in advance.

**Wednesday, May 16, 2007 at the Hyatt Embarcadero – Main Conference**

- 7:00–8:30 a.m. Breakfast/Registration
- 8:30–9:00 a.m. Opening Remarks—Self-Help Service as a Core Court Function **Grand Ballroom**
- 9:00–10:15 a.m. Plenary: Speaker Richard Zorza—Rethinking the Courts **Grand Ballroom**
- 10:15–10:30 a.m. Break
- 10:30 a.m.–Noon Team Meetings **See Chart for Locations**
- 12:00–1:30 p.m. Lunch/Speaker, Melba Beals—The Hero and Heroine in Each One of Us **Grand Ballroom**

**1:30–3:00 p.m. Workshops I**

- I A How to Help Prepare Litigants for Hearings and Trials **Pacific L/M**
- I B Providing Services to Limited-English-Speaking Litigants **Pacific F**
- I C How to Start a Self-Help Center **Pacific B/C**
- I D The Latest on Limited Scope Representation and How You Can Work With Your Bar to Encourage It **Pacific H/I**
- I E The Impact of Self-Help Centers on Caseflow Management **Pacific N/O**
- I F Helping Litigants with Mental Health Problems **Pacific J/K**
- I G Decisionmaking and Solutions for Unintended Bias **Seacliff B**

3:00–3:30 p.m. Break

**3:30–5:00 p.m. Workshops II**

- II A Distance Services - Using Hotlines, E-mail, Videoconferencing and the Web to Provide Services **Pacific N/O**
- II B How to Create Plain Language Forms and Instructions **Pacific J/K**
- II C Operation and Expansion of Self-Help Center Services **Pacific L/M**
- II D Self-Help Is Not for Everybody: Planning with Local Bars, Lawyer Referral Services and Legal Services Programs to Provide a Continuum of Service **Pacific H/I**
- II E Staffing and Personnel Issues Including Volunteers (How to Get and Retain the Right People) **Seacliff B**
- II F Getting Support Services in the Courtroom **Pacific B/C**
- II G Helping Self-Represented Litigants With Appeals **Pacific F**

**AT-A-GLANCE AGENDA**

# AT-A-GLANCE AGENDA

**Thursday, May 17, 2007 at the Hyatt Embarcadero – Main Conference**

**7:00–8:30 a.m. Breakfast**

**8:30 – 10:00 a.m. Workshops III**

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|----------------------------------------------------------------------------------------------------------------------------|--------------------|
| III A Effective Workshops                                                                                                  | <b>Pacific H/I</b> |
| III B Providing Neutral Services                                                                                           | <b>Pacific J/K</b> |
| III C Using Volunteers Effectively                                                                                         | <b>Seacliff B</b>  |
| III D Collaborations Between Self-Help Centers and Law Libraries                                                           | <b>Pacific N/O</b> |
| III E From Their First Step Into the Courthouse—Making the Courthouse Work More Effectively for Self-Represented Litigants | <b>Pacific L/M</b> |
| III F Ethical Issues for Judges in Handling Cases With Self-Represented Litigants                                          | <b>Pacific D</b>   |
| III G Triage—Getting Self-Represented Litigants to the Right Service                                                       | <b>Pacific B/C</b> |

**10:00–10:30 a.m. Break**

**10:30 a.m.–Noon Team Meetings** **See Chart for Locations**

**12:00–1:30 p.m. Lunch/Speaker, Chief Justice Ronald M. George** **Grand Ballroom**

**1:30–3:00 p.m. Workshops IV**

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|----------------------------------------------------------------------------------------------------|--------------------|
| IV A Mediation of Cases With Self-Represented Litigants                                            | <b>Pacific H/I</b> |
| IV B Effective Communication: Improving Comprehension and Compliance by Self-Represented Litigants | <b>Pacific D</b>   |
| IV C Expanding Family Law—Moving Beyond Child Support                                              | <b>Pacific B/C</b> |
| IV D Reaching Out—Outreach and Education Services in the Community—Issues and Successes            | <b>Pacific N/O</b> |
| IV E Funding—How Other Courts Have Done It                                                         | <b>Pacific J/K</b> |
| IV F Managing Pro Per Cases in the Courtroom                                                       | <b>Seacliff B</b>  |
| IV G Self-Help Assistance: Research Findings and What They Tell Us About Good Practice             | <b>Pacific L/M</b> |

**3:00–3:15 p.m. Break**

**3:15–4:00 p.m. Closing Plenary: Envisioning the Future—Serving the Needs of Modern Court Users** **Grand Ballroom**



**Friday, May 18, 2007, at the AOC — National Conference  
on Self-Represented Litigation**

<b>7:00–8:00 a.m.</b>	<b>Continental Breakfast/Registration</b>	
<b>8:00–9:00 a.m.</b>	<b>Opening Plenary—Overview and Future Directions of the National Self-Represented Litigation Network</b>	<b>Auditorium</b>
<b>Breakout sessions with National Updates and Strategy Discussions</b>		
<b>9:00–10:30 a.m.</b>	<b>National Update and Strategy Sessions</b>	
	<b>1. Judicial Education</b>	<b>Benicia</b>
	<b>2. Problem Assessment/Triage</b>	<b>Auditorium</b>
	<b>3. Unbundling/Limited Scope Representation</b>	<b>San Diego</b>
	<b>4. Research Directions</b>	<b>Monterey</b>
<b>10:30–10:45 a.m.</b>	<b>Break</b>	
<b>10:45–12:15 p.m.</b>	<b>National Updates and Strategy Sessions</b>	
	<b>1. Forms and Plain Language Development and Promotion</b>	<b>San Diego</b>
	<b>2. Case Management and Self-Represented Litigants</b>	<b>Auditorium</b>
	<b>3. Developing Strategies to Increase Compliance With Court Orders</b>	<b>Benicia</b>
	<b>4. System Change</b>	<b>Santa Barbara</b>
<b>12:15–1:30 p.m.</b>	<b>Lunch and Networking Time</b>	
<b>1:30–3:00 p.m.</b>	<b>National Update and Strategy Sessions</b>	
	<b>1. Courtroom Services</b>	<b>Benicia</b>
	<b>2. Overall Direction of the National Self-Represented Litigation Network</b>	<b>Monterey</b>
	<b>3. Partnerships and Increasing Resources</b>	<b>San Diego</b>
	<b>4. Education and Guidance for Court and Self-Help Center Staff</b>	<b>Auditorium</b>
<b>3:00 – 4:00 p.m.</b>	<b>Closing Plenary—Next Steps</b>	<b>Auditorium</b>

**AT-A-GLANCE AGENDA**

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**Monday, May 14, 2007, at the AOC**

**Welcome/DCSS Update/AOC Update**

**8:30–10:15 a.m. Auditorium**

*Welcome from Diane Nunn, CFCC Director*

*Faculty: DCSS Staff & Michael Wright*

*Audience: Family Law Facilitators Only*

**FLF Expansion Policy Overview by AOC Staff and Issues Identification Exercise by Group**

**10:30 a.m.–12:00 p.m. Auditorium**

*Faculty: Vickie Akers, Bonnie Rose Hough & Michael Wright*

*Attendees will have an opportunity to raise issues and concerns.*

*Audience: Family Law Facilitators Only*

**Guardianships**

**10:30 a.m.–12:00 p.m. San Diego**

*Faculty: Monica Mitchell*

*The law, the procedure, and a practical approach for starting a new guardianship self-help program.*

**FLF Expansion—AOC Responds (Q&A)**

**1:00–3:00 p.m. Auditorium**

*Faculty: Vickie Akers, Mark Garcia, Bonnie Rose Hough, Lee Morhar & Michael Wright*

*AOC staff will address issues and concerns identified during the morning session.*

*Audience: Family Law Facilitators Only*

**Conservatorships and Probate of Small Estates**

**1:00–3:00 p.m. San Diego**

*Faculty: Yolande Erickson & Susanne Hilles*

*This workshop will provide an orientation to probate conservatorships, a description of two functioning self-help clinics, an orientation to handling small estates after death, and practical tips for starting self-help clinics.*

**Family Law Facilitators Roundtable**

**3:30–5:00 p.m. San Diego**

*Focus primarily will be on FLF/Self-Help Expansion Practical Issues, Moodle Demonstration.*

*Audience: Family Law Facilitators Only*

**Self-Help Center and Small Claims Attorneys Roundtable**

**3:30 p.m.– 5:00 p.m. Benicia**

*Faculty: Christine Copeland, Julie Dodge, Carole Raimondi & Gloria Sanchez*

*Attorneys will have the opportunity to discuss among themselves issues they find most critical in their daily work at the courts. Topics such as staffing, supervision, administration, relationships with judges and other court staff, and specific challenges related to the special needs of certain litigants will be among the matters raised for discussion.*

**Self-Help Center Staff and Nonattorney Small Claims Advisors Roundtable**  
**3:30–5:00 p.m. Santa Barbara**

*Faculty: Joan Connelley, Gabriella Reyes & Tammy Grimm*

Paralegal and other court-based self-help center staff, and nonattorney small claims advisors will have the opportunity to discuss among themselves issues they find most critical to their daily work in the courts. Topics such as handling large numbers of litigants who may have unrealistic expectations of the program; handling emergency legal matters; the need for constantly updated materials; and relationships with attorneys, judges, and other court staff will be among the matters raised for discussion.

**Law Librarians Roundtable**

**3:30–5:00 p.m. Monterey**

*Faculty: Annette Heath & John Zorbas*

Law librarians will have the opportunity to discuss among themselves issues they find most critical to their daily work. Topics involve collaboration with the courts and court-based self-help centers and funding issues.

**Tuesday, May 15, 2007, at the AOC**

**Skills-Based Workshop: Communicating With Self-Represented Litigants**

**8:30 a.m.–5:00 p.m. Benicia**

*Faculty: Kathleen Sikora & Kelly Tait*

This skills-based course will explore elements of communication, including verbal, nonverbal, and listening skills, in the context of courtroom proceedings that involve self-represented litigants. Discussion will focus on communication strategies that strengthen the fact-finding process, enhance the litigant's perception of procedural fairness, and improve the likelihood of compliance with court orders. During the afternoon session, participants will demonstrate their communication skills, observe demonstrations by their judicial colleagues, and discuss their own demonstration privately with a communications expert through videotape playback and constructive critique.

**Developing an Evaluation Strategy for Your Self-Help Center**

**8:30 a.m.–5:00 p.m. Monterey**

*Faculty: Diana Avendaño, Robin Busch, Caron Caines, James Mensing, Diane Trunk & Wendy Vaughn*

This training will focus on designing and conducting focus groups, individual interviews, and other data collection strategies. The goal is for every program to leave the training with a detailed, workable plan for conducting their program evaluations. Participants will be provided with workbooks and materials to help them complete their plan. Evaluation experts will be available to assist in designing evaluations using focus groups, individual interviews, court case file reviews, and customer satisfaction surveys.

**Paternity and Support Case Law Update**

**8:45 a.m.–12:00 p.m. Auditorium**

*Faculty: Garrett Dailey, CFLS, AAML*

This workshop will provide an in-depth analysis of recent decisions on paternity and support.

**Consumer and Small Claims Law and Updates**

**8:45 a.m.–12:00 p.m. San Diego**

*Faculty: Albert Balingit, Judith Coker, John Lamb, Jay Sacks, Bill Tanner & Cara Vonk*  
 Program covers small claims procedure, demand letters, landlord-tenant security deposits, unlicensed contractors, little-known miscellaneous consumer statutes, delivery service practices and tips, and answers to your questions.

**California Guideline Child Support Calculator (DCSS) (Limited attendance, hands-on)\***

**8:45 a.m.–5:00 p.m. Bodega Room, 3rd Floor (4 sessions, 1½ hours each)**

*Faculty: Janet Ballou, DCSS Senior Attorney, & Mitchell Hurd, Child Support Performance Specialist*

Overview of the DCSS Child Support Calculator and opportunity for hands-on experience using various scenarios. Due to limited space (18 attendees per session), we are requesting that only one FLF representative from each court register for this session. If the self-help provider is someone other than a court employee, one person from that organization may register as well. Please register in advance.

**Law Librarians Strategizing for Partnerships**

**10:30 a.m.–3:00 p.m. Santa Barbara**

*Faculty: Charles Dyer, Marcia Koslov & Judy Meadows*

This session will provide an opportunity for law librarians to discuss how best to participate in the self-help movement with the goal of developing a white paper. A specific focus will be on how California law librarians can work with self-help centers.

**Ethics**

**1:00–3:00 p.m. Auditorium**

*Faculty: Hon. Louise Bayles-Fightmaster & Frances Harrison*

This workshop will address unique ethical issues that family law facilitators and other self-help center providers commonly encounter.

**Expungements and Traffic**

**1:00–3:00 p.m. San Diego**

*Faculty: Tina Rasnow & Joshua Stehlik*

This workshop will describe the process and forms needed for expungement of criminal records and describe how self-help centers provide this service. It will also provide basic information on traffic laws, including handouts and information on workshops offered by courts on the process of traffic court.

**Facilitator/Self-Help Expansion—Financial Impact/What Facilitators and Court Administrators Need to Know**

**3:30–5:00 p.m. Auditorium**

*Faculty: Vickie Akers, Mark Garcia, Bonnie Rose Hough & Michael Wright*

This workshop will explore funding streams, reimbursability principles, statutory mandates and structures, timekeeping and practice; role of AOC vis-a-vis the courts, etc.

**Landlord/Tenant Basics**  
**3:30–5:00 p.m. Santa Barbara**

*Faculty: Robby Stovitz*

This session will provide an overview of the basics in landlord/tenant law: determining the type of housing, landlord and tenant responsibilities, and termination of the tenancy and the eviction process.

**Knowledge Fair and Reception**  
**5:00–7:30 p.m. Great Hall**

Includes tours of the San Francisco Family Law Self-Help Center and ACCESS programs, the Santa Clara Mobile Self-Help Center, and the California Supreme Court.

**Wednesday, May 16, 2007, at the Hyatt Regency**

**Opening Remarks**  
**8:30–9:00 a.m. Grand Ballroom**

Justice Kathleen O’Leary, Chair of the Judicial Council Task Force on Self-Represented Litigants

William C. Vickrey, Administrative Director of the Courts

**Speaker, Richard Zorza—Rethinking the Courts**  
**9:00–10:15 a.m. Grand Ballroom**

A vision for courts of the future—structured from the ground up to ensure access for all, including the self-represented. What steps have we taken, where do we need to go?

**Team Meetings**  
**10:30 a.m.–12:00 p.m. See Chart for Locations**

**Lunch - Speaker Melba Beals—The Hero and Heroine in Each One of Us**  
**12:00–1:30 p.m. Grand Ballroom**

The recipient of a Congressional Gold Medal, Ms. Beals was one of the nine black students to integrate Central High in Little Rock, Arkansas, in the face of a rampaging mob of segregationists who vowed to kill her rather than allow her to attend school with their white children. She will speak about finding the inner strength to face the monumental challenge set in front of her and how all of us can be a hero or heroine.

**Workshops I**

**I A: How to Help Prepare Litigants for Hearings and Trials**  
**1:30–3:00 p.m. Pacific L/M**

*Faculty: Hon. William Palmer, Robby Stovitz & Hon. Dale Wells*

This workshop will describe how programs can help litigants prepare for hearings and trials including teaching how to introduce evidence, make offers of proof, conduct direct and cross-examination and act in the courtroom in family law, small claims and civil cases.



**I B: Providing Services to Limited-English-Speaking Litigants**

**1:30–3:00 p.m. Pacific F**

*Faculty: Diane Altamirano, Claudia Johnson & Karin Wang*

With more than 200 languages spoken in California, how can the courts ensure that legal services are accessible to limited-English-speaking litigants? Participants will learn strategies and issues for providing services to limited-English speakers in a manner that is linguistically and culturally competent, while faced with limited resources.

**I C: How to Start a Self-Help Center**

**1:30–3:00 p.m. Pacific B/C**

*Faculty: Melissa Downing, Madelynn Herman, Margaret Little & Suzanne Morlock*

When starting a new court-based self-help center, many issues must be considered. Presenters from both family law and civil court-based self-help centers will discuss how they analyzed their local litigation demographics to determine what legal matters they would cover, identified necessary stakeholders, obtained necessary funding, conducted planning, made decisions about service delivery methods, and opened their doors.

**I D: The Latest on Limited Scope Representation and How You Can Work With Your Bar to Encourage It**

**1:30–3:00 p.m. Pacific H/I**

*Faculty: M. Sue Talia & Alicia Valdez Wright*

Limited scope representation is one way to encourage attorneys to provide representation at hearings and trials, as well as in providing advice and preparation of pleadings. With comprehensive risk management manuals developed in collaboration with the State Bar, including sample fee agreements, checklists, client handouts and other materials, it is becoming easier for attorneys to provide this service appropriately and economically. A growing number of lawyer referral services are developing panels of attorneys who are willing to provide unbundled services, which can be a great referral resource for self-help programs.

**I E: The Impact of Self-Help Centers on Family Law Caseflow Management**

**1:30–3:00 p.m. Pacific N/O**

*Faculty: Diane Bras, John Greacen, Susan Groves, Frances Harrison & Hon. David Kalemkarian*

Presenters will provide examples of ways in which expanded family law facilitator and other court-based self-help programs have contributed to the overall improvement of the court’s ability to manage cases involving self-represented litigants. Completion of judgments, creation of written orders, status conferencing, and assistance to the courtroom are examples of topics to be discussed.

**I F: Helping Litigants With Mental Health Problems**

**1:30–3:00 p.m. Pacific J/K**

*Faculty: Dr. Deborah Chase & Dr. Lynn E. O’Connor*

Attorneys and staff are reporting an increasing frequency of individuals coming to court-based self-help centers with serious mental health issues that present challenges to the programs. Learn more about the nature of serious mental health conditions and the types of problems often faced by the individuals suffering from them. Get tips on how best to handle requests for help from customers whose mental health problems will prevent them from being able to self-represent, or who present problems that are not legal in nature.

**I G: Decisionmaking and Solutions for Unintended Bias**

**1:30–3:00 p.m. Seaciff B**

*Faculty: Kathleen Sikora*

This session will explore current research in the field of social cognition (the study of mental processes that give rise to social behavior) and its relevance to the courtroom. Through discussion of such concepts as social categorization and heuristics, in-group favoritism/out-group derogation, unconscious bias, and fundamental attribution error, faculty will suggest strategies for minimizing unintended bias in judicial decisionmaking.

**Workshops II**

**II A: Distance Services—Using Hotlines, E-mail, Videoconferencing and the Web to Provide Services**

**3:30–5:00 p.m. Pacific N/O**

*Faculty: Diane Bras, Kelly Browne, Tammy Grimm, Anthony Serafica & Richard Zorza*

Experienced court-based self-help center attorneys and staff discuss how to expand services using telephone, e-mail, videoconferencing, and web sites to help litigants.

**II B: How to Create Plain Language Forms and Instructions**

**3:30–5:00 p.m. Pacific J/K**

*Faculty: Maria Mindlin*

Learn how to create materials that litigants will want to read and can understand. This workshop will explain the basics of readability and provide lots of before and after examples. Bring a difficult document, and faculty will show you how to make it easier to use!

**II C: Operation and Expansion of Self-Help Center Services**

**3:30–5:00 p.m. Pacific L/M**

*Faculty: Caron Caines, Sarah Heckman & Leigh Parsons*

Presenters will cover the operation and growth process of expanded court-based self-help center programs. Ways in which these programs have been extended to provide services in caseload management and other court operations, the implementation of services in increasing numbers of court locations, and the use of the Hon. Corps program in Los Angeles will be discussed.

**II D: Self-Help Is Not for Everybody: Planning With Local Bars, Lawyer Referral Services, and Legal Services Programs to Provide a Continuum of Service**

**3:30–5:00 p.m. Pacific H/I**

*Faculty: Tiela Chalmers, Mary Lavery Flynn, Michele Morley & Carmen Ramirez*

Speakers will describe best practices for local coordinated planning efforts with the dual goal of developing support for court-based self-help centers and increasing the availability of actual legal representation where appropriate. This involves both expanding limited scope legal assistance and the level of pro bono involvement by the private bar.

**II E: Staffing and Personnel Issues, Including Volunteers (How to Get and Retain the Right People)**

**3:30–5:00 p.m. Seaciff B**

*Faculty: Susan Ledray, Margaret Little & Lollie Roberts*

One of the key challenges facing court administrators and self-help center managers is finding and keeping the right people for the job. What kinds of skills and traits should we be looking for? What training should we be offering? How can we provide ongoing supervision and support? What's the same and different about volunteers? How do you get the buy-in and participation of other court staff, including clerks?

**II F: Getting Support Services in the Courtroom**

**3:30–5:00 p.m. Pacific B/C**

*Faculty: Hon. Verna Adams, Hon. Louise Bayles-Fightmaster, Jessica Flores & Hon. Mark Juhas*

Courts are increasingly using specialized calendars for self-represented litigants as a calendar and caseload management tool. By concentrating self-help support staff in courtrooms on these pro per days, assistance is provided to both the court and the litigants. Judicial officers and support staff who currently work with pro per day calendars will provide examples and discuss how to get volunteer assistance and other support.

**II G: Helping Self-Represented Litigants with Appeals**

**3:30–5:00 p.m. Pacific F**

*Faculty: Paul Fogel, Lisa Jaskol, Laura Loberman & Hon. Maria Rivera*

Appellate courts recognize the need to provide assistance to self-represented litigants so that they may access their appellate remedies. Learn about the new self-help center in the Second Appellate District in Los Angeles, new services at the First Appellate District, and work by the Fourth Appellate District on its manual for self-represented litigants. Also learn what basic information and resources self-help center and legal services providers can provide self-represented litigants who face the need to appeal.

**Thursday, May 17, 2007, at the Hyatt Regency**

**Workshops III**

**III A: Effective Workshops**

**8:30–10:00 a.m. Pacific H/I**

*Faculty: Alice Buck, Sarah Heckman & Michelle Hopkins*

Three experienced practitioners will describe the workshops conducted at their court and then take questions from a moderator and the audience. Workshops designed to assist in dissolution and guardianship cases and workshops in Spanish will be discussed. Topics discussed will include workshop triage, the roles of volunteers and staff, and presentation methods. Everyone who conducts a workshop at their court or who is interested in starting a workshop program is encouraged to attend and join the discussion.

**III B: Providing Neutral Services**

**8:30–10:00 a.m. Pacific J/K**

*Faculty: Cherie Allison, Dr. Deborah Chase, Julie Saffren, Fariba Soroosh, Diane Trunk & Wendy Vaughn*

How have programs transitioned from serving only one side of a case to providing neutral services? What have been the challenges and the rewards? Hear from a Los Angeles domestic violence program, an Alameda landlord/tenant program, and a Santa Clara pro bono program for domestic violence that helps both respondents and petitioners find counsel.

**III C: Using Volunteers Effectively**

**8:30–10:00 a.m. Seaciff B**

*Faculty: Diane Altamirano, Kathleen Dixon, Estela Lopez & Lenor Noll*

This workshop will discuss different strategies for the effective use of volunteers in self-help centers, including student interns. It will include a discussion of the recruitment, training, and retention of volunteers. Also explored will be the use of volunteers to ensure that services are provided in a linguistically and culturally competent manner.

**III D: Collaborations Between Self-Help Centers and Law Libraries**

**8:30–10:00 a.m. Pacific N/O**

*Faculty: Kelly Browne, Renee Fleming, Annette Heath, Mary Kirby & Helen Stauts*

This panel will discuss a variety of collaborations between law libraries and court-based self-help centers to increase resources, expand space, and respond to the growing number and complexity of issues facing self-represented litigants.

**III E: From Their First Step Into the Courthouse—Making the Courthouse Work More Effectively for Self-Represented Litigants**

**8:30–10:00 a.m. Pacific L/M**

*Faculty: Jose Guillen, Susan Ledray, Michael Planet & Rona Rothenberg*

Most self-represented litigants are infrequent court users. How can we make our facilities, organization, procedures, and staff training to be as effective as possible in addressing their needs?

**III F: Ethical Issues for Judges in Handling Cases With Self-Represented Litigants**

**8:30–10:00 a.m. Pacific D**

*Faculty: John Greacen, Hon. David Kalemkarian & Hon. Laurie Zelon*

Handling cases involving self-represented litigants poses special challenges for judicial officers. This workshop will discuss the relevant canons and review the case law concerning a variety of issues about self-represented litigants, including what assistance is allowed, what limitations are placed on judicial officers, and practical techniques for dealing with recurring issues in the courtroom.

**III G: Triage—Getting People to the Right Services**

**8:30–10:00 a.m. Pacific B/C**

*Faculty: Claudia Johnson, Suzanne Morlock & Tina Rasnow*

A central issue for self-help centers and those providing brief services is trying to determine the appropriate level of service needed for particular litigants and legal matters, and identifying those issues with which litigants need additional help. In identifying which litigants can be helped without attorney representation or advice and the need for additional services, self-help centers may have to provide referrals to other legal resources, such as online, legal aid, or the private bar, or to appropriate social services resources. What techniques are programs using to identify the persons who can successfully maneuver the court procedure on their own and to identify those who need extra help, and get them to where they need to go? What solutions might technology offer? How can we train staff to do appropriate screening?

**Team Meetings**

**10:30 a.m. – 12:00 p.m. See Chart for locations**

**Lunch—Speaker Chief Justice Ronald M. George**

**12:00–1:30 p.m. Grand Ballroom**

**Workshops IV**

**IV A: Mediation of Cases with Self-Represented Litigants**

**1:30–3:00 p.m. Pacific H/I**

*Faculty: Judith Beck, Caron Caines & Brohne Lawhorne*

Helping self-represented litigants reach agreements about the issues in their cases has become part of many expanded family law facilitator and other self-help programs. Presenters will discuss the role of court-based self-help centers in the early dispute resolution of cases in family law, small claims, unlawful detainer, civil harassment, and more.

**IV B: Effective Communication: Improving Comprehension and Compliance by Self-Represented Litigants**

**1:30–3:00 p.m. Pacific D**

*Faculty: Kelly Tait*

This session will cover elements of communication as they relate to effectiveness in the courtroom and beyond. Strategies for using language clearly, strengthening nonverbal communication, and listening effectively will be discussed, including approaches for increasing litigants' compliance with court orders.

**IV C: Expanding Family Law—Moving Beyond Child Support**

**1:30–3:00 p.m. Pacific B/C**

*Faculty: Alice Buck, Jessica Flores & Lauren Zorfas*

When assistance in family law is expanded beyond the AB 1058 limitation of child support and related issues, a court-based program must carefully define its role. In this workshop, family law facilitators who have expanded their programs will discuss how they analyze and limit the assistance they offer with issues such as property and debt division, custody, spousal support, pensions, and other potentially complex issues in order to avoid giving advice or compromising the neutrality of the court. The workshop will also address how collaborations with other agencies and organizations can help maximize resources as family law services expand.

**IV D: Reaching Out—Outreach and Education Services in the Community—Issues and Successes**

**1:30–3:00 p.m. Pacific N/O**

*Faculty: Hon. William Murray, Tina Rasnow, Cathy Westlund & Hon. Erica Yew*

Providing community education is an excellent way to reach out to traditionally underserved community members—letting them know about court-based self-help resources and preventive legal assistance. Learn what creative outreach other courts have taken and what challenges these courts have had to overcome.

**IV E: Funding—How Other Courts Have Done It**

**1:30–3:00 p.m. Pacific J/K**

*Faculty: Lorna Choy, Neal Dudovitz, Bonnie Rose Hough, Leslie Hatamiya, Janice Munsterman & Martha Wright*

Learn about the various county, court, and legal aid partnerships in obtaining funding to serve self-represented litigants. Panelists representing the State Justice Institute, California Bar Foundation, the Legal Services Trust Fund Commission, and the Administrative Office of the Courts will discuss creative strategies and approaches in leveraging community, county, and private foundation funding.

**IV F: Managing Pro Per Cases in the Courtroom**

**1:30–3:00 p.m. Seacliff B**

*Faculty: Hon. Steve Austin, Hon. Mark Juhas & Hon. Dale Wells*

Managing calendars in which there are high percentages of cases involving self-represented litigants can present challenges for judicial officers and court staff. Examples such as what questions to ask litigants on the record, how to handle a variety of evidentiary issues, and how to keep the calendar moving will be among the issues discussed by this panel.

**IV G: Self-Help Assistance: Research Findings and What They Tell Us About Good Practice**

**1:30–3:00 p.m. Pacific L/M**

*Faculty: John Greacen, James Mensing, Deana Piazza & Diane Trunk*

This session will review several recent evaluation efforts that have looked at the effectiveness of self-help services. In addition to presenting data about what we have learned, the presenters will focus on what the data mean for those who provide assistance to self-represented litigants.

**Closing Plenary—Envisioning the Future—Meeting the Needs of Modern Court Users**

**3:15–4:00 Grand Ballroom A**

*Hon. Laurie Zelon*

**Friday, May 18, 2007, at the AOC**

**Opening Plenary—Overview and Future Directions of the National Self-Represented Litigation Network**

**8:00–9:00 a.m. Auditorium**

*Faculty: Richard Zorza*

“Continuum of Service” is the idea that the access system must be built with a wide variety of capacities to meet the needs of varied populations, cases, and situations. In this plenary, national leaders will explore what it will take to build such a system.

**National Update and Strategy Sessions**

**Judicial Education**

**9:00–10:30 a.m. Benicia**

*Faculty: Hon. Laurie Zelon & Richard Zorza*

This year has already seen a very significant change in the ABA Model Code of Judicial Conduct with respect to the role of judges in self-represented litigation. This session will help lay the groundwork for the strategy to move this change into state codes, as well as for the National Judicial Conference on Self-Represented Litigation, planned for November 2007 to promote the national curriculum and education on the issue for all judges. The November conference will focus on the judge’s role in (1) making the courtroom work for the self-represented; (2) leading efforts to provide access to justice for the self-represented; and (3) planning, supporting, and providing education to other judges on self-represented litigation issues.

**Problem Assessment/Triage**

**9:00–10:30 a.m. Auditorium**

*Faculty: Susan Ledray, Stacey Marz & Suzanne Clark Morlock*

There is increasing realization that a cookie-cutter approach to services for the self-represented fails to help appropriately and is not cost effective. The process of identifying who needs what services and of making sure that effective and successful services are provided and referrals are made is complex. Much work remains to be done to develop protocols and technology that help perform this function. This session will help design the front end of the system.

**Unbundling/Limited Scope Representation**

**9:00–10:30 a.m. San Diego**

*Faculty: M. Sue Talia*

Access to justice for the self-represented requires enthusiastic participation from the private bar. Such participation will require dramatic increases in discrete task assistance (unbundling), pro bono, and contracted assistance in various forms. Attorneys’ ethical and economic concerns must be effectively addressed to encourage their participation. This session will review strategies and plan next steps in the collaborations and innovations required to fully integrate this critical component, including techniques to address various stakeholder groups, such as traditional bar leadership, rank-and-file members, and the removal of real or perceived impediments to greater involvement by the private bar.

**WORKSHOP DESCRIPTIONS**

**Research Directions**

**9:00–10:30 a.m. Monterey**

*Faculty: John Greacen*

The self-represented litigation innovation agenda requires far more information about the needs of the self-represented, the barriers they face, how to build a receptive court environment, and what services actually work. This year has seen important research into judicial communication with self-represented litigants, and the planning of research into (a) the relationship between what happens in the courtroom and ultimate compliance, and (b) barriers to service of process. This session will engage innovators in these and other projects, discuss their implications and assist in planning, and facilitate the development of future research partnerships.

**Forms and Plain Language Development and Promotion**

**10:45 a.m.–12:15 p.m. San Diego**

*Faculty: Harry Jacobs, Liz Keith & Glenn Rawdon*

Those states that have standardized forms find them a critical tool for access to justice. Yet advocates in those states that do not have such forms find significant resistance. Even states with forms need to improve their design and usability, and all states still have much to do to integrate technology and individualized support into the forms completion process for litigants. This session will plan additional outreach, training, skills development, and advocacy on this topic, including a train-the-trainer session.

**Case Management and Self-Represented Litigants**

**10:45 a.m.–12:15 p.m. Auditorium**

*Faculty: John Greacen*

Court managers are finding that the tools of case-specific case management—identifying what is needed to keep particular types of cases moving to appropriate resolution—apply with great force to cases involving self-represented litigants. This session will discuss how to promote and share the most effective of these innovations.

**Developing Strategies to Increase Compliance With Court Orders**

**10:45 a.m.–12:15 p.m. Benicia**

*Faculty: Tina Rasnow & Jodi Prior*

There is agreement that self-represented litigation innovators have been less engaged in this area of innovation than perhaps any other. However, the process of identifying possible best practices has begun, and this session will brainstorm innovations and experiments and help build the network of support for these innovations.

**System Change**

**10:45 a.m.– 12:15 p.m. Santa Barbara**

*Faculty: Jeanne Charn*

This session will discuss the broader movement to change the system so that court processes are simpler to understand and access, the players work together better to serve all constituencies, and the argument for transformation is best made.



**Courtroom Services**

**1:30–3:00 p.m. Benicia**

*Faculty: Hon. Louise Bayles-Fightmaster, Dr. Deborah Chase, Kathleen Dixon, Carole Raimondi & Lollie Roberts*

Services in the courtroom itself—including assistance in the preparation of orders, immediate production of printed orders, systems of screening and referral—are a critical component of providing access. This session will explore how to spread the word about these innovations and how to design and test the next round of such innovations.

**Overall Direction of the National Self-Represented Litigation Network**

**1:30–3:00 p.m. Monterey**

*Faculty: Richard Zorza*

In one year the Self-Represented Litigation Network (SRLN) has produced a wide variety of tools for innovators, deepened the discussion, and effectively reached out to national networks such as the Conference of Chief Justices and the network of Access to Justice Commissions. SRLN now needs to adjust its ways of working to take full advantage of these achievements and to give it long-term stability and effectiveness. This session’s goal is to strategize these changes.

**Partnerships and Increasing Resources**

**1:30–3:00 p.m. San Diego**

*Faculty: Bonnie Rose Hough, Susan Kaufman, Judy Meadows & Glenn Rawdon*

Funding for self-represented litigation innovation in many states remains difficult to obtain. Building on a research review of potential federal resources, this session will discuss how to make the case for resources at all levels of government and from other partners.

**Education and Guidance for Court and Self-Help Center Staff**

**1:30–3:00 p.m. Auditorium**

*Faculty: Susan Ledray, Stacey Marz & Tina Rasnow*

The increasing complexity and range of self-help services is drawing attention to the subtlety of what is appropriate court and self-help center engagement with litigants. As this engagement becomes more varied, the need for more context-specific analysis of what forms of engagement are fully consistent with court neutrality is also becoming clearer. This session will lay the groundwork for developing and sharing this new analysis.

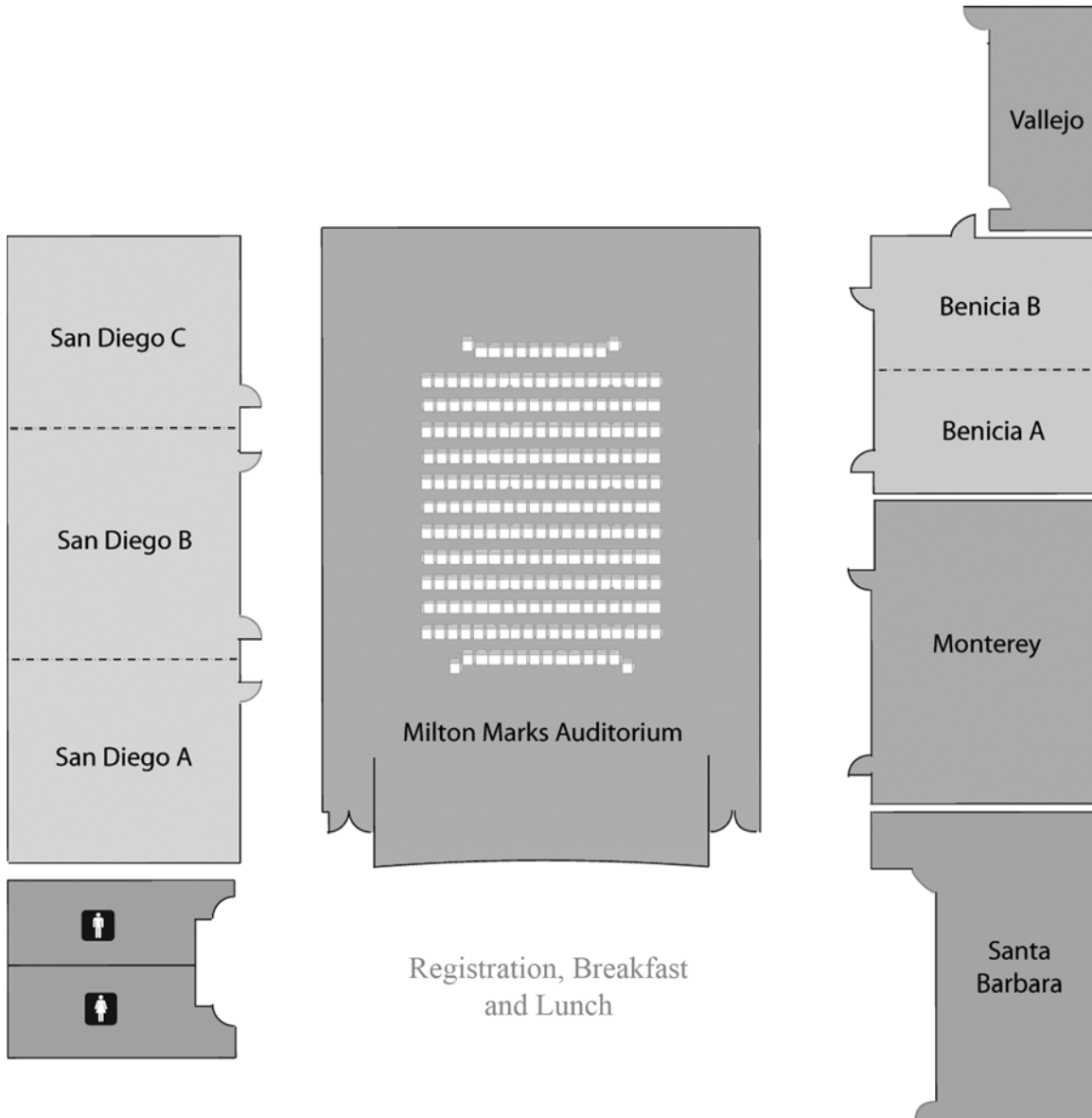
**Closing Plenary—Next Steps**

**3:00–4:00 p.m. Auditorium**

*Faculty: Bonnie Rose Hough, Susan Ledray, Judy Meadows, Diane Nunn, Wayne Moore, M. Sue Talia & Hon. Laurie Zelon*

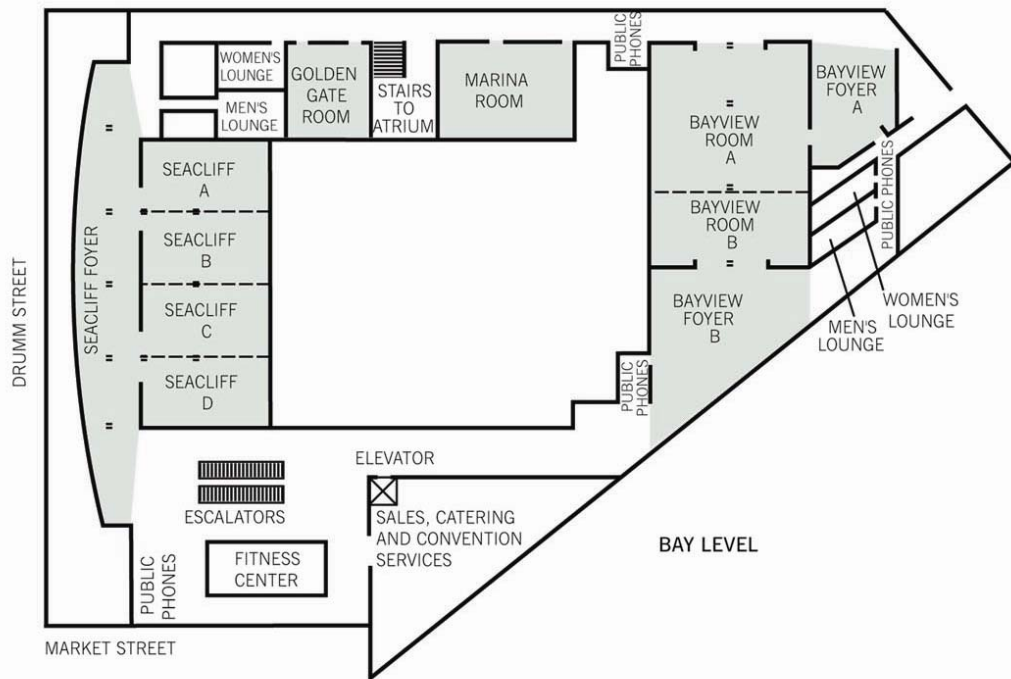
The Continuum of Service is the idea that the access system must be built with a wide variety of capacities to meet the needs of varied populations, varied cases, and varied situations. In this plenary national leaders will explore what it will take to build such a system.

Milton Marks Conference Center  
Administrative Office of the Courts  
455 Golden Gate Avenue/350 McAllister Street  
San Francisco, CA 94102



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