

2009 SELF-REPRESENTED LITIGANTS CONFERENCE

PROGRAM AGENDA

THURSDAY, MAY 21

9:00–10:00 **Registration and Networking / Continental Breakfast**

10:00–12:00 **Where Are We Going? State and National Perspectives on Self-Help**
(Auditorium)

In 1999, the first National Conference on Self-Represented Litigants was held in Arizona and planning efforts first began on a state and federal level. What have we achieved on a statewide level and, what is happening on a federal level? Where are we headed in the next 10 years?

Justice Kathleen O’Leary, Chair, Task Force on Self-Represented Litigants
Richard Zorza, Director, Self-Represented Litigation Network
Bonnie Rose Hough, Managing Attorney, Administrative Office of the Courts

12:00–1:00 **Lunch**

1:00–2:30 **Workshop Session 1**

1 A **The Safe At Home Program and DV Update** *(San Diego Room)*

The Safe At Home Program offered by the Secretary of State allows victims of domestic violence to have a safe mailing address. Learn about the requirements of the program and how to work with community partners to make this resource available. This program will also review the new and proposed changes to domestic violence forms, rules and procedures.

Betty Lazo, Program Specialist, Secretary of State Office
Tamara Abrams, Senior Attorney, Administrative Office of the Courts

1 B **Effective Accommodations For Self Represented Litigants With Disabilities**
(Santa Barbara Room)

Find out about the laws, including the Americans With Disabilities Act (ADA), which require courts to make reasonable accommodations for litigants with disabilities. This workshop will help you to understand the different accommodation ideas for how to most effectively assist litigants; how to address requests under California Rule of Court 1.100 and form MC-410; and use proper disability terminology when speaking to or

about someone with a disability. You will also learn about the current status of the law regarding service and comfort animals and discuss how to balance competing concerns in meeting the needs of litigants. This workshop qualifies for MCLE: one hour Elimination of Bias In the Legal Profession.

Linda McCulloh, Senior Attorney, Administrative Office of the Courts

1 C Research on Cost-Effectiveness of Self-Help Services – Building the Case for Funding
(Benicia Room)

This workshop will discuss preliminary results of research conducted by courts in the San Joaquin Regional Pro Per collaborative on the cost-effectiveness of self-help services. Data collection tools and methodology will be reviewed to enable other courts to test other services or use the findings to support increased funding for self-help services.

John Greacen, Court Consultant, Greacen Associates

1 D The Future of Family Law – Elkins Task Force Update (Monterey Room)

This interactive session will allow conference participants to get an update on the Elkins Family Law Task Force and share their ideas with members of the Task Force. The Elkins Family Law Task Force is charged with conducting a comprehensive review of family law proceedings and recommending proposals to the Judicial Council of California that will increase access to justice, ensure due process and provide for more effective and consistent rules, policies and procedures. Participants will be asked to identify key issues where the litigants they serve have difficulty and suggest potential solutions to those challenges.

Julie Dodge, Managing Self-Help Attorney and Family Law Facilitator, Superior Court of Stanislaus County

Ana Maria Garcia, Self-Help Supervising Attorney, Neighborhood Legal Services, Los Angeles

Judy Louie, Director, ACCESS Center, San Francisco

Suzanne Clark Morlock, Family Law Facilitator and Self-Help Attorney, Tuolumne County

Caron Smith, Family Law Case Coordinator Attorney, Superior Court of Ventura County

1 E Online Resources for Litigants (*Bodega B Computer Room*)

Three KLEPS award-winning programs provide information about online resources available to litigants including a new program that allows litigants to make appointments at the self-help center in Monterey. You will also hear about resources available to litigants from the California Courts Online Self-Help Center, LawHelpCalifornia, and ForeclosureInfoCA.org. Easy steps you can take to help litigants using the Internet and your court's web site will also be discussed.

Harry Jacobs, Senior Attorney, Administrative Office of the Courts

Tim Benton, Chief Information Officer, Superior Court of San Mateo County

Bill Tanner, Directing Attorney, Legal Aid Society of Orange County

Lenor McLaughlin, Director of Court Operations – Civil, Family Law and Small Claims, Superior Court of Monterey County

1 F Landlord/Tenant Basics (*Auditorium*)

This workshop 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 eviction process. It will focus on ways that self-help centers can assist litigants and identify topics where a referral for representation is appropriate.

Misty Abdelmagied, Staff Attorney, Neighborhood Legal Services

2:30–3:30 Planning Sessions with Discussion Leaders

- A. Law Librarians – Larry Meyers** (*Santa Barbara Room*)
- B. Using Technology - Harry Jacobs** (*San Diego Room A*)
- C. Small Claims Advisors - Albert Balingit** (*Auditorium Stage*)
- D. Court Administrators - John Greacen** (*Benicia Room*)
- E. Appellate Strategies – How to Provide Information - Lisa Jaskol** (*San Diego Room B*)
- F. Language and Limited English Proficiency – Mark Garcia** (*San Diego Room C*)
- G. Family Law – Deborah Chase** (*Monterey Room*)
- H. Rural Programs – Mary Flynn** (*Auditorium, right of stage*)
- I. National Strategies – Richard Zorza** (*Auditorium, left of stage*)

3:30–5:00

Workshop Session 2

2 A How to Provide Great Services by Telephone and Internet Without Going Crazy
(*San Diego Room*)

Three experienced self-help center managers will discuss their use of the telephone, web cams, WebEx, Email, and the Internet to provide “distance services” to litigants. The panelists will discuss how distance services have saved their programs time and money and they’ll discuss how to establish a distance services program at your court. The panelists will discuss the pitfalls they have faced and overcome in providing these services.

Diane Bras, Family Law Facilitator, Superior Court of Placer County

Carla Khal, Family Law Facilitator / Managing Self-Help Attorney, Superior Court of Tulare County

Suzanne Clark Morlock, Member, Task Force on Self-Represented Litigants

2 B Plain Language Writing – Basic (*Santa Barbara Room*)

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 to help explain the concepts of plain language writing.

Maria Mindlin, Language Specialist, Transcend

2 C How to Use the New Toolkit of Self-Help Evaluation Resources (*Benicia Room*)

A new toolkit of resources has been created to allow courts to evaluate the effectiveness of their services to self-represented litigants. Tools include customer surveys and focus groups as well as a tour guide to assess how easy it is for self-represented litigants to find needed information at the courthouse. Learn how to use these tools to identify areas to improve all aspects of your court for the public.

John Greacen, Court Consultant, Greacen Associates

2 D Marshalling Resources to Get the Case Finished – Self-Represented Persons Calendars
(Monterey Room)

Courts are increasingly using specialized family law calendars for self-represented litigants to assist in caseflow management. Two models will be discussed where self-help staff and volunteers are coordinated to ensure that court time is used as effectively as possible for judicial officers and the litigants. Find out how these models can be implemented using volunteers including attorneys, law students and student interpreters to work together to assist self-represented litigants to resolve contested cases.

Hon. Susan Bernardini, Judge, Superior Court of Santa Clara County
Maria Livingston, Self-Help Attorney, Superior Court of Orange County
Hon. Thomas Schulte, Commissioner, Superior Court of Orange County
Fariba Soroosh, Supervising Attorney, Superior Court of Santa Clara County

2 E Advanced PowerPoint – Beyond Bullets *(Bodega B Computer Room)*

This class will focus on a new approach to PowerPoint slides; using images and non-hierarchical arrangements of text (i.e., no bullet lists) to create memorable presentations that better engage and connect with the audience. You will learn how to create visually oriented PowerPoint slides, insert images, text boxes and autoshapes into slides, utilize PowerPoint's custom animation features and add video and audio to presentations.

Eddie Davis, Senior Education Specialist, Administrative Office of the Courts

2 F Using Videoconferencing to Provide Services – Making it Work *(Auditorium)*

The use of video conferencing at 3 different courts will be discussed. Each court's representative will discuss the benefits of videoconferencing, the difficulties they faced, and how they overcame those difficulties. An AOC staff member involved in the construction of new courthouses will discuss the video conferencing standards that have developed for self-help centers. She will also discuss how your court can get involved in the construction process so that you can ensure that the new courthouse works for your program.

Sherna Deamer, Virtual Self-Help Center Manager, Superior Court of Contra Costa County
Tammi Grimm, Court Program Manager, Self Help Assistance and Referral Program
Monica Mitchell, Supervising Attorney of Self-Help Services, Superior Court of San Bernardino County
Jennifer Willard, Supervising AV Video Systems Technical Analyst, Administrative Office of the Courts

5:00–6:30 Reception and Networking

FRIDAY, MAY 22

7:30–8:30 **Continental Breakfast and Networking**

8:30 – 10:00 **Workshop Session 3**

3 A **Mediation and Beyond – Settlement Strategies for Self-Represented Litigants**
(Monterey Room)

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. It is important to realize that there are civil rules and statutes regarding mediation processes. This workshop will describe program models that provide information to litigants prior to mediation, as well as to other settlement strategies that may be effective for self-represented litigants. It will also discuss how to work effectively with your local Dispute Resolution Programs Act (DRPA) programs to make referrals to community based mediation services.

Jacquelyn Brown, Family Law Facilitator and Self-Help Attorney, Superior Court of San Mateo County

Monica Rands-Preuss, Family Law ADR Coordinator, Superior Court of San Mateo County

Catherine Ward, Mediator/ADR Program Coordinator, Superior Court of Lake and Mendocino Counties, Director of RECOURSE Mediation Services

Lauren Zorfas, Family Law Facilitator, Superior Court of San Mateo County

3 B **Plain Language Writing – Advanced** *(Santa Barbara Room)*

Participants will use the principles of plain language writing to work on actual examples of Judicial Council forms and other documents. Experience trying to explain complicated concepts and get critical information that litigants need to provide to the court. See the difference that plain language principles can make in a document.

Maria Mindlin, Language Specialist, Transcend

3 C **Effective Judicial Communication with Self-Represented Litigants – What the Research Shows** *(San Diego Room A)*

This workshop will describe the results of recent research on how judges and self-represented litigants communicate with each other – and what strategies appear to be most effective for judicial officers to get the information they need and convey orders. The ramifications for preparing self-represented litigants for hearings will be discussed, as will ways to share this information on these findings with judicial officers.

John Greacen, Court Consultant, Greacen Associates

3 D Training and Using Volunteers Effectively (*San Diego Room B/C*)

Volunteers are an important tool to consider in providing services to self-represented litigants – and there may be more opportunities to recruit volunteers given the difficult economy. What should you look for in a volunteer? What training is required – and how can you offer that as quickly and effectively as possible using existing resources? What supervision and review is necessary and how do you provide support and guidance to your volunteers? This workshop will help you identify the wide pool of potential volunteers and discuss special training and supervision needs. It will also provide specific tips for saying “thank you!”

Maggie Cimino, Special Consultant, Administrative Office of the Courts

Jennifer Kalish, Director, JusticeCorps, Superior Court of Los Angeles County

Rheeah Keuscher, Supervising Attorney, Central Resource Center for Self-Represented Litigants, Superior Court of Los Angeles County

Tina Rasnow, Emeritus Attorney, Ventura County Bar Association’s Volunteer Legal Services Program

3 E Self-Help Center Data and Programmatic Reports (*Bodega B Computer Room*)

This workshop will demonstrate how AOC staff members review the Phoenix Financial Reports to determine appropriateness of expenditures – and provide tips on how to avoid any questions regarding those reports. It will discuss what type of narrative information is needed from the programs and how that information is used. We will discuss next steps in developing consistent data about numbers served in the wide variety of self-help programs and get feedback from participants on data collection efforts.

Mark Garcia, Senior Court Services Analyst, Administrative Office of the Courts

Bonnie Rose Hough, Managing Attorney, Administrative Office of the Courts

3 F Innovative Ways to Use the Internet to Help Litigants (*Auditorium*)

This workshop will review a wide variety of free resources on the web that you can use to help the litigants you serve as well as the staff and volunteers that you work with. It will also start a discussion about what may be possible in the future from Wikis for staff sharing, e-mail updates from the court, youtube videos, Facebook, Livechat and audio guides.

Leigh Parsons, Supervising Attorney, Self Help Center/Family Law Facilitator’s Office, Superior Court of Santa Clara County

Gloria Sanchez, Small Claims/Civil Advisor, Superior Court of Contra Costa County

Dave Scroggins, Information Technology Analyst, Superior Court of San Mateo County

10–10:30

Break

10:30–12

Workshop Session 4

4 A Ethics for Self-Help Center Attorneys and Staff (*San Diego Room*)

Using the Rules of Professional Conduct and Guidelines for Operation of Self-Help Centers, this workshop will review the basic rules regarding providing court-based self-help assistance.

Toby Rothschild, General Counsel, Legal Aid Foundation of Los Angeles

4 B Plain Language Writing – Advanced (continued) (*Santa Barbara Room*)

This continuation of the plain language workshop will provide more hands-on experience of drafting and review to participants. Participants will use the principles of plain language writing to work on actual examples of Judicial Council forms and other documents. Experience trying to explain complicated concepts and get critical information that litigants need to provide to the court. See the difference that plain language principles can make in a document.

Maria Mindlin, Language Specialist, Transcend

4 C Small Claims and Collections (*Benicia Room*)

This workshop will review basics of small claims actions and discuss the wide variety of collection strategies that can be used by self-represented litigants who win their small claims case. Participants will be better able to identify appropriate collection options and help explain them more effectively to self-represented litigants.

Albert Balingit, Staff Attorney, Department of Consumer Affairs
Bill Tanner, Directing Attorney, Legal Aid Society of Orange County

4 D Finding Funding for Self-Help Services (*Monterey Room*)

Foundation and AOC grants staff will review opportunities for funding at the national, state and local levels. Panelists will discuss foundations that have a history of funding self-help programs and identify strategies for developing partnerships that are more likely to obtain funding. Ways to identify new federal funding streams will be presented.

Stephanie Choy, Managing Director, Legal Services Trust Fund, State Bar of California
Jasmine Guillory, Program Director, California Bar Foundation
Bonnie Rose Hough, Managing Attorney, Administrative Office of the Courts
Martha Wright, Development Consultant, Administrative Office of the Courts

4 E Using Moodle – a Free Program to Develop Trainings and Share Information
(*Bodega B Computer Room*)

Learn to create an effective, online learning community. Moodle is a software application that allows you to quickly and easily create and participate in online courses, meetings, and other activities that involve learning, information sharing, and collaboration. Your site and information is available anywhere, anytime via the Internet. In this workshop you will become familiar with the most commonly used Moodle functions and design a basic online meeting or course site. As a result of this course you will be able to: create a new Moodle site; upload electronic documents and images to the site and design an instant poll.

Eddie Davis, Senior Education Specialist, Administrative Office of the Courts

4 F Working with Litigants with Mental Disabilities (*Auditorium*)

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

Hon. Steve Austin, Judge, Superior Court of Contra Costa County

Tina Rasnow, Emeritus Attorney, Ventura County Bar Association's Volunteer Legal Services Program

12:00–1:30 Lunch and Planning Sessions with Discussion Leaders

- A. Law Librarians – Larry Meyers** (*Santa Barbara Room*)
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- I. National Strategies – Richard Zorza** (*Auditorium, left of stage*)

1:30–3:00

Workshop Session 5

5 A Ethics for Self-Help Attorneys and Staff – Working Through the Issues (continued)
(San Diego Room)

This workshop is a continuation from the morning’s presentation on ethics and will involve walking through specific examples of ethical challenges from self-help centers.

Participants will identify the ethical challenges, review what written guidance is available and have the opportunity to talk with each other as well as the instructor about ways to resolve those challenges.

Toby Rothschild, General Counsel, Legal Aid Foundation of Los Angeles

5 B The New Fee Waiver Law, Forms and Rules – What happens on July 1?
(Auditorium)

On July 1, 2009, **all** fee waiver forms and rules will change to comply with AB 2448 (Feuer) which was enacted in 2008. Many of these procedures will involve a significant change in practice, particularly for family law matters. The forms, rules and rationale for the changes will be reviewed and sample instructional forms will be provided.

Anne Ronan, Attorney, Administrative Office of the Courts

Gabrielle Selden, Attorney, Administrative Office of the Courts

5 C Effective and Innovative Uses of Technology in Self-Help Workshops and Clinics
(Benicia Room)

Technology can be used to conduct workshops and clinics to provide legal services more quickly, more efficiently, and at a consistently high quality. The NPADO/HotDocs programs used at Los Angeles Court workshops and clinics will be discussed, as will technology that allows attorneys at remote locations to supervise clinics and review pleadings prepared at multiple distant locations. The ICAN! Programs used at the Orange County Court in clinics will also be discussed. Anyone conducting workshops or clinics is encouraged to attend.

Harry Jacobs, Senior Attorney, Administrative Office of the Courts

Michelle Hopkins, Family Law Staff Attorney, Superior Court of Los Angeles County

Bill Tanner, Directing Attorney, Legal Aid Society of Orange County

5 D Practical Strategies for Working with People who have Substance Abuse Issues
(Monterey Room)

Handling cases of self-represented litigants dealing with alcohol and other substance abuse issues is a frequent matter for court-based self-help centers. This workshop will help you gain an understanding of the basics of addiction and differences between substances that litigants may be using. Participants will be asked to identify concerns that they face in working with substance abusing litigants and practical strategies to address those concerns will be discussed.

Jane Pfeifer, Court consultant on substance abuse issues

5 E Using the New Free Online Child Support Calculator from DCSS
(Bodega B Computer Room)

This hands-on course will provide an overview of the features of the new online child support program developed by the Department of Child Support Services which is now mandatory in all Title IV-D child support cases – and likely to be used in a growing number of family law cases. Attendees will learn how to run calculations themselves through hypotheticals specifically designed to show the functionalities of the program.

Hon. Rebecca Wightman, Commissioner, Superior Court of San Francisco County

5 F Conservatorships and Elder Abuse (Santa Barbara Room)

This workshop will provide an orientation to providing self-help services in conservatorship and elder abuse cases and help participants understand the circumstances when they would be used. Outreach strategies to let the community know about the availability of these resources will be discussed and practical tips for providing this assistance as part of a self-help program will be provided.

Yolande Erickson, Conservatorship Attorney, Bet Tzedek Legal Services

Bertha Sanchez, Probate Litigation Paralegal, Bet Tzedek Legal Services Elder Law Unit

3:00–3:30 Next Steps to Expand Self-Help Services (Auditorium)

Take the knowledge, contacts, ideas and tools from the conference back to your court to continue to improve your programs. Remember – a crisis is a terrible thing to waste!

John Greacen, Court Consultant, Greacen Associates

Bonnie Rose Hough, Managing Attorney, Administrative Office of the Courts

Richard Zorza, Director, Self-Represented Litigation Network