

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

***Introduction:***

This Action Plan is the product of the Fresno Superior Court. A committee comprised of court and community members, including representatives from the Fresno County Bar Association, worked with a planning consultant to develop this Action Plan (see Appendix B for Committee Membership). The Court wishes to acknowledge the contribution of everyone who contributed to this plan, and the Court looks forward to continuing its collaboration with the community to fully achieve the desired results: *more informed court users who have ready access to justice services.*

**1. *Description of Need:***

The Superior Court of California, County of Fresno is committed to providing access to justice for all the people it serves. According to the 2000 Census, Fresno County experienced a rapid growth in population over the past ten years making it the 10<sup>th</sup> largest county in California; up from 12<sup>th</sup> position in 1990. Compared to California's population increase of 13.8 percent, Fresno experienced a 19.8 percent rise over 1990, bringing the total population to 799,407. Even more noteworthy is that Fresno County has experienced a 48.6 percent growth in the Hispanic population since 1990. In terms of total population, Hispanics now comprise 44 percent of the total, and there seems to be no indication of a slow down, particularly in the outlying farming communities where there are concentrated pockets of 65 to 98 percent Spanish speaking residents.

Unfortunately, the growth encountered over the past ten years is offset by the following dismal economic trends:

- Chronic double-digit unemployment: average rate of 13.7 percent.
- High school dropout rate of 36 percent.
- Only 18 percent of Fresno's workforce possesses a four-year college degree.
- 32 percent of the residents are under the age of 18.
- 38 percent of Fresno's children are poor.
- Average income is 20 percent lower when compared to the rest of California.

Adding to these facts is the unflattering news that 26 percent of the county's population is living at or below the poverty line. Naturally, these factors have a trickle down effect on the local court system; specifically, for those that cannot afford to hire an attorney.

**a. *Improve public respect, trust and confidence by improving the quality of the litigation process.***

The quality and timeliness of dispute resolution directly impacts public opinions about the judicial system. To promote a positive perception of the judicial system, the judicial branch must be responsive to emerging issues, trends, and changes within our communities. One way the judicial system can encourage public trust and confidence is by supporting programs and practices that resolve disputes in a timely and economically efficient manner.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**b. Rising caseloads require maximizing the use of judicial resources.**

In terms of pro per filings, Fresno County continues to increase each year. Figures for the previous year's filings are as follows: Civil Unlimited (21%), Civil Limited Unlawful Detainers (49%), Small Claims Appeals (57%), Family Law Dissolution's (80%), and Probate/Guardianship (66%); Guardianship pro per cases alone increased 33 percent over the previous year. Because the trend is increasing, rather than decreasing, we must look to a more proactive and long-term approach to assist self-represented litigants.

**c. Growth rate of self-represented litigants is increasing**

Results from a recent survey conducted among court staff from various departments, that work both in and outside of the courtroom indicate the following:

Profile of Survey Respondents:

Years with the court:

- 5 + years - 54 percent
- 2-5 years - 33 percent
- 0-2 years - 13 percent

**Needs of the Self-Represented Litigant**

When asked if respondents had seen an increase in the number of self-represented litigants accessing the court system, 58 percent said yes, while 42 percent said no. The survey results did not identify any one specific department; instead responses were split fairly even across all departments.

Not unexpected, staff rated the most common requests they receive from self-represented litigants as:

- Legal Information.
  - Appropriate Forms.
  - Forms Assistance.
- > All tied as the number 1 request
- Secondary, staff found that self-represented litigants needed Logistic Information such as courtroom locations and hearing times. The least requested information was Attorney Referral.

From the court staff's perspective, obstacles they believe self-represented litigants encounter outside of the courtroom include:

- Need for legal assistance.
- Waiting too long.
- Not understanding court policies and/or court orders.

Not surprising the primary obstacle encountered inside the courtroom center around the litigants understanding of court policies and/or court orders.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

When court staff were asked what services in terms of frequency, they felt the self-represented litigant needed, results indicated the following:

- SRL do not understand required procedures.
- SRL need help with completing forms.
- SRL need Spanish interpreters.
- SRL are unprepared when they come to court.
- A small number need Hmong interpreters.

Finally, when asked which services the staff felt the court should offer self-represented parties the following was revealed:

- Technology (web-based) assistance.
- Phone/Technology assistance.
- Document review and assistance (help/information desk).
- Simplify procedures and forms.
- Information packets/brochures with glossary of terms.

**Staff Training**

Key to assisting the public, particularly those who represent themselves, is knowledge about programs and services that the court offers. The survey included a list with a significant amount of court programs and services that the court provides for self-represented litigants such as the Family Law Facilitators Office, the Mobile Access Project unit, website services, and DMV Quick Pay Windows. In addition, there was an extensive list of brochures currently available for self-represented litigants. Results indicate that 71 percent of respondents were unfamiliar with these services; a strong indication that further staff training in this area is needed.

While court staff are required to furnish accurate and timely information to court users in a competent manner, they must also avoid giving legal advice. One of the survey questions explored this area. Results show that 63 percent are confident that they understand how much assistance they can give a self-represented customer; while 37 percent stated that they either did not know, or would like additional training in this area.

Reinforcing both of these points was the response to another question in the survey as to the types of education/training the court should provide staff. Two replies stood out:

- Available services for self-represented litigants.
- Legal Advice: What to say – What to do.

Further probing indicates that 33 percent of the court staff responding to the survey indicated they received training in the court's rules, policies and instructions through a combination of verbal and written policies; 25 percent received training through written and on-the-job training; followed by 17 percent stating their training was through a written policy manual only.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

***Program Areas:***

Fresno is well on its way to implementing much of its Action Plan. To provide a comprehensive picture of the totality of its efforts, however, all aspects of its efforts to address the needs of self-represented litigants, including those currently underway, are included in this Action Plan. The five Program Areas or action areas the court has identified include:

1. *Centro de Recursos Legales*: Spanish Self Help Center (One of five AOC grant funded model programs)
2. Mobile Access Project (MAP)
3. Staff Training
4. Technology
5. Unbundling of Legal Services

**2. *Program Action Plans:***

**a.1. Program Description: *Centro de Recursos Legales*: Spanish Self-Help Center**

As described above, Fresno County has an extremely high percentage of Spanish speaking residents. With this in mind, Fresno Superior Court applied for and received grant funding to develop and implement a Spanish Self-Help Education and Information Center named *Centro de Recursos Legales*, which is located adjacent to the court's Family Law Facilitators Office. The description of the elements of the Self-Help Center is available in greater detail in the grant application provided to the Judicial Council March 1, 2002. Included in this document is a general overview of the Action Plan for development and implementation of the Spanish Self-Help Center.

**Population To Be Served:**

The self-represented Spanish litigant is confronted with a lack of understanding of court procedures, as well as the inability to communicate effectively with court staff. Of these obstacles, language barrier is the most dominant hindrance to justice.

In a report published by Scott Houser, Ph.D., research associate at the Institute for Research on Poverty and a consultant to the US Bureau of the Census, it indicated that Fresno had undergone tremendous population growth in terms of the Hispanic population between 1990 and 2000, which now comprise 44 percent of the total population in the County. What is extraordinary is the rate at which the Hispanic population grew, a significant 48.6 percent, while non-Hispanic whites declined for the same period. Even more significant is the ethnicity breakdown in the rural communities within Fresno County where, depending on the city, 65 to 98 percent of the population are Hispanic. Consistent with these figures is data from Dr. Houser's report that shows 75 percent of 18-64 year olds who speak a language other than English, speak Spanish in the home.

These statistics clearly demonstrated there was a large Spanish population whose access to the court system was hindered by a language barrier. Therefore we proposed a model that would break through the barrier by offering educational information and language assistance to the Spanish pro per litigant by means of developing simple self-help instructions for court forms in

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

Spanish. In addition, we proposed the development of a *Spanish Community Volunteer Interpreter Bureau* that would provide Spanish pro per litigants with interpreters in civil cases.

**Types of Services To Be Offered:**

The Centro de Recursos Legales provides pro per litigants with education and access to the court in an efficient and effective manner by offering the following services:

- Access to Spanish language simple self-help instructions either from our website or at the Center.
- Interpreter assistance provided through a *Spanish Community Volunteer Interpreter Bureau*.
- Review of court documents by a Court Examiner.
- Access to clinics with rotating “how-to” lectures in Spanish on Guardianship, Unlawful Detainer, Civil Harassment and Family Law.
- Volunteer interpreters on an “as needed” basis to help pro per litigants with translations at court hearings.
- Area of the law that will be covered include:  
Guardianship, Unlawful Detainer, Civil Harassment, and Family Law.

**Location Where Services Will Be Delivered:**

255 N. Fulton (adjacent to the Family Law Facilitators Office) in downtown Fresno.

**b.1. Program Partners:**

A Community Advisory Committee comprised of the following agencies was formed in August 2002:

- Central California Legal Services
- Centro La Familia
- Cesar Chavez Vocational School
- County of Fresno, County Clerk
- Economic Opportunities Commission
- Fresno County Bar Association, Pro Bono Section
- Fresno Madera Agency on Aging (FMAAA)
- Health Services System/Selma Regional Center
- Hispanic Chamber of Commerce
- Hispanic Bar Association
- La Raza Lawyers Association

Non-advisory committee partners include:

- Central Valley Access to Justice Coalition
- Southern School of Interpreting
- Fresno City College
- Duncan Polytech School

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**c.1. Program Plan: *Centro de Recursos Legales: Spanish Self-Help Center***

<i>Task</i>	<i>Deadline</i>	<i>Person/Org Responsible</i>
Form Advisory Committee	July-August 2002	Court
Facility (office) set-up	July 2002	Court
Hire Community Resource Mgr	July-September 2002	Court
Develop a comprehensive series of public service materials to promote the availability of services for Spanish speaking self-represented litigants	October 2002	Court
Opening by Chief Justice Develop Training & Orientation for Volunteers	October 2002	Court
Use the MAP unit in outlying areas with heavy Spanish speaking population	October 2002	Court
Development of Intake & Disclosure forms	November 2002	Court
Recruit and train <i>volunteer interpreters, and others</i> to assist with civil, family law and probate cases.	November 2002 forward	Advisory Committee & Court
Translation of simple instructions for 90 court forms	November '02 – January '03	Southern School of Interpreting & Court
Public Opening of: <i>Centro de Recursos Legales</i>	January 2003	Court
Hire Court Examiner	February 2003	Court
Family Law Clinics Civil Clinics Probate Clinics	February 2003 January 2004 January 2004	Advisory Committee & Court
Community Open House	September 2003	Advisory Committee & Court
Placement of simple instructions in English and Spanish for FL, UD, CH, and Guardianship matters on website.	September 2003	Court Technology Division
Recruit <i>attorneys and others</i> to assist with civil, family law and probate cases.	October 2003	Court
Implement use of customized I-CAN! Software (interaction self-help instruction using web-based technology) in English & Spanish	DV Module: Nov 2003 Fee Waiver: Jan 2004 Sm. Claims: Jan 2004 Unlawful Detainer: Jan 2004 Pet. To Est. Par.: Jan 2004 Dissolution Module (3 phases): Jan 2004 – Jan 2005	Court in collaboration with Legal Aid Society of Orange County and Central California Legal Service

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**d.1. Existing Resources That Will Be Used:**

- Current funding of \$166,00 each year for this 3-year project is provided by the Administrative Office of the Courts Self-Help Model Grant program through 2005.
- Part-time clerical staff estimated at a cost of \$14,000 annually, is provided by the Fresno Madera Area Agency on Aging.
- Non-certified volunteer interpreters are a key resource used in this program. Using a conservative calculation we estimate the court is receiving the equivalent of almost \$12,000 in services on an annual basis.
- This project will also benefit from the sharing of an I-CAN! Domestic Violence module that Central California Legal Services has purchased, but that the court will also be able to access.
- Ability to use Cesar Chavez School classrooms for clinics at no cost to the court.
- Lastly, court facilities and equipment, as well as staff comprising of Research Attorneys, Division Managers, and Senior Staff Analysts whose salary is funded through Trial Court Funds augment this program.

**e.1. Additional Resources Needed:**

If model program is successful and proves beneficial to our target population, permanent funding will be necessary to continue the program past 2005.

**f.1. Evaluation:**

An outside contractor, Berkeley Policy Associates, will use a logic model to guide the evaluation of the project. Working from a logic model will ensure that the evaluation identifies the expected objectives of the program, and allows the evaluation to go beyond the simple question of “did the project work,” to further our understanding of *how and why* the program works. The logic model describes each of the following components of the program:

1) Program goals; 2) Activities associated with each goal; 3) Process-goal rationale-why/how the program’s various activities affected projected goals; 4) Outputs associated with activities; 5) Outcomes associated with the activities, and 6) Data sources that will be used to measure these outcomes.

In addition to the BPA evaluation, the court will conduct periodic customer satisfaction surveys. See Appendix A for Evaluation Plan.

---

**a.2. Program Description: Mobile Access Project (MAP)**

Fresno County Superior Court has operated its Mobile Access Project (a mobile unit) since October 2001. It has provided needed service to court users in outlying areas, but because of staffing limitations, the mobile unit has not been able to be as active as the court would like. Part of this Action Plan is to augment the use of the Mobile Access Project to meet the needs of the remote areas in the County.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**

**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**Population To Be Served:**

While the courthouse in downtown Fresno serves the primary population base of the County, there is a significant amount of residents in the outlying cities as well. The majority of rural cities within the County do not have local courts. Refugees, migrants, and limited non-English speaking residents are part of the diverse populations seeking assistance and information from the court. The MAP unit will be used to reach out to these residents.

**Types of Services To Be Offered:**

The Mobile Access Project provides pro per litigants with education and access to the court in an efficient and effective manner by offering the following services:

- Community Outreach.
- Education and Self-Help assistance for various court issues, including, but not limited to: Family Law, Civil, and Probate matters.
- Family Law support issues.
- Volunteer attorneys to provide services.
- Bi-lingual (Spanish) assistance when available.
- Simple instructions in English and Spanish for 90 court forms.
- Individual packets (instructions and forms) by case type and action in English and Spanish.

**Location Where Services Will Be Delivered:**

Within the mobile unit which will be stationed in rural cities such as: Selma, Orange Cove, Caruthers, Riverdale, Easton, Del Rey, Huron, Mendota, San Joaquin, Tranquility, Laton, and Biola.

**b.2. Program Partners:**

The following community agencies will assist the court in this outreach program:

- Central California Legal Services
- Centro La Familia
- Economic Opportunities Commission
- Fresno County Bar Association, Pro Bono Section
- Fresno Madera Agency on Aging (FMAAA)
- Health Services System/Selma Regional Center

**c.2. Program Plan: Mobile Access Project**

<i>Task</i>	<i>Deadline</i>	<i>Person/Org Responsible</i>
Increase partnerships with community to develop additional locations for Mobile Access Project.	December 2002 forward	Court
Recruit volunteer attorneys to help provide services in the Mobile Access Project.	The unit already has volunteer attorneys and interpreters. This effort will be on going.	Court

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

Hire dedicated staff for Mobile Access Project to keep it “on the road.”	With the budget crisis in the State, funding for this task is dependent upon the State budget, and at this time we cannot estimate when this will improve.	Court and AOC.
<ul style="list-style-type: none"> <li>▪ Simple instructions in English and Spanish for 90 court forms</li> <li>▪ Individual packets (instructions and forms) by case type and action in English and Spanish</li> </ul>	November ‘02 – January ‘03	Court

**d.2. Existing Resources That Will Be Used:**

- Funding for the MAP unit initially came from Administrative Office of the Courts grant funds.
- Trial Court Funds will be used for maintenance of the unit.

**e.2. Additional Resources Needed:**

Funds are needed to hire additional staff.

**f.2. Evaluation:**

See Appendix A for Evaluation Plan.

---

**a.3. Program Description: Staff Training**

One of the consistent results of the court staff survey described in Section 1 above, was the need to provide training to all court personnel regarding the type and availability of services so that court personnel can effectively refer court users to appropriate locations and services to meet their needs. Therefore, a comprehensive court staff training program related to self-represented litigants is an important element of this Action Plan.

**Population To Be Served:**

Court staff.

**Types of Services To Be Offered:**

Training specific to assisting self-represented litigants by informing the public about available services provided by the court. Another area is legal advice. Often court staff question just how far they can go in offering legal advice; they are looking for training that will help them understand “what to say” and “what to do” when dealing with self-represented litigants. Other types of training programs that will be offered are outlined below under program plan.

**Location Where Services Will Be Delivered:**

Various court facilities.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**b.3. Program Partners:**

- Center for Judicial Education and Research (CJER), the Education Division of the Administrative Office of the Courts.
- Training materials collected from Training Coordinators from around the State.
- Staff from various court self-help programs.
- Legal Aid Society of Orange County (training of I-CAN! software)

**c.3. Program Plan: Staff Training**

<i>Task</i>	<i>Deadline</i>	<i>Person/Org Responsible</i>
Develop training materials on services currently available for SRL in Fresno County.	November 2002	Court Training Division
Volunteer training program for office and interpreters utilized at the <i>Centro de Recursos Legales</i>	November 2002 forward	Court Interpreter Division Court Training Division
Incorporate SRL training into new judge and employee orientation programs.	November 2002	Court Training Division, administrators, judges, and line staff.
Conduct training sessions on services available for SRL in Fresno.	Begin in February – May 2003, and continuing in subsequent years.	Court Training Division and Division Managers.
Conduct training sessions on unbundling services available for SRL in Fresno.	Begin in October 2003, and continuing in subsequent years.	Court Training Division Court Managers involved in unbundling.
Conduct training sessions on I-CAN! interactive software.	November 2003	Court Legal Aid Society of Orange Co. Central California Legal Service
Conduct training for staff using the MAP unit	November 2003	Court
Conduct training sessions on Legal Advice	January 2004	Court Training Division and Division Managers. CJER training programs.
Conduct training for staff when new Case Management system is in place.	October 2004	Court Technology

**d.3. Existing Resources That Will Be Used:**

Existing court facilities and equipment for both service delivery and training, as well as time and expertise of court staff.

**e.3. Additional Resources Needed:**

Grant programs sponsored by the AOC specifically targeting Training programs for development of training materials and videos.

**f.3. Evaluation:**

See Appendix A for Evaluation Plan.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**a.4. Program Description: Technology**

One key way to leverage the use of resources is to provide information to court users through the use of technology. The court has identified several areas in which the court's technology can be augmented to assist self-represented litigants, including: enhancing the court's web site, offering web-based assistance, enhancement of the telephone/technology currently in place, interactive form assistance through stand alone and/or PC work stations placed in public access areas of the court, including courthouses in the outlying rural areas of Fresno County, and finally, expand (through the Internet) availability of case information currently offered.

**Population To Be Served:**

Self-represented litigants in Fresno County.

**Types of Services To Be Offered:**

Technology based programs outlined below under program plan.

**Location Where Services Will Be Delivered:**

Fresno County court locations, including the downtown courthouse, Centro de Recursos Legales: Spanish Self-Help Center, Family Law Facilitators Office, Central California Legal Services, and courthouses in the outlying rural areas of Fresno County.

**b.4. Program Partners:**

- Legal Aid Society of Orange County (I-CAN!)
- Central California Legal Service (I-CAN! & Spanish Self-Help Center)
- EZ Legal Developers
- Local web designer/consultant

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**c.4. Program Plan: Technology**

<i>Task</i>	<i>Deadline</i>	<i>Person/Org Responsible</i>
<b>Web Site:</b>		
▪ Explore other ways to maximize existing web site resources (e.g., Santa Clara, San Mateo, AOC websites)	January 2003	Court Managers
▪ Identify additional information to be added to web site.	January 2003	Court Managers
▪ Post new information to the web site. (ADR information, EZ Legal, English/Spanish simple instructions, Case Information on Civil issues, Family Law/DV information, Unbundling Brochure and Directory, training materials for court staff)	Ongoing	Court Technology Division
▪ Analyze the feasibility and cost of hiring a web designer/ consultant	March 2003	Court Technology Division
▪ <b>EZ Legal:</b> Placement of interactive form assistance for Family Law, Small Claims, and Housing issues on website.	March 2003	Court Technology Division
▪ <b>Centro de Recursos Legales</b> Placement of simple instructions in English and Spanish for FL, UD, CH, and Guardianship matters on website.	September 2003	Court Technology Division
▪ Determine approach for web site updating and maintenance.	December 2003	Court Technology Division
▪ <b>Unbundling:</b> Placement of brochure and directory on website for easy access to attorneys and SRLs.	December 2003	Court Technology Division
▪ Contract with a web designer/ consultant.	(Date based upon funding)	Court Grant Manager & Technology Division

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

<p><b><i>I-CAN! Technology:</i></b></p> <ul style="list-style-type: none"> <li>▪ Analyze the need for interactive software and potential funding sources.</li> <li>▪ Customize I-CAN! software for Fresno County.</li> <li>▪ Install an I-CAN! stand alone Kiosk in main courthouse downtown.</li> </ul>	<p>May 2003</p> <p>DV Module: Nov 2003          Fee Waiver: Jan 2004          Sm. Claims: Jan 2004          Unlawful Detainer: Jan 2004          Pet. To Est. Par.: Jan 2004          Dissolution Module (3 phases):          Jan 2004 – Jan 2005          (Completion date dependent upon funding)</p>	<p>Court Grant Manager and Court Division Managers</p> <p>Court in collaboration with Legal Aid Society of Orange County and Central California Legal Service</p>
<p><b><i>Electronic Case Information:</i></b> Provide criminal and traffic case information available through existing “Court Connect.” Program.</p>	<p>October 2004</p>	<p>Court Technology, Criminal and Traffic Divisions</p>

**d.4. Existing Resources That Will Be Used:**

Existing court facilities and equipment for both service delivery and training, as well as time and expertise of court staff.

**e.4. Additional Resources Needed:**

- Funds to pay for a web site designer to modify and update our web site.
- Funds to update EZ Legal annually.
- Funds for customization/modification of I-CAN! software for Fresno County.
- Funds for stand along I-CAN! Kiosk.

**f.4. Evaluation:**

See Appendix A for Evaluation Plan.

---

**a.5. Program Description: Unbundling of Legal Services**

One of the most important ways to ensure that litigants are able to access justice in an effective way is to ensure that they have access to legal advice. Although many attorneys provide pro bono services now, there still remain a high number of litigants who are unable to afford an attorney to represent them on an entire case. The court will investigate the feasibility of the use of “unbundling of legal services” with members of the Bar to find creative ways to both provide help for self-represented people and to provide additional work for attorneys in the County with Family Law matters serving as an initial pilot project.

**Population To Be Served:**

- Local Attorneys
- Self represented litigants residing in Fresno County

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**Types of Services To Be Offered:**

- Hold workshops for discussion with local attorneys regarding the duties and responsibilities of limited scope representation for the self-represented litigant.
- Provide training to court staff on unbundling and its role in relation to local attorneys and litigants.
- Provide a resource manual for self represented litigants to use in selecting a limited scope representative.

**Location Where Services Will Be Delivered:**

- Workshops and Training: Fresno Superior Court conference facilities.
- Directory: Distributed at all courthouses, including those in the outlying rural areas of Fresno County, as well as self-help centers and/or community based organizations such as the Central California Legal Services and the MAP unit.

**b.5. Program Partners:**

Local Bar Association

**c.5. Program Plan: Unbundling of Legal Services**

<i>Task</i>	<i>Deadline</i>	<i>Person/Org Responsible</i>
Schedule outreach meetings with the Bar to discuss concept.	March 2003	Court Judges, Administrators, and Managers
Develop and adopt court forms/rules, etc. as needed	Completed by Judicial Council, effective July '03	Court and Judicial Council
Conduct workshops for local attorneys and court managers on unbundling using subject matter experts. First case type is Family Law.	October 2003	Court Judges, Administrators, and Managers
Conduct training sessions for court staff on unbundling services available for SRL in Fresno.	Begin in October 2003, and continuing in subsequent years.	Court Training Division and Division Managers involved in unbundling.
<ul style="list-style-type: none"> <li>▪ Printed Brochure and Directory for access to attorneys and SRL.</li> <li>▪ Placement of these materials on court's website.</li> </ul>	<p>November 2003</p> <p>December 2003</p>	<p>Court Managers</p> <p>Court Technology Division</p>

**d.5. Existing Resources That Will Be Used:**

- Grant funds from the AOC's Center for Families, Children and the Courts to implement community focused actions plans to serve self-represented litigants.
- Existing court facilities and equipment for both service delivery and training, as well as time and expertise of court staff.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**e.5. Additional Resources Needed:**

Development of unbundling procedures for case types (other than Family Law), as determined by the court and the Bar.

**f.5. Evaluation:**

See Appendix A for Evaluation Plan.

---

**3. *State Support:***

State support that would assist Fresno in supporting self-represented litigants in the County include:

- Continue to provide grant programs that target self-represented litigants.
- Provide funding for additional staff for projects that target rural underserved self-represented litigants.
- Provide funding for training of staff that provides services to this target group.
- Provide funding for technology enhancements outside of equipment; in particular, software programs that are user friendly.
- Because technology development can be costly to small courts, provide funding priority to courts that collaborate on technology projects.
- Provide priority funding to projects that *borrow* technology from another court, necessitating only a slight modification.

**4. *Unique Approaches:***

Fresno has implemented the following unique approaches in assisting self-represented litigants:

- The use of volunteer Spanish speaking interpreters for use in non-mandated cases such as Family Law and Civil matters. Interpreters are used both at the Spanish Self-Help Center and in court, reducing errors generally made when a family member is brought in to serve as an interpreter, as well as the number of continuances.
- Simple (5<sup>th</sup> grade level) instructions for 90 commonly used court forms for Family Law, Civil Harassment, Unlawful Detainer and Guardianship matters. The instructions, provided in both English and Spanish, are available at all of the courthouses, including those in the rural areas, as well as on our website.
- Community collaboration bringing together genuine working relationships among the court and the community. Collaboration with the Cesar Chavez Adult School provides larger classrooms for us to hold workshops and clinics. The Southern School of Interpreting provides us with motivated interns that train with the court's Interpreter Division and who eventually assist at the Spanish Self-Help Center and in court saving the litigants the cost of hiring an interpreter for any non-mandated matter. Fresno Madera Area Agency on Aging (FMAAA) serves the senior citizen population of Fresno. For many of these individuals, they still want to actively contribute in the community. FMAAA provides two Spanish speaking individuals who each work 20 hours at the Spanish Self-Help Center. Funding for these individuals come from a federally funded work program that assists low-income senior citizens with an income while working part-time. By using paid individuals, we are assured consistent attendance (we have had the same two for over a year) and knowledge of the purpose and services of the Center.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

Collaboration with the local community college paralegal program is our next step. Like other volunteers we use, we are looking to offer internships to students in the paralegal program. They will be able to use their acquired skills and knowledge, while self-represented litigants benefit by receiving assistance.

- Using a Mobile unit we are able to extend services to self-represented litigants out into the rural areas of Fresno County. The MAP unit is also used to reach underserved outlying farming communities where there are concentrated pockets of 65 to 98 percent Spanish speaking residents. The MAP unit is stocked with English and Spanish instructions that were developed through the Spanish Self-Help Center grant program; in effect using one program's outcomes to augment another program's needs, thus saving the court considerable money.
- Use of volunteer attorneys and interpreters at the Spanish Self-Help Center and on the MAP unit.
- Prior to recruiting volunteers for our Volunteer Interpreter Bureau, Fresno created a comprehensive training program for potential office and interpreter volunteers. All of our volunteers are first interviewed, tested, and then placed in the proper training program (i.e. office or interpreter). We find that the extensive training that the volunteers undertake is a primary factor in our significantly high retention rate.
- Regarding technology issues – Fresno has collaborated with several courts in acquiring I-CAN! modules and EZ Legal software, saving Fresno considerable development costs. In turn, we share what we develop with others. An example of this are the simple instructions for 90 court forms that were produced in English and Spanish. We have these on our website ready for any individual or court to download. In addition, we also offered these files to every court in the State on CD-Rom.
- To ensure that attorneys and court staff are aware of the same policies and procedures concerning unbundling, Fresno Superior Court conducted workshops specific for attorneys, and followed it up with court staff training. In doing so, the self-represented litigant expectations will be met allowing the proper delivery of services.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**5. *Sustaining the Action Plan:***

Fresno expects to sustain this Action Plan through the following means:

- Continue to seek out and apply for grant funds targeting self-represented litigants.
- Continually remind staff that excellent Customer Service is key when dealing with self-represented litigants. The services we provide litigants will be reflected back to us when these individuals come back into the court for their personal matter.
- Staff and volunteer training. This is important in so many ways and will be accomplished through the following:
  - Continual training of our web-based programs so that court staff can instruct users in how to access these services.
  - Customer Service training.
  - What to say and What to do when asked about legal issues.
  - Ensure that all new employees, and those transferred to departments that deal with self-represented litigants are properly trained.
  - For volunteers utilized at the *Centro de Recursos Legales*, Spanish Self-Help Center, participation in our Volunteer Training Program prior to placement at the Center.
- Continue to recruit volunteers for office and interpreter services that target pro pers.
- Collaboration; both new and ongoing with local Community Based Organizations. Using CBOs financial resources to augment the court's to enhance services for self-represented litigants.
- Continued collaboration with County agencies to reinforce the importance of self-help centers.
- Continue to collaborate with other courts in the State.
- Continue to offer assistance and support to courthouses in the outlying rural areas of Fresno County that serve self-represented litigants.
- Modify existing and/or post new information to the court's web site, ensuring residents that access the site will receive accurate and up-to-date information.
- Efficiently utilize existing court facilities and equipment, as well as time and expertise of court staff.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**APPENDIX A**  
**Evaluation Plan**

Evaluation of program results is a critical step that provides the feedback necessary to measure the effectiveness of both the strategy and delivery of service. Feedback for these programs will be accomplished through an in-house evaluation, which will be conducted upon completion of each of the proposed programs. Because these projects will center primarily on direct services to clients, a client feedback plan will be an integral part in the evaluation of this program. Client feedback will be collected using data sets with the intent of measuring quantitatively the types and number of families served, as well as specific statistical data related to the delivery of direct services.

Feedback will be collected using various manual, hard copy (paper) collection instruments. For instance, the court will collect statistical data from *client intake forms* completed by each client to measure the type and number of individuals served through this program. Other tools will involve collection of random *satisfaction surveys* and *personal interviews*.

Program evaluation provides the feedback to measure strategy, delivery of service and most important, data, to foster a cycle of continuous program improvement. In evaluating results from these programs, the court will review information from outcome measures to: assess effectiveness of strategies and efficiency of operations; revise service design and delivery; and if necessary, reallocate resources. Fundamental to the completion of this program evaluation will be an ongoing monitoring of the specific activities of the project.

Equally important is *Outcome evaluation* data, which is key in knowing if overall, a program was successful. Included in the outcome program evaluation report will be the project's goals and objectives, strategies used to accomplish them, success, failure, and recommendations, as well as answers to the following questions:

- Did we do what we said we were going to – why or why not?
- Were we successful in attaining expected outcomes – why or why not?
- What changes are recommended?

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF FRESNO**  
**ACTION PLAN TO ASSIST SELF-REPRESENTED LITIGANTS**

---

**APPENDIX B**  
**Self-Represented Litigant Master Plan Committee**  
**January 2002 through June 2002**

<b>Name</b>	<b>Title</b>	<b>Email</b>
Gary Hoff	Presiding Judge	<a href="mailto:Ghoff@fresno.ca.gov">Ghoff@fresno.ca.gov</a>
John Gallagher	Judge – Probate	<a href="mailto:Jgallagher@fresno.ca.gov">Jgallagher@fresno.ca.gov</a>
James Petrucelli	Judge – Family Law	<a href="mailto:Jpetrucelli@fresno.ca.gov">Jpetrucelli@fresno.ca.gov</a>
Tamara Beard	Court Executive Officer	<a href="mailto:Tbeard@fresno.ca.gov">Tbeard@fresno.ca.gov</a>
Judi Waterman	Managing Attorney	<a href="mailto:Jwaterman@fresno.ca.gov">Jwaterman@fresno.ca.gov</a>
Sat Franco	Special Projects Manager	<a href="mailto:Sfranco@fresno.ca.gov">Sfranco@fresno.ca.gov</a>
Sue Kern	Family Law Facilitator	<a href="mailto:Skern@fresno.ca.gov">Skern@fresno.ca.gov</a>
Sharon Borbon	Law Librarian	<a href="mailto:Sborbon@fresno.ca.gov">Sborbon@fresno.ca.gov</a>
Kimberly Nysrtom-Geist	Private Practice Atty - Family Law	<a href="mailto:Knystgeist@lsnglaw.com">Knystgeist@lsnglaw.com</a>
Poncho Baker	Private Practice Atty - Civil	<a href="mailto:Kpb@sfjlaw.com">Kpb@sfjlaw.com</a>
Linda Richardson	Attorney – Central California Legal Services	<a href="mailto:Linda@centralcallegal.org">Linda@centralcallegal.org</a>
Kerri Keenan Committee Coordinator	Planning & Outreach Fresno Superior Court	<a href="mailto:Kkeenan@fresno.ca.gov">Kkeenan@fresno.ca.gov</a>
Shelley Stump Committee Consultant	Coyote Moon Consulting	<a href="mailto:Shellstump@earthlink.net">Shellstump@earthlink.net</a>

**For further information regarding this Action Plan please contact:**

**Ms. Patty Wallace, Grants Manager, Fresno Superior Court**  
**Phone: (559) 443-5560    Email: [pwallace@co.fresno.ca.us](mailto:pwallace@co.fresno.ca.us)**