

*Developing a Coordinated Service
Model for Self-Representing Litigants*

*Proposed Service Vision
and Program Design*

Project Team:

*Gayla Reid, Donna Senniw
& John Malcolmson*

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Table of Contents

1. Introduction	3
2. A service vision	3
3. Project governance	6
4. The proposed service model	6
5. Administrative issues	11
6. Focus of the service	13
7. Implementing the model: steps and timelines.....	13
8. Expanding the service scope	14
9. Implementing the model: major outstanding issues	14
10. Evaluating a pilot implementation of the model	15
Appendix A: Service model roles and responsibilities arranged by partner	17
Appendix B: Draft contents of project job functions.....	19
Appendix C: List of recommendations by report section	22

1. Introduction

This report covers phase two of the Self-Representing Litigants project and focuses on the development of a service vision, model and implementation plan for a proposed *Self-Represented Litigants' Self-Help Centre* in the family and civil justice areas.

Specific work tasks associated with this phase were to determine what a model should look like for coordinating self-help services for SRLs at the 800 Smythe St. and New Westminster courthouses, and to develop a strategy for the implementation of pilot projects at both courthouses.

For phase two, the researchers' initial task was to contact and interview service providers from the agencies and institutions that have contact with SRLs in Supreme Court in civil and family matters. Interview guides for the mapping of services and needs linked questions about needs, issues and gaps, with ideas regarding the ways agencies may collaborate in the future to meet the identified needs of SRLs.

Having identified the needs, issues, and gaps in the mapping report, the research team focused efforts on answering the following questions:

- How might creating a collaborative service assist SRLs, the organizations that currently help SRLs, and the court itself?
- What would such a service model look like?
- What resources would this service model require and how might it operate?
- What specifically might various organizations contribute to building such a model?

The interviews for phase two were conducted in two waves. First, service providers were interviewed as part of the mapping. Second, key service providers were interviewed again, often on several occasions, as the vision for the service took shape.

2. A service vision

Project research in phase one indicates that SRLs have a multiplicity of needs in relation to their court action. These needs include:

- understanding the structure and operation of that part of the justice system where they intend to pursue a resolution to their legal problems;
- identifying specific legal issue(s) and relevant legal options;

- completing necessary court forms and other documents;
- conducting relevant legal research associated with self-representation;
- getting prepared to speak to legal issues in court;
- appearing in court or in chambers to self-represent; and,
- doing necessary follow-up to court appearances.

To address these needs, a unified service model for SRLs must be established. The service model will have its own identity based on a collaborative arrangement linking different service providers. It will strive for continuity of service to SRLs through direct and personal contact. It will provide necessary communication and coordination functions amongst those currently offering services to SRLs. And it will offer needed outreach functions in regard to other community-level resources for SRLs.

The centre will operate as a discrete service, with its own identity, its own principles and protocols, its own communications image and outreach strategy. The relationship of the stakeholders with the service will be defined by sign-on to an initial memorandum of understanding.

The service model will have a client-centred focus and a user-friendly approach. It will have the capacity to assess where an SRL currently is and what needs to happen next. It will offer services that are objective in nature and provided by skilled, patient and experienced staff. (For a description of job functions, see Appendix B). Referrals will be made to outside resources when avenues for alternate dispute resolution are appropriate.

Based on the collaboration of stakeholders and service providers, the service model will provide greater continuity of service to SRLs with less risk of duplication. The vision of the service model also contemplates successful efforts during the pilot phase to obtain the ongoing support of all partners that will enable the service to continue to SRLs in both court locations.

In specific terms, the service model will strive to assist people pursuing self-representation by providing them with the following:

- *A central point of contact for information on the court system, procedures involved in self-representation, options and support services.*

SRLs experience the legal system and the services available to them in a disjointed way. The model proposes a central point of contact, at or near the courthouse, where a litigant can go for initial information and return for guidance or further referrals at any time through the process of litigation.

- *Access to legal advice via different legal agencies.*

The SRL will need to access legal advice at several stages through the court process. The centre will be able to refer the litigant to paid counsel as well as to pro bono and duty counsel for a range of advice services. One of the important functions of providing access to legal advice is to ensure that self-representing litigants have counsel on the advisability of pursuing their intended course of action, and whether the court can provide them with the remedy that they seek.

- *Access to educational resources capable of building skills and enhancing understanding of specific court procedures.*

Most of the knowledge SRLs have about the legal system comes from the popular media, and much of that is American in origin and therefore of limited application to our system. SRLs' expectations of what is required and what the courts can do for them are not always in keeping with reality. One way of empowering them to move effectively through the court process is through education. Education for the SRL needs to cover the basics of moving a case through the court process. They need initial orientation to the court, how it works, what it does and what it can or cannot achieve. They need to know the steps in a court action, what evidence is and how to get it into court, how to conduct a chambers motion and/or a trial, how to present in court, and what is involved in an appeal. Courses for SRLs would cover those areas, as well as a specific course on the conduct of judicial reviews, which are commonly sought by lay litigants in a residential tenancy context. The educational component of the model would combine classroom instruction with videotape and printed materials. Checklists and precedents would be available for the participant to take home with them.

- *Assistance with any legal research required.*

Some SRLs may need or want more detailed legal information than offered through the classes in the Centre, or than pro bono counsel has the time or knowledge to give them. These parties will be referred to the Courthouse Library, where a librarian can assist them in finding the specific information they require.

The service model will help make the court system more accessible for SRLs. This, in turn, can be expected to lessen the adverse impact on the justice system caused by litigants who are not properly resourced for the tasks and pressures that await them.

3. Project governance

Recommended strategies for start up

3.1 The research team recommends creation of a Stakeholder Management Committee to assume ongoing control and responsibility for the operation of the SRL self-help centres for the pilot phase, and that this Committee strike subcommittees as appropriate to address implementation issues of the major service components.

The stakeholder management committee should comprise representatives from stakeholder groups making a substantive contribution to the service model. It should meet on a regularly scheduled basis to review operation of the pilot project, deal with questions and issues that arise, and make decisions regarding overall project direction.

3.2 The researchers recommend that the Stakeholder Management Committee strike subcommittees to focus on each of the proposed service areas: (a) information and referral; (b) education; and (c) legal research. These subcommittees will be able to draw upon the members' areas of expertise to address the details of implementation within each of the service areas. An additional subcommittee should be struck to review the area of legal advice and legal assistance, with a view to (a) exploring what the Centre's role might be in the future with respect to advice/assistance; and (b) clarifying the distinction between legal advice and legal information as it will apply to the Centre's provision of information services.

4. The proposed service model

Following on project research, mapping and consultation activities, the research team is proposing creation of a centre housed within a defined and accessible physical space to organize and coordinate the delivery of services to SRLs in accordance with a unified service model. The centre will deliver service components based on the contributions made to the model by partnering organizations and stakeholders.

Existing partner commitments to service components can be summarized as follows:

<p>Information and referral: To provide SRLs with access to basic information on and orientation to the court system, procedures involved in self-representation, options and support services.</p>
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Contributing partners:

Law Courts Education Society, Legal Services Society, Court Registries, the BC Courthouse Library Society

Recommended strategies for start-up:

4.1 *The research team recommends that all members of the steering committee contribute copies of their organization's information materials/resource lists for SRLs to be used the Centre. This should include a list of URLs for their online materials.*

4.2 *The research team recommends that all members of the steering committee commit to identifying additional PLEI materials/resource lists relevant to SRLs available from other groups, including law firms.*

4.3 *The research team recommends that, when hired, centre staff organize the collection of resource materials under the direction of the stakeholder management committee.*

4.4 *The research team recommends that centre staff develop and maintain a comprehensive list of available SRL resources.*

4.5 *The research team recommends that the Stakeholder Management Committee, working with centre staff, identify the range and scope of checklists to be produced. Further, the team recommends that the Legal Services Society contribute publications expertise to the development process in this area.*

<p>Education: To provide SRLs with the basics of moving a case through the court process: initial orientation to the court, the steps in a court action, what evidence is and how to get it into court, how to conduct a chambers motion and/or a trial, how to present in court and the mechanics of an appeal.</p>

Contributing partners:

Law Courts Education Society, Community Legal Assistance Society, Pro bono services, Legal Services Society, Community Legal Assistance Society, BC Courthouse Library Society, Court Registries, People's Law School, the private bar and other community groups.

Recommended strategies for start-up:

4.6 *The research team recommends that the Law Courts Education Society develop materials for two presentations for SRLs.*

The first presentation will be an initial orientation that provides an overview of the process. The orientation will have a core generic component, with additional components for family procedures and civil procedures.

The second presentation will be a hands-on simulation session that gives SRLs a walk-through in a real court setting, to help them become more accustomed to how the process operates and what is expected of them. This

presentation will provide options to focus on either chambers applications or trials.

4.7 The research team recommends that the Community Legal Assistance Society (CLAS) prepare a presentation based on the procedural information contained in David Mossop's "Judicial Review: a Lay Person's Guide" and augmented by the development of substantive materials in this area.

Based on the mapping indicators, it is expected that the focus of the judicial review sessions will be on landlord/tenant issues, and that the sessions will address procedural and substantive issues. The sessions, which will be offered in-person, have the potential of being able to reach additional SRLs by being offered online and by video. CLAS can arrange with Centre staff to advertise the sessions through already established poverty law networks, as well as making information about the sessions available to drop-ins.

Sessions should also be open to community advocates who provide services to SRLs at the community level.

4.8 The research team recommends that the BC Courthouse Library Society provide an orientation session for SRLs to library and web resources as well as providing support to SRLs seeking follow-up from the LCES and CLAS sessions.

4.9 The research team recommends that the People's Law School work with volunteer lawyers from the private bar to provide, as needed, classes for SRLs on (a) evidence: what it is and how it is introduced in court; and (b) appeals: what an appeal is and what it can and cannot do for the litigant (in liaison with counsel for the Court of Appeal).

The People's Law School has indicated a willingness to work with volunteer lawyers from the private bar to provide, as needed, classes for SRLs on (a) evidence: what it is and how it is introduced in court; and (b) appeals: what an appeal is and what it can and cannot do for the litigant. The content of any sessions on appeals would need to be developed in liaison with counsel to the Court of Appeal for British Columbia. With respect to course provision, note that the People's Law School has also indicated a willingness to make space available at its premises for after-hours use.

<p>Access to legal advice: To provide access to legal advice and assistance at strategic points</p>
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Contributing partners:

Legal Services Society, Pro Bono Law of BC, Law Society

As the mapping report indicates, access to strategically placed legal advice is one of the major needs for SRLs, identified by both service providers and SRLs themselves.

With respect to this service, note that the BC Courthouse Library Society has offered rooms that could be made available at each pilot location for the provision of legal advice by a pro bono service.

Recommended strategies for start-up

4.10 The research team recommends that Pro Bono Law of BC liaise with the pro bono service providers so that legal advice services may be fully integrated with the centre's services.

4.11 The research team recommends that Pro Bono Law BC, through the Pro Bono Civil Duty Counsel Project, establish a program to assist SRLs in summary matters in chambers.

4.12 The research team recommends that the stakeholder management committee investigate ways in which further pro bono opportunities may be developed for the provision of legal advice to SRLs.

4.13 The research team recommends that the stakeholder management committee develop protocols and procedures that clearly define the boundaries between legal advice and legal information in relation to the centre's services.

<p>Access to assistance with forms, organization and documents: To provide SRLs with access to hands-on assistance to help them organize their materials, complete forms and documents and draft affidavits.</p>

Contributing partners:

Pro Bono Law of BC and pro bono services, Legal Services Society, Law Society

Recommended strategies for start up

4.14 The research team recommends that Pro Bono Law of BC liaise with pro bono service providers so that hands-on procedural assistance may be fully integrated with the centre's services.

4.15 The research team recommends that the centre develop handouts explaining commonly used Supreme Court rules.

4.16 The research team recommends that the stakeholder management committee investigate ways in which further pro bono opportunities may be developed for the provision of assistance with forms and documents to SRLs.

Help with completing required court forms and other documents was identified in the mapping process as a priority need for SRLs. The forms and documents of the court process are foreign to SRLs. When those are added to a stew that has high emotional content and an unfamiliar terrain, the resulting recipe is one of confusion and bewilderment. All of the education, printed material and internet-based information in the world are not enough to address this quandary. It is with these tasks especially that an SRL needs hands-on assistance.

While a lawyer's time may be the ideal assistance, it is a scarce and expensive resource and would be better utilized once documents have been drafted and organized. Informants for the research into the design of the service suggested a range of innovative ways in which pro bono services may be used to provide hands-on assistance with the drafting and organizing of forms.

Articled students, working under the direction of a supervising lawyer, may be able to provide pro bono assistance to SRLs in areas that include the completion of forms and the writing of orders. Assistance could potentially also be offered, under the direction of a supervising lawyer, by the Pro Bono Students Canada at UBC. Before any such strategy can be recommended, the stakeholder management committee must undertake a full exploration of the implications of using students to provide these services.

With the development of appropriate best practices, the addition of these pro bono services would greatly enhance the ability of the centre to meet the needs of SRLs.

Substantive legal information: To provide services to SRLs who may need or want more detailed legal information. SRLs will be referred to the Courthouse Library, where a librarian can assist them in finding the specific information they require.

Contributing partners:

B.C. Courthouse Library Society, Legal Services Society

Recommended strategies for start up

4.17 The research team recommends that the BC Courthouse Library Society establish procedures for linking with the centre to provide substantive legal information to SRLs.

4.18 The research team recommends that the BC Courthouse Library Society prepare a research guide for SRLs on web-based resources.

4.19 *The research team recommends that LSS establish a LawLINK kiosk in the Centre for use by SRLs.*

4.20 *The research team recommends that the Centre develop handouts for SRLs on web-based resources that can assist SRLs seeking substantive legal information.*

Problem resolution outside of the court process: To refer where appropriate potential SRLs to dispute resolution mechanisms, such as mediation with Family Justice Counsellors.

Contributing partner:
Family Justice Counsellors

Recommended strategies for start up

4.21 *The research team recommends that the Vancouver Family Justice Centres establish protocols regarding services that they provide related to the Centre.*

4.22 *The research team recommends that the stakeholder management committee liaise with the BC Mediator Roster Society and the BC Dispute Resolution Practicum Society to discuss the possibility of referrals from the centre where appropriate.*

4.23 *The research team recommends that other services potentially be added as the pilot project is implemented and as staff and administrators gain greater experience in delivering a coordinated range of services to SRLs.*

In its initial stages, services should concentrate on referral to legal advice/assistance, provision of information, orientation to and education on court process and procedure, and assistance with legal research.

5. Administrative issues

Project space

The centre will require counter space, including space to store checklists, precedents, educational materials and resource lists. It will require space for computers that the public can access, space for private consultations. It will also require space to run courses, and/or allow for the viewing of videotapes. These functions need not be all in one location, but they should be accessible after business hours and near the courthouse.

The physical location of the self help centre must also:

- be safe and convenient for litigants;
- be central, close to or within the courthouse complex;
- include a private place to discuss litigant's issues;

- have a computer available;
- have printed materials available; and ,
- be close to other resources.

To this point, the project has explored options for acquiring service space in two locations.

Recommended strategies for start up

5.1 The research team recommends that a service site within the Law Courts Complex be established as the first priority for operation of the proposed centre.

Having the centre within the courthouse complex would help to build its profile within the formal law court system, something that could help the centre secure necessary support as it initiates operation. Preliminary inquiries indicate that situating the centre within the courthouse complex might be accomplished with no space rental cost.

5.2 If this recommendation is not possible, the research team recommends that the project explore options for acquiring space for the centre at People's Law School adjacent to the courthouse complex.

Preliminary discussions to this effect have already been initiated to ascertain how such space might be organized as well as possible terms and conditions for lease. If the centre obtains appropriate space within the courthouse, occasional use of the People's Law School facilities could remain an option for the provision of after-hours services.

Project staffing

Recommended strategies for start up

5.3 The project team recommends the Centres be staffed with the following personnel configuration:

- *A time-limited (approximately four months) project manager to provide start-up expertise;*
- *A full-time coordinator position to be responsible for the centre's daily operations.*

See Appendix B for a description of job functions.

Employment relationships

To the maximum degree possible and to facilitate proper administration of the centre, those employed by the project should have a common employer.

Recommended strategies for start up

5.4 *The research team proposes that the Legal Services Society be the formal employer for project manager.*

5.5 *The research team recommends that details regarding staff hours and levels of remuneration be elaborated in accordance with available funding arrangements and parameters, and in accordance with confirmed stakeholder commitments to the service model.*

The employer for the centre coordinator function is yet to be finalized.

6. Focus of the service

The mapping part of this project indicated that while SRLs have a range of family and civil problems, the greatest demand is expected to be in the area of family law.

Recommended strategies for start up

6.1 *The research team recommends that the stakeholder management committee identify family law as the first priority for the provision of services.*

6.2 *The research team recommends that other priority areas of need indicated in the mapping stage of the project also be included in the service model, with these to include:*

- *Judicial review;*
- *Debt and bankruptcy; and*
- *Probate*

7. Implementing the model: steps and timelines

Recommended strategies for start up

7.1 *The research team is recommending that a two-year pilot project be implemented, pending pilot funding approval.*

7.2 *The research team recommends that a SRL Self-Help Centre be established at the Supreme Court location in downtown Vancouver in Year 1.*

The project manager could begin work as soon as funding is confirmed, but should begin work by September 2004. The project manager, reporting to the stakeholder management committee, will recommend a launch date, proceed with organizing a physical space, confirm operating protocols and procedures, solidify linkages amongst participating stakeholders and the services they are contributing, and confirm connections with referring agencies and groups in the community. These responsibilities will also include setting a target date for when the Centre would open to the public

and begin the active phase of providing services to SRLs, in accordance with the agreed-upon service model.

7.3 The research team recommends that a second Centre be opened at the New Westminster courthouse location in September, 2005.

A precise timetable would be elaborated for the second Centre's opening its doors to the public, based on what is learned from the evaluation of year 1 experiences at the Vancouver location. Priority would be given to establishing the Centre within the Court so as to maximize public accessibility. If such space is not available, finding a space in an adjacent facility would become the priority.

7.4 The research team recommends that the stakeholder management committee seek the support of all service providers to SRLs in order to ensure the ongoing sustainability of the two centres following the completion of the pilot project in August 2006.

8. Expanding the service scope

The start-up model recommended for the centre focuses on the provision of information, education, research assistance, and referrals for legal advice/assistance.

8.1 The research team recommends that, given the dimension of the need identified by service providers and SRLs in the mapping phase for hands-on assistance with the completion of forms, exploring the possibility of expanding the centre's work to include this service be identified as priority task once start-up has been completed.

9. Implementing the model: major outstanding issues

The major outstanding issues for start-up are as follows:

- The space (or spaces) where the Centre will be located must be finalized.
- The formal employer status for centre positions must be determined.
- Supervisory relations for centre staff must be confirmed.
- Project funding must be secured for the pilot project
- The specific roles, responsibilities and service contributions of all stakeholders must be confirmed
- The framework and timetable for pilot implementation must be confirmed.

Dealing with these start-up-related issues requires that the project steering committee take steps to establish a stakeholder management committee and

determine the latter's role. Implementation tasks awaiting the stakeholder management committee include the following:

- Determining the specific role and mandate of project manager;
- Hiring the project manager;
- Determining responsibilities for day-to-day administration and oversight;
- Establishing working relationships with stakeholder groups;
- Establishing specific budget allocations for project;
- Finalizing the acquisition of space for project;
- Confirming employer and supervisory relationships for centre staff and any others working within the centre in concert with stakeholders;
- Continuing to plan for second pilot site; and,
- Investigating other sources of potential funding support.

The research team notes that comparable models of SRL services in other jurisdictions are characterized by the involvement of Court Services.¹ Given this, the team recommends that the steering committee consider liaison with Court Services at the Deputy/ Assistant Deputy Minister level to promote the Centre's goals and its collaborative service model. This liaison could canvass the possibility of a commitment of resources, within the context of potential pilot project funding from the Law Foundation.

10. Evaluating a pilot implementation of the model

Data will be gathered on services provided by the Centre can and should be used in the evaluation of the pilot project.

Recommended strategies for start up

9.1 The research team recommends that service model and approach be evaluated, from the vantage point both of the services themselves and of the needs of SRLs.

9.2 The research team recommends the evaluation approach be designed with a goal of sustainability beyond the initial pilot period, and with a view to making it adaptable to other locations.

9.3 The research team recommends the evaluation plan ensure that the pilot project gathers required statistical information to document project experiences and outcomes.

¹ See, for example, *Statewide Action Plan for Serving Self-Representing Litigants*, Judicial Council of California, 2004.

9.4 The research team recommends that formative evaluation approaches are used to provide ongoing assistance to the service model and that summative evaluation requirements be identified and met to ensure proper project accountability.

9.5 The research team recommends that the evaluation strategy used for the pilot phase include components to address issues raised by the federal Department of Justice relating to the area of public access to legal aid services.

9.6 The research team recommends that the evaluation strategy used for the pilot project be developed where possible to include components incorporating the Canadian Forum on Civil Justice's Civil Justice System and the Public Project's interest in improving communication between the civil justice system and the public with an end to showcasing the pilot service model as a case study example of good practices.

Appendix A: Service model roles and responsibilities arranged by partner

The specific roles and responsibilities of each agency will be carried out in accordance with the collaborative service model, under the direction of the stakeholder management committee.

Roles and responsibilities can be described as follows:

Legal Services Society

- Provides extensive legal information and legal assistance, from LawLINE and LSS LINK, to the LSS family law website, print/online publications, and AV materials
- Participates in development of checklists
- Participates in collection and maintenance of PLEI materials, including a list of SRL resources
- Explores the possibility of acting as a formal employer of centre staff and defines the precise nature of this commitment. Cost of administration would be a budget item.

LSS members of the steering committee will take the proposal for these services to management, and then to the LSS board. June is earliest possible time for a decision. The goal is to work with already existing LSS services at the court in order to provide centre services.

Law Courts Education Society

- Provides education sessions on: steps in court process; conduct of chambers motions, conduct of trial, deportment in court, practice presentations
- Participates in development of checklists
- Participates in maintenance of list of PLE materials and resources, including list of all SRL service providers
- Liaises with People's Law School re: education on substantive law

The Law Courts Education Society will develop and deliver two education sessions. The project will need to budget for course development.

Community Legal Assistance Society

- Provides educational sessions on judicial review: what it is, how to prepare - with an emphasis on RTA matters

The Community Legal Assistance Society will be delivering course material they have already developed on procedure. The project will need to budget for the development of the additional substantive law component and for session presentation.

Pro Bono Law of BC

- Liaises with pro bono service providers (Salvation Army, Access Justice) about providing a coordinated service to SRLs
- Explores the implications of future possible expansion of service to include articulated students/law student assistance with forms, organization and documents.

Court Registry

- Provides information and referral

B.C. Courthouse Library Society

- Provides information and referral
- Provides orientation to SRLs on library use
- Provides SRL with legal research assistance
- Provides a guide for SRLs on conducting web-based research
- Provides space at each court location suitable for AV use or other appropriate SRL program use; use of the room will be the responsibility of the centre

Family Justice Counsellors

- Maintains a referral and information-sharing relationship with the Centre.

Other commitments

- The People's Law School has indicated willingness to find volunteer lawyers to provide classes to SRLs on (a) evidence and (b) appeals, if there is sufficient demand. The People's Law School is also willing to provide space (office/meeting rooms for use during the day and after hours) if required. These arrangements would be a budget item for the project.

Appendix B: Draft contents of project job functions

These descriptions are offered with a view to grouping necessary job functions rather than defining precise job responsibilities.

Project Management

This function would be time-limited (approx. 4 months) and would address the following tasks:

Space

- Finalize service location(s) and arrangements
- Oversee the determination of furnishing, equipment and supply needs, and the provision of same

Policies

- Work with stakeholder management committee to establish policies regarding services provided and operations of self-help centre

Staffing

- Develop job descriptions and staffing model
- Explore options for potential secondment of centre coordinator person
- Determine supervision and reporting structures
- Hire staff
- Assign tasks to assist with ramping up

Organization

- Oversee provision of PLEI materials (booklets, checklists etc)
- Develop communication plan between Self-Help Centre and stakeholders and other service providers
- Oversee the development of internal documentation requirements and statistical case/client tracking system and internal filing system
- Oversee development and implementation of quality assurance guidelines
- Oversee the development of a filing system

Training

- Oversee the provision of training to staff and volunteers, as required

Job Descriptions

- Work with stakeholder management committee to develop detailed job descriptions for staff positions

Centre preparation

- Organize publicity
- Communicate with judiciary, registry, bar, stakeholders and other service providers

Centre Coordination

This function would address the following tasks:

- Be responsible for the operational coordination of centre activities
- Provide frontline service to SRLs.
- Give SRLs information on the next steps to take regardless of where they are in the court process.
- Make referrals to other court-system and outside resources.
- Make bookings into SRL education programs.
- Make bookings into educational programs offered by other service partners in accordance with established protocols.
- Coordinate provision of PLEI materials (booklets, checklists etc)
- Provide SRL with printed materials, checklists and lists of available resources to assist them with their court matter.
- Assist SRLs to access resources available on the Internet.
- Work with education course providers to determine and schedule for courses and manner of booking.
- Canvass the possibility of alternative dispute resolution with SRLs and where appropriate make referrals to possible dispute resolution service.
- Communicate with other service providers (system and community-based) about the availability of services to SRLs.
- Implement internal documentation and statistical case/client tracking system; maintain the project data gathering system for

purposes of recording project experiences, client information and to fulfill formal evaluation requirements of the pilot phase.

Appendix C: List of recommendations by report section

3.1 The research team recommends creation of a Stakeholder Management Committee to assume ongoing control and responsibility for the operation of the SRL self-help centres for the pilot phase, and that this Committee strike subcommittees as appropriate to address implementation issues of the major service components.

3.2 The researchers recommend that the Stakeholder Management Committee strike subcommittees to focus on each of the proposed service areas: (a) information and referral; (b) education; and (c) legal research. These subcommittees will be able to draw upon the members' areas of expertise to address the details of implementation within each of the service areas. An additional subcommittee should be struck to review the area of legal advice and legal assistance, with a view to (a) exploring what the Centre's role might be in the future with respect to advice/assistance; and (b) clarifying the distinction between legal advice and legal information as it will apply to the Centre's provision of information services.

4.1 The research team recommends that all members of the steering committee contribute copies of their organization's information materials/resource lists for SRLs to be used the Centre. This should include a list of URLs for their online materials.

4.2 The research team recommends that all members of the steering committee commit to identifying additional PLEI materials/resource lists relevant to SRLs available from other groups, including law firms.

4.3 The research team recommends that, when hired, centre staff organize the collection of resource materials under the direction of the stakeholder management committee.

4.4 The research team recommends that centre staff develop and maintain a comprehensive list of available SRL resources.

4.5 The research team recommends that the stakeholder management committee, working with centre staff, identify the range and scope of checklists to be produced. Further, the team recommends that the Legal Services Society contribute publications expertise to the development process in this area.

4.6 The research team recommends that the Law Courts Education Society develop materials for two presentations for SRLs.

- 4.7 The research team recommends that the Community Legal Assistance Society (CLAS) prepare a presentation based on the procedural information contained in David Mossop's "Judicial Review: a Lay Person's Guide" and augmented by the development of substantive materials in this area.
- 4.8 The research team recommends that the BC Courthouse Library Society provide an orientation session for SRLs to library and web resources as well as providing support to SRLs seeking follow-up from the LCES and CLAS sessions.
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- 4.10 The research team recommends that Pro Bono Law of BC liaise with the pro bono service providers so that legal advice services may be fully integrated with the centre's services.
- 4.11 The research team recommends that Pro Bono Law BC, through the Pro Bono Civil Duty Counsel Project, establish a program to assist SRLs in summary matters in chambers.
- 4.12 The research team recommends that the stakeholder management committee investigate ways in which further pro bono opportunities may be developed for the provision of legal advice to SRLs.
- 4.13 The research team recommends that the stakeholder management committee develop protocols and procedures that clearly define the boundaries between legal advice and legal information in relation to the centre's services.
- 4.14 The research team recommends that Pro Bono Law of BC liaise with pro bono service providers so that hands-on procedural assistance may be fully integrated with the centre's services.
- 4.15 The research team recommends that the centre develop handouts explaining commonly used Supreme Court rules.
- 4.16 The research team recommends that the stakeholder management committee investigate ways in which further pro bono opportunities may be developed for the provision of assistance with forms, organization and documents to SRLs.
- 4.17 The research team recommends that the BC Courthouse Library Society establish procedures for linking with the centre to provide substantive legal information to SRLs.

4.18 The research team recommends that the BC Courthouse Library Society prepare a research guide for SRLs on web-based resources.

4.19 The research team recommends that LSS establish a LawLINK kiosk in the Centre for use by SRLs.

4.20 The research team recommends that the Centre develop handouts for SRLs on web-based resources that can assist SRLs seeking substantive legal information.

4.21 The research team recommends that the Vancouver Family Justice Centres establish protocols regarding services that they provide related to the Centre.

4.22 The research team recommends that the stakeholder management committee liaise with the BC Mediator Roster Society and the BC Dispute Resolution Practicum Society to discuss the possibility of referrals from the centre where appropriate.

4.23 The research team recommends that other services potentially be added as the pilot project is implemented and as staff and administrators gain greater experience in delivering a coordinated range of services to SRLs.

5.1 The research team recommends that a service site within the Law Courts Complex be established as the first priority for operation of the proposed centre.

5.2 If this recommendation is not possible, the research team recommends that the project explore options for acquiring space for the centre at People's Law School adjacent to the courthouse complex.

5.3 The project team recommends the Centres be staffed with the following personnel configuration.

- A time-limited (approximately four months) project manager to provide start-up expertise;
- A full-time coordinator position to be responsible for the centre's daily operations.

5.4 The research team proposes that the Legal Services Society be the formal employer for project manager.

5.5 The research team recommends that details regarding staff hours and levels of remuneration be elaborated in accordance with available funding arrangements and parameters, and in accordance with confirmed stakeholder commitments to the service model.

6.1 The research team recommends that the stakeholder management committee identify family law as the first priority for the provision of services.

6.2 The research team recommends that other priority areas of need indicated in the mapping stage of the project also be included in the service model, with these to include:

- Judicial review;
- Debt and bankruptcy; and
- Probate

7.1 The research team is recommending that a two-year pilot project be implemented, pending pilot funding approval.

7.2 The research team recommends that a SRL self-help centre be established at the Supreme Court location in downtown Vancouver in Year 1.

7.3 The research team recommends that a second centre be opened at the New Westminster courthouse location in September, 2005.

7.4 The research team recommends that the stakeholder management committee seek the support of all service providers to SRLs in order to ensure the ongoing sustainability of the two centres following the completion of the pilot project in August 2006.

8.1 The research team recommends that, given the dimension of the need identified in the mapping phase for hands-on assistance with the completion of forms, exploring the possibility of expanding the centre's work to include this service be identified as priority task once start-up has been completed.

9.1 The research team recommends that service model and approach be evaluated, from the vantage point both of the services themselves and of the needs of SRLs.

9.2 The research team recommends the evaluation approach be designed with a goal of sustainability beyond the initial pilot period, and with a view to making it adaptable to other locations.

9.3 The research team recommends the evaluation plan ensure that the pilot project gathers required statistical information to document project experiences and outcomes.

9.4 The research team recommends that formative evaluation approaches are used to provide ongoing assistance to the service model and that summative

evaluation requirements be identified and met to ensure proper project accountability.

9.5 The research team recommends that the evaluation strategy used for the pilot phase include components to address issues raised by the federal Department of Justice relating to the area of public access to legal aid services.

9.6 The research team recommends that the evaluation strategy used for the pilot project be developed where possible to include components incorporating the Canadian Forum on Civil Justice's Civil Justice System and the Public Project's interest in improving communication between the civil justice system and the public with an end to showcasing the pilot service model as a case study example of good practices.