

Standing Committee on the Delivery of Legal Services (SCDLS) 2007 Year-End Assessment

APPOINTMENTS

1. ***How did the activities of your committee further completion of your committee's charge?***
The activities furthered the administration and governance of SCDLS and all aspects of the charge.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
Recruitment of qualified attorneys from practice areas and settings that would be of benefit to SCDLS: corporate, IOLTA funded program with strong pro bono experience, rural/central valley, local bar leadership. All areas were achieved except for corporate. Corporate continues to be the most challenging practice setting for recruitment purposes, as well as for soliciting pro bono awards nominations.
3. ***How was program success measured?***
Success was measured by the total number of applications received, the number of applications that list SCDLS as first priority, applicants from a variety of legal services practice settings and diverse backgrounds, and the overall quality of each applicant (e.g. demonstrated commitment to the delivery of legal services to low- and moderate-income individuals)
4. ***What type of information has been presented related to the performance measures?***
Qualitative and quantitative.
5. ***What additional information is needed and when can that information feasibly be provided?***
Not applicable.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
Conduct targeted outreach and recruitment among State Bar subentities in addition to external entities. Consider interviewing qualified applicants as part of the evaluation process (*note: telephone interviews have been implemented as of 2008*). If applicant pool lacks qualified applicants, consider holding one position open to continue recruitment efforts.

AWARDS

1. ***How did the activities of your committee further completion of your committee's charge?***
Identify, develop and supports improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
The overall number of awards nominations was satisfactory. Publicity and outreach for the awards were conducted well in advance of the nomination deadline with members making individual contacts with local, minority and women's bar associations, legal services providers and other entities, and distributing the information more widely (including more information on the State Bar website). However, no nominations were received in the corporate and emeritus attorney/limited active practice categories. The number of nominations varies each year despite increased outreach efforts each year so it is difficult to identify specific reasons for the variation.

3. ***How was program success measured?***

Success was measured by the quantity and quality of the nominations.

President's Pro Bono Service Awards

The total number of nominations received for the President's Pro Bono Service Awards was 27 (including 4 individuals who were nominated in 2 categories each). In 2006, 41 nominations were received and 29 in 2007. Once again, the nominees were outstanding and very "competitive", especially in the large law firm category. With respect to gender and ethnicity, the pool could have been more diverse.

Loren Miller Legal Services Award

The total number of nominations received was 9, two more than in 2006. The quality of the nominees also remained high.

4. ***What type of information has been presented related to the performance measures?***

Both quantitative and qualitative information.

5. ***What additional information is needed and when can that information feasibly be provided?***

Not applicable.

6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

Historically the corporate category has had few or no nominations and a long term strategy is needed to cultivate corporate pro bono. Also, IOLTA programs need to be reminded about nominating their emeritus attorneys. Staff and SCDLS members feel that it was a fluke that no nominations were submitted because this category traditionally has had many strong nominations. Members will modify their outreach accordingly to address shortfalls in 2007.

EDUCATION

1. ***How did the activities of your committee further completion of your committee's charge?***

- Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
- Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

Annual Meeting (September 27-30): 4 programs were produced:

- Fair Housing and Disability Discrimination: New Issues and Hot Topics
- Attorney A La Carte: How To Use the New Limited Scope Rules and Forms in Civil Litigation
- The Special Education Explosion: Crafting a Successful Practice
- Estate Planning: Not Just for the Wealthy

Please note that an additional training on unbundling for trainers was held on March 10 (see Moderate Income section below for more information)

3. ***How was program success measured?***
Success was measured by the number of educational programs produced and/or co-sponsored, positive comments from evaluation forms completed by attendees, positive comments by SCDLS members who attended and/or participated in the program, and number of attendees.
4. ***What type of information has been presented related to the performance measures?***
Quantitative and qualitative information presented.
5. ***What additional information is needed and when can that information feasibly be provided?***
No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
Consider future training collaborations with the Legal Aid Association of California.

LEGISLATION

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Serve as a resource to the Board of Governors in legal services issues of importance to the State Bar.
 - Analyze, report to the Board of Governors, and comment where requested by the Board of Governors or the Executive Director, on proposed court rules or legislation directly relating to or impacting the delivery of legal services to poor and middle-income individuals in California.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***

SCDLS provided written comments and/or analyses on the following matters that were referred by legislative counsel—
 - Submitted substantial comments on Judicial Council's proposal regarding Waiver of Court Fees and Costs (repeal Gov. Code, § 68511.3; replace with Gov. Code, §§ 68630.010–68630.100 (new article 6 of title 8, chapter 2))
 - Submitted comments for the Judicial Council 2007 Winter Cycle:
 - 1) W07-04: Confidential CLETS Information (Civil Harassment)
 - 2) W07-06: Professional Guardian and Conservator Reporting Forms
 - 3) W07-07: Instructions for Starting a Probate Guardianship and for Serving Documents at the Beginning of the Case.
 - Submitted comments for the Judicial Council 2007 Spring Cycle:
 - 1) SPR07-10: Small Claims Interpreter Instructions
 - 2) SPR07-14: Interpreter's Duties: Form to Assist Noncertified and Nonregistered Court Interpreters
 - 3) SPR07-23: Public Access to Electronic Records: Records in Proceedings to Prevent Elder or Dependent Adult Abuse or Workplace Violence
 - 4) SPR07-26: Family Law: Forms to Assist in Completing Dissolutions
 - 5) SPR07-27: Family Law: Child Custody Information Sheet
 - 6) SPR07-35: Judicial Administration: Court Self-Help Center

3. ***How was program success measured?***
SCDLS responded to all legislative referrals in a timely and thorough manner.
4. ***What type of information has been presented related to the performance measures?***
Not applicable.
5. ***What additional information is needed and when can that information feasibly be provided?***
No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
No changes anticipated.

MODERATE INCOME

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals
 - Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
The subcommittee continued to collect information about various moderate income delivery systems as part of the implementation of recommendations 25, 26 and 27 of the Jones Report. The information is in the process of being analyzed and then will be summarized.

An unbundling training for trainers was held on March 10 at Loyola Law School. There were 25 representatives from legal services programs, lawyer referral services, and local and minority bar associations in attendance. The training was well received and it is hoped that some of the attendees will be incorporated into a follow up training at Pathways to Justice in 2008.
3. ***How was program success measured?***
Success was measured by positive comments from evaluation forms completed by attendees, positive comments by SCDLS members who attended and/or participated in the program, and number of attendees.
4. ***What type of information has been presented related to the performance measures?***
Quantitative information was provided.

PRO BONO

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
 - Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals.
 - Develop liaison relationships with other State Bar entities concerning legal services issues of importance to the State Bar

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
 - Collected organizational emergency/disaster plans that will be used to develop a comprehensive template for legal services providers
 - In July 2007 submitted comments and recommendations to expand and update the Emeritus Attorney Pro Bono Program Rules in light of the number of attorneys transitioning from the practice of law to pursue other professional interests
 - Participated in the Access to Justice Commission's Pro Bono Taskforce and in particular on the issue of pro bono reporting.

The pro bono subcommittee was comprised mostly of new members (there was a total of 11 new SCDLS members in 2007) and unfortunately suffered from loss of leadership when its chair stepped down mid-year.

3. ***How was program success measured?***

Positive comments and evaluations received from stakeholders will help measure the quality, usefulness and effectiveness of products and activities.
4. ***What type of information has been presented related to the performance measures?***

Qualitative information.
5. ***What additional information is needed and when can that information feasibly be provided?***

No additional information is needed.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***

Activities in the pro bono area are expected to rebound with the addition of new members for 2008 who have strong direct service pro bono experience, and the continued contributions of second year members who have strong large law firm pro bono backgrounds and who also have become active committee members.

PUBLICATIONS

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals.
 - Serve as a resource to the Board of Governors in legal services issues of importance to the State Bar.
 - Develop and disseminate educational materials and programs to improve the delivery of legal services to poor and middle-income individuals.
 - Develop liaison relationships with other State Bar entities concerning legal services issues of importance to the State Bar.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
 - SCDLS one-page handout was updated and distributed in hard copy (500) during the Annual Meeting and was used generally by the members for recruitment purposes.

- Materials for the March 10 unbundling training were produced in a binder for attendees.
3. ***How was program success measured?***
Not applicable.
 4. ***What type of information has been presented related to the performance measures?***
Not applicable.
 5. ***What additional information is needed and when can that information feasibly be provided?***
Not applicable.
 6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
No changes anticipated at this time.

STRATEGIC PLANNING

1. ***How did the activities of your committee further completion of your committee's charge?***
Furthers all aspects of the committee's charge.
2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
2006 accomplishments were evaluated at the end of the 2005-2006 committee year; 2007 activities and projects were prioritized; revisions were made to the 2008 Work Plan and an initial discussion about the 2009 Work Plan took place at the end of the 2006-2007 committee year.
3. ***How was program success measured?***
Tasks were completed.
4. ***What type of information has been presented related to the performance measures?***
Not applicable.
5. ***What additional information is needed and when can that information feasibly be provided?***
Not applicable.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
No changes anticipated.

OTHER

1. ***How did the activities of your committee further completion of your committee's charge?***
 - Identify, develop and support improvements in the delivery of legal services and pro bono legal assistance to poor and middle-income individuals
 - Develop liaison relationships with other State Bar entities concerning legal services issues of importance to the State Bar
 - Serve as a resource to the Board of Governors in legal services issues of importance to the State Bar

2. ***What specific measurable program accomplishments were achieved and what were not achieved and why?***
SCDLS submitted a memo to the Chair of the Diversity Pipeline Task Force regarding the need for diversity in the legal profession with respect to attorneys working at legal services and public interest law programs, and participated in a Diversity Roundtable program presented in September to diverse college students who are interested in applying to law school. SCDLS plans to continue coordinating with the new Council on Access & Fairness on this issue.
3. ***How was program success measured?***
Not applicable.
4. ***What type of information has been presented related to the performance measures?***
Not applicable.
5. ***What additional information is needed and when can that information feasibly be provided?***
Not applicable.
6. ***What changes, if any, should be made to the direction and desired outcomes related to the program?***
No changes anticipated at this time.