PRO SE PROJECT

LIST

Pro Se Project Checklist

This checklist is to help you create a court-based pro se assistance project. This checklist stems from experiences learned in California from the Family Law Facilitator's Office and the Family Law Information Center, both court-based programs, administered by the Judicial Council and the State Bar of California's Equal Access Fund's Partnership Grants, cooperative projects between legal service programs and the courts. Information from other court-based programs, including Ventura's Self-Help Center and Maricopa County's Self Help Center, is also included.

To successfully create a court-based pro se assistance project, complete each checklist, from one to six, in that order. Check the appropriate boxes on each list as you go along. Once you have completed a checklist, check the box at the top of that list and move on to the next checklist. Some checklists are easier than others and some are much more challenging. However, as you work through this process, don't give up. You have the tools needed to create a great project.

In addition to working on your checklists, make sure to read the materials which accompany each checklist. The materials will educate you on the pro se movement and share the successes, problems, traps and other interesting stories from experts in pro se issues. While the reading may be daunting, don't forget to do it.

While the ideas in this paper are focused on court-based pro se assistance projects, they may be useful for any program, such as a legal service provider or a community group, to develop it's own pro se project.

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❒ CHECKLIST 1

Get People on Board

Identify all stakeholders. Find interest within the community to create a project. Be inclusive. However, don't go too far. The group must be manageable to work together and succeed.

Stakeholders to consider:

- ❒ Bench Officers
- ❒ Court Administration
- ❒ Family Law Facilitator/Family Law Information Center
- ❒ Local Bar Association
- ❒ State Bar Association
- ❒ Law Library
- ❒ Legal Aid Programs
- ❒ Pro Bono Programs
- ❒ Local Government Offices
- ❒ Community Based Organizations

❒ Local Politicians

❒ Churches

Other: _____

_____

_____

❒ CHECKLIST 2

Ascertain the Need

Determine the need. What help do people need. Gather both anecdotal and statistical information. Have all stakeholders contribute to the conversation.

Factors to Consider:

- ❒ Case Type
- ❒ Case Complexity
- ❒ Number of Cases
- ❒ Number of Pro Se Litigants per Casetype
- ❒ Demographics of Pro Se Litigants
- ❒ Effect of Pro Se Litigants on the Courts
- ❒ Other: _____

_____

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❒ CHECKLIST 3

Secure Funding

Think broadly. How much money is really needed? Consider volunteer time, in-kind contributions, seed money, etc.

Funders to consider:

- ❒ Trial Court Funding
- ❒ Federal Funding/Congress
- ❒ Administrative Office of the Courts
- ❒ National Center for State Courts
- ❒ State Legislature
- ❒ County Grants
- ❒ Legal Services Corporation
- ❒ State Bar Trust Fund Commission
- ❒ State Bar Foundation
- ❒ Foundations

- ❒ Community Based Organizations
- ❒ Law Firms
- ❒ In-Kind Contributions
- ❒ Volunteers
- ❒ Other: _____

_____

_____

❒ CHECKLIST 4

Create/Re-create Service Delivery Methods

Determine the best way to help the pro se customer. Be flexible. As the project gains experiences, service delivery methods must be revised to better meet the need.

Potential Service Delivery Methods:

- ❒ Individual Appointments
- ❒ Workshop/Clinics
- ❒ Community Education Presentations
- ❒ Technology-based Products
- ❒ Referral System
- ❒ Hotlines
- ❒ Collaborations with other Agencies
- ❒ Alternative Dispute Resolution
- ❒ Other: _____

_____

_____

❒ CHECKLIST 5

Evaluation/Re-evaluation

Study what you are doing. Don't be afraid to discover the areas of success and areas which need improvement.

How to Evaluate:

- ❒ Collect Statistics/Data about Pro Se Usage
- ❒ Survey Pro Se Litigants
- ❒ Determine Bench Officers Satisfaction
- ❒ Survey Pro Se Center Staff
- ❒ Survey all Stakeholders
- ❒ Other: _____

  _____

  _____

What to Evaluate:

- ❒ Demographics
- ❒ What works well? What doesn't work well? Why?
- ❒ Successes/Problems?
- ❒ Funding/Sustainability

- ❒ Replicability

- ❒ Other: _____

_____

_____

PRO PER ACCESSIBILITY CHECKLIST

Do you have more than one courthouse?

How do you figure out where to go to court?

How do you figure out where to file papers?

Where are you directed when you ask for help?

Is there a place to make photocopies of your pleadings?

Is there a place where you can work quietly on your papers?

Where is your law library? What are the hours of operation?

Are there any books geared for non-attorneys in your law library?

Where is your small claims advisor service located? What are the hours of operation?

Where is your family law facilitator located? What are the hours of operation?

Are there any other self-help programs in your county? Where are they located? What are the hours of operation?

CHECKLIST

IMPLEMENTATION OF SELF HELP CENTER

The following implementation steps are excerpted from the Request for Proposal issued by the State Bar's Legal Services Trust Fund Program for Partnership Grants. This list includes items that should be discussed between the partners involved in a collaborative effort to establish a self- help center.

- ❑ Plan for Ongoing Coordination between Partners to Collaboration;
- ❑ Establish a clear distinction between parts of the delivery system;
- ❑ Clear agreement about the services to be provided, and referral protocols;
- ❑ Security - how it will be achieved and who will be responsible;
- ❑ Location and hours;
- ❑ Equipment and supplies needed by staff and volunteers;
- ❑ Shared space and related issues;
- ❑ Financial Management and Record Keeping;
- ❑ Project Continuity - following term of grant;
- ❑ Supervision, Training, and Quality Control;
- ❑ Evaluation.

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