

**LSC Annual TIG Conference
Austin, TX**

**Opening Remarks
by
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I am pleased to welcome all of you to the eighth Annual Legal Services Corporation Technology Initiative Grants Conference—the only technology conference created just for you—legal services providers! This is another sold out conference and our biggest ever TIG event with 140 attendees. In addition to the 36 TIG recipients required to attend the conference, we have 54 additional techies, lawyers, and executive directors in attendance. We also have a wonderful slate of presenters. We are pleased to be here again at the Hilton Garden Inn. Emma Fitzgerald and the other hotel staff have an excellent record of service for this conference, accommodating our larger than normal conference crowd.

To those of you who are representing recipients of new 2007 TIG grants, congratulations on submitting excellent proposals that were selected for funding from among very stiff competition. The LSC grant reflects our investment in your success. Please call on our TIG staff or any of us if there is anything we can do to help. To those of you whose programs are paying for you to come to this conference, we appreciate your continuing dedication to our TIG efforts, which you show by your willingness to work and learn and share your experiences with us this week. I hope and fully expect that your investment of time and resources will be richly rewarded. I offer a special welcome and thanks to those of you who are participating as trainers. In past years, you and previous trainers have made these conferences most helpful and rewarding. Also, I want to take a moment to welcome those of you attending the Lawyer Track at the TIG conference. This addition was piloted last year, and we heard from you that the sessions for lawyers were indeed useful and very much appreciated.

All three of our tracks, the Lawyer, Management/Technology and Website Tracks, are designed to present you with the technology information you want and need. In addition, note that one of the Saturday morning plenary sessions is a tech tools showcase with demonstrations of many of the latest technology innovations used by legal service providers.

This year it was decided to have a pre-conference on Plain Language Forms, where 18 jurisdictions were represented. I have been hearing how well done it was and how significant it was to have so many court representatives involved.

I hope this year's conference will prove to be as educational (and enjoyable) as past conferences and that all the attendees will leave energized and inspired.

Let me begin by informing you that the 2008 competition for Technology Initiative Grants is underway. The Request for Proposals for the Letters of Intent is available for downloading from our website, and the deadline to submit a Letter of Intent is Friday, February

15, 2008. After a thorough internal review by TIG staff and senior management, LSC will make a decision about who to solicit full applications from by March 14, 2008. Those invited to submit applications for the upcoming grant cycle will then have until May 2, 2008 to complete these applications online. LSC will announce 2008 grant awards in September.

Last September, LSC announced TIG awards totaling 2.4 million dollars for the 2007 grant cycle. The State Justice Institute again provided matching funds, amounting to 321,000 dollars for seven joint projects. In the overall grant cycle, LSC received 71 Letters of Intent and invited 55 proposals to complete full applications. Out of that pool TIG funded 38 grants, broadly categorized in the following manner:

Pro Se	\$1,373,003	56.27%
Website	\$383,500	15.72%
Technical Assistance	\$321,626	13.18%
Infrastructure	\$310,710	12.73%
Intake	\$51,178	2.10%

We continue to be impressed each year with the increasing quality of the applications submitted by you and your programs and we expect to again face the difficult prospect of selecting just a few ideas out of so many creative and innovative proposed solutions.

TIG News Updates

Before describing some of the 2007 grant highlights, I would first like to share the status of an exciting development announced at last year's conference.

LSC's Google Adwords Campaign continues to direct more users of Google to LSC programs. A search for "free legal aid" is likely to result in a webpage with a prominent ad link to LSC. The link sends users to an LSC page that helps them locate LSC programs serving their area. As you may recall, Google awarded LSC a grant, valued at \$10,000 per month, to participate in their program. In a typical month, on average about 13,000 users click through to the LSC pages that list our programs. TIG staff continues to work on refining the campaign so that more users find their way to our programs.

Examples of TIG Grants Awarded in 2007

I'd like to highlight now a few of the grants we funded in 2007.

LSC is involved in two initiatives to help LSC eligible clients take advantage of the Earned Income Taxpayer Credit (EITC) program. The EITC greatly improves the economic conditions and status of poor Americans. Since its creation in 1975, it has grown to become the nation's largest antipoverty program, lifting more families and children out of poverty than any other government program. Despite the dramatic impact the EITC can have on low-income families, 15 to 25 percent of those eligible fail to claim the credit. According to a study of the Association of Community Organizations for Reform Now, up to 12 billion EITC dollars are unclaimed.

You may already be familiar with the Internet-based I-CAN! E-File program developed by the Legal Aid Society of Orange County in 2002 with TIG funding. This empowering self-help tool enables low-income workers to file federal returns and state returns in California, Michigan, Montana, New York, and Pennsylvania free of charge while claiming the EITC. The program reports that since its inception, it has returned more than 17.4 million to low-income taxpayers across the nation. With a 2007 grant, the Legal Aid Society of Orange County in California is updating the I-CAN! E-File templates and will conduct outreach activities in Texas and on the national level promoting I-CAN! E-File.

The second project is a National EITC Toll-Free phone number that has just become operational. The phone number is 1-888-4-EITC-4-U, or 1-888-434-8248. This service, also made possible through a TIG grant to the Legal Aid Society of Orange County, will help reach millions of potential beneficiaries, including many not served by I-CAN! because they lack access to a computer or find the I-CAN program too complex. The phone line's recorded message will help the caller determine eligibility and then ask for the caller's zip code. Based on the caller's location, the EITC phone line will then provide a list of free local tax assistance agencies and phone numbers to reach them. Agencies listed in the database include the Volunteer Income Tax Assistance programs, United Ways, which have been certified as qualified providers by the IRS, and legal services programs with the EITC in their service plans.

The National EITC toll-free number will only be effective if eligible families know about it and use it. Very shortly we will be sending a memo to all programs about this valuable resource so that they can inform their client communities. The phone number, again, is 1-888-4-EITC-4-U or 1-888-434-8248.

The Atlanta Legal Aid Society will use a 2007 grant to help Spanish-speaking clients who need family law forms. The office will develop and disseminate family law forms in Spanish using the A2J user interface and HotDocs Template program. The Superior Courts of Gwinnett and Cobb Counties are collaborating with the Atlanta office on this grant.

In Louisiana, the Capital Area Legal Services Corporation received a grant to use technology proven in Alabama to reconfigure the hotline/intake system developed as part of the response to Hurricane Katrina. With the new system, the renamed Louisiana Civil Justice Center will be able to address a broader range of legal issues and collaborate with all LSC-funded programs in the state.

Support for the development of technological expertise within the legal services community continues with the 2007 round. Grants to fund expert circuit riders, support for Web-conferencing tools, continued funding for the Legal Services National Technology Assistance Project, and the fostering of peer-to-peer networks between experienced technologists and new members of the community ensure the spread of knowledge and expertise, share "lessons learned," and help to establish and implement best practices.

Examples of TIG Projects that are Replicable

One of our strategies in the TIG program has been to leverage our limited funding by supporting projects that can be replicated around the country at a reduced cost. The existing

network of statewide websites is an example of successfully leveraging a standard product—the two website templates—to contain ongoing development costs. In 2006 we created a grant category specifically focused on funding proposals that were replications of existing TIG projects.

In 2007, from within that grant category, we awarded a grant to Utah Legal Services to add a “wiki” to their website to manage their Domestic Law Manual, and another grant to Legal Services of North Florida to evaluate the use of web-based tools and their potential to increase private attorney involvement.

We are continuing to encourage expanded use of both the HotDocs and the A2J software that allow programs to build on document assembly work done in other states by sharing forms and other development work already completed. While each form is unique and may vary from state to state or even within a state, many forms share a number of common elements. Legal services offices in Idaho, New York, Washington, Wyoming, Kentucky, Maine, Georgia, and Iowa successfully proposed to adapt document assembly forms created in other states for local use. The grant to Legal Assistance of Western New York, part of a joint project with the State Justice Institute, supports the development of a family law starter kit with automated forms other legal aid providers can use. The office plans to tailor these and other forms to New York requirements using A2J and HotDocs. Iowa Legal Aid plans to take the use of these tools a step further by creating a diagnostic tool using A2J and HotDocs to categorize and match family law problems with sources of help within the state. If successful, this project could be a model for the rest of the country.

These TIG-funded products and other innovations are free or available at a low cost to any program. Nonetheless, we still find that not all programs embrace these tools. We want you to tell us what we at LSC can do to work with your program’s leadership to see that these projects become a priority. I encourage you to attend the demonstration of these tools and become familiar with them during the Tech Tool Showcase on Saturday morning. Spend some time thinking about what it would take to get your program to embrace these kinds of tools and to integrate them into daily practice. Talk with any of us here at the conference, or once you return home, and let us know what more we can do to see that all the tools the technology community develops are fully utilized.

Technology Strategic Plan

As I mentioned last year, LSC has begun to develop a strategic vision for LSC’s technology investments as stated in our strategic directions. In September 2007, LSC hosted a Technology Strategic Planning Conference with technology experts from private law firms, foundations, IOLTA programs, LSC grantees, the judiciary, and academia. The participants discussed the minimum technology requirements that they thought would be appropriate for LSC to require of grantees’ infrastructure technology. A significant part of LSC’s Strategic Plan is the identification of technology capacities that a legal aid law office should have available today, either in its own program, through outsourcing, or through services from a partner in its access to justice community.

We have recently requested further input on the plan from a select group of executive directors and expect their responses by February 1. After considering their comments, making

any appropriate changes, and after presenting it to the LSC Board for further discussion, LSC will disseminate the final document to all programs. The final document will include links to useful websites for technology development. Once the document is disseminated, we plan to assist grantees with those minimum technology expectations that will be required through program visits, technical assistance, and through the general field grant application and renewal process.

Evaluation

At the LSC Board meeting last weekend, we presented a summary of the comprehensive evaluation report of TIG's grantmaking from its inception in 2000 to 2005. The evaluation was undertaken more than a year ago to identify the extent to which and the ways that TIG has increased the client community's access to the justice system and enabled LSC grantees to serve their clients more effectively and efficiently. I would like to share with you some of the findings.

The comprehensive analysis of the TIG program provides evidence of the cumulative benefits technology has had on LSC grantees. In particular, it supports the continued development of technology in the following four areas: in statewide websites; in automated court forms and assistance for people to more effectively represent themselves; in intake and case management systems; and in technology infrastructure.

Websites: TIG grants created a network of statewide websites across the country. These websites have clearly increased access of low-income individuals to state justice systems, and they improve the quality and effectiveness of services provided by grantees and *pro bono* attorneys. The two TIG-funded website templates helped prompt the proliferation of websites across the country. At TIG's conception in 2000, three states had websites. Today there are websites for all fifty states, the District of Columbia, and four U.S. territories.

Surveys indicate that over three-fourths of users rate the website information easy or very easy to find, and about 90 percent say the information is easy or very easy to understand and that they will use the site again and recommend it to others. And 60 percent of advocates say the websites enable them to represent their clients more effectively.

Pro Se: TIG *pro se* initiatives enable low income people to more effectively represent themselves. The HotDocs and I-CAN! automated document assembly programs garner praise in communities where they are offered. Users find them easy to use and helpful, and judges and courts report that they help *pro se* applicants prepare better pleadings. (Users of I-CAN! E-File also report that the system is useful and easy to use.) Usage data from the HotDocs National Server indicate that as of July 2007, 28 states had at least one template on the server and that the total number of documents reached nearly 112,000.

Assisted *pro se* projects help self-represented litigants overcome a range of access barriers. Multimedia materials enable people with limited literacy, limited English proficiency, and a lack of experience with computers and the Internet to more effectively and easily complete court forms. And on-site personal assistance is available to self-help litigants in a range of settings. For example, Georgia brings computers, staff, and Internet access to outreach sites. In Alaska self-help litigants can complete court forms at computers at courthouses, and in Ohio

access can be had at domestic violence shelters, prosecutors' offices and legal aid offices. In the projects examined for the report, the availability of this assistance— provided by court personnel, shelter staff, legal aid and prosecutor staff—was deemed very helpful by the users.

Intake and Case Management Systems: TIG-funded intake and case management systems have significantly improved clients' access to services, increased grantees' advice and brief services, enhanced programs' efficiency and effectiveness, and increased the amount of full representation. The Virginia Legal Aid Society doubled the number of clients served in the year after it implemented its new centralized hotline/intake unit. The number of service requests handled by the Bay Area Legal Services in California increased 71 percent in the first two years that its Legal Advice Line was in operation, even while the staff time devoted to intake, advice and brief service during this period fell 30 percent.

New intake and case management systems have enabled programs to increase the amount of extended services provided to clients. Montana Legal Services Association increased the number of extended service cases by 37 percent at the same time that the number of staff handling these cases fell nearly 25 percent.

Technology infrastructure: TIG infrastructure grants to individual programs have enabled those grantees to obtain and implement the basic technologies required to enhance their effectiveness and efficiency of their operations. National infrastructure grants have created technological tools that have the capacity to improve the effectiveness of all LSC grants. Projects include LStech, a national online portal on technology issues and topics for the legal services community; LS-NTAP, which provides technical assistance and technology training free to our programs, reaching 1,144 attendees in 2007; and LegalMeetings, an online meeting and conference center, on which our programs conducted more than 2,000 meetings last year.

The TIG program has helped transform LSC grantees' use of technology. Statewide websites provide high-quality legal information in every state; nearly all states have fully developed materials for clients and most are now developing extensive materials for advocates and *pro bono* attorneys. Production of useful *pro se* online forms is rapidly spreading throughout the country. New intake and CMSs have significantly increased clients' access to services. And programs have improved their overall quality and effectiveness by transforming their technological infrastructure.

We credit much of TIG's success to you, our LSC grantee partners, and we look forward to continuing joint efforts to extend the network of staff in legal services offices across the country who are increasingly adept at using technology to deliver high-quality legal services as effectively and efficiently as possible.

Commitment and Funding Challenge

The effective use of technology has been one of the most important tools LSC has used to increase access to legal advice and information. Technology has also significantly changed how the legal services community functions. And since the beginning of the Technology Initiative Grants program in 2000, LSC has used these grants for projects that have improved grantees' effectiveness and efficiency in providing high quality legal services. As I have said in many

other settings, the TIG program has been an essential tool and effective model for expanding access to justice.

In December, Congress passed and the President signed the "omnibus" appropriations act which provides funding for the majority of the Federal government for FY 2008. The act included 350.5 million dollars for the Legal Services Corporation. While this was a slight increase over LSC's FY 2007 budget of 348.6 million dollars, it was a significant decrease from what the House and Senate recommended earlier in the year. The decrease was part of a 22 billion dollar cut in discretionary spending that Congressional appropriators made in order to avoid a Presidential veto. And, in fact, LSC fared better than most other non-Cabinet agencies in the Commerce, Justice, Science, and Related Agencies portion of the bill. The final figure for technology initiatives in the appropriation was equal to the amount from the year before—2.1 million dollars.

I want to take this opportunity to reaffirm LSC's commitment to the TIG program and to securing an increase in TIG funding. The LSC Board has again requested 5 million dollars in the 2009 Budget Request to Congress, and LSC will be working hard to persuade Congress to support the TIG program. We are planning to transmit LSC's budget to Congress this week, in fact. Soon after, we will begin meeting with members of Congress and their staff to persuade them of the need for the increase.

I will again ask you for help in documenting the success of the TIG program. We need your success stories about TIG. Some we know about, for example: the millions returned to low-income individuals through the Earned Income Credit program, the increase in brief services provided to clients with new intake systems, the *pro se* individuals who got help using a document assembly system.

But we need more stories, and this conference is the best time to tell them to us. One of the LSC staff here, Sean Driscoll of the Government Relations and Public Affairs office, uses these stories to prepare information for Congress and for the bi-monthly LSC Updates. In addition to the statistical information provided through the TIG evaluations that provide critical information quantifying the scope and breadth of the work we do, the success stories of individuals help inspire Congress. We need this information to help us tell our story to Congress and to help Congress identify and personalize what technology has been able to achieve. Talk to Sean or any of the TIG staff or email Sean after the conference. Information and input from the front lines is critical to our success in increasing TIG funding.

Conclusion

This conference is an excellent opportunity for us to advance our efforts to use technology to expand access to the justice system and to high quality legal information and advice. During these three days, we will be able to share our ideas about how to improve the TIG program, receive professional training on different IT products, and to hear stories from the field that demonstrate how technology is helping reach clients who we would otherwise not have been able to assist. I am sure that as a result of this gathering we will improve our use of technology to expand access to justice and perhaps come up with new ideas for the even more effective use of technology to make our programs most efficient in their delivery of high quality legal services.

I would like to especially thank and acknowledge the LSC TIG staff members who have worked diligently to put this conference together, Joyce Raby and Glenn Rawdon. Thanks also go to Arthur Ford, our newest member of the TIG staff, who joined LSC in the Fall; to Bristow Hardin, who conducted the evaluation; and to Mike Genz, who is not here because he is recovering from a bad fall. Their dedicated and creative efforts keep TIG going strong. And to Tillie Lacayo, Guy Lescault, and Cheryl Nolan, program counsel for OPP, for their contributions. Of course I want to thank Karen Sarjeant, Vice President of Programs and Compliance, who is responsible for the overall supervision of the TIG program.

Thank you all for participating in the conference and for your efforts in developing creative and new ways to use technology to provide greater access to justice for low-income Americans. I look forward to continuing our important and exciting work together.