

**Legal Services Corporation  
Technology Initiative Grant Program (TIG)  
Renewal (Second) Web Site Grant Narrative Final Report**

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## **I. Project Goals**

The Indiana Legal Services' Web site has more than two hundred articles in the public library that were developed by ILS staff members. Our initial assessment found these items to be an extremely positive aspect of our web presence. One of our goals for our renewal period was to continue adding to our public library content.

Recognizing that we concentrated our initial efforts on the public side, another goal was to increase the content provided on the password-protected area. Again, we sought to use items provided by our staff members. One note of concern for the staff was the inclusion of specific work product that may be seen by pro bono attorneys with access to our site. Some attorneys who volunteer for pro bono service maintain a private practice that includes individuals and corporations, for example apartment complex owner and/or managers, that could potentially become opposing parties in our litigation. Our attorneys were concerned that if their work product, even redacted, were available to pro bono attorneys, these attorneys may potentially use this information in a future (non-pro bono case) to the detriment of our clients. Therefore a goal of this period was to develop a solution to this issue that would allow for the staff to provide content without fear of compromise.

The ILS staff has historically used Yahoo Groups as the conduit for their discussion forums. Our goal was to build the Interest Areas as the alternate entry point with the aim to transition away from Yahoo.

A decision to enhance our "Find Legal Help" section (the online public legal reference point), to include all local bar presidents was made, not based upon an assessment of our first year results, but rather because of the significant number of potential clients who cannot receive legal service assistance either due to our limited resources or their income status. In Indiana, the local bar presidents are encourage to provide referral information.

Response to the web has been extremely positive. One challenge is to alert as many people as possible to its existence and get them to continue to use the site even after the outreach sessions.

## **II. Web Site Description**

Indiana Legal Services initial intent was to use the ProBono.Net template. Our staff complement during our planning phase included a number of technically proficient personnel who endorsed using a more flexible template. Because of this, we opted to switch to the open source option supported by Kaivo. The ability to adapt the site to fit our program's needs appealed to us, as did the lower cost and potential for growth. Prior to the site going live, we had two staff members (both attorneys), a full-time AmeriCorps volunteer, the Technology Director, and a host of technology-based work-study students poised to support the web development.

As the date of our launch, March 2003, neared, a few things changed. First, the Web site project Director was placed on active duty three months before our launch. Subsequently, the work-study support base was shifted to other duties and the Technology Director also spent less time with this project. The entire final preparation was left with one part-time attorney and the AmeriCorps member. These two individuals did an outstanding job of bringing together our content and finalizing our Web site format.

Changing our platform to the open source option required us to also develop our own content format. These delays actually helped us develop the actual content. While we spent time figuring out how the system would look, we reduced the amount of time we had to draft what we actually wanted on the site so we started with what we had in-house: pamphlets and brochures. The web staff took the brochures that we regularly printed, distributed them to willing staff members for update and review and then started typing them in the DTML format for the web. We started with approximately one hundred topics but realized there were sub-areas that we needed information for our users. Following the same question-and-answer format, the web staff developed a number of additional articles as well as asking the staff, once again for additional support. By the time of our launch we had loaded more than 150 articles. Since this time we have increased this number to our current total of 320, including translations of ninety percent of our English articles into Spanish.

Our public content is partitioned into ten topic areas and two brochure sections (English and Spanish). The ten areas are Family Issues, Government Programs, Health and Medical Matters, Housing, Jobs, Non-Citizens, Our Legal System, Seniors, Students, and Your Money and You. The majority of these areas are a reflection of our staff attorney's areas of expertise. Those topics that are not often part of our casework, such as education, do not have nearly the article content that our 'popular' casework topics, such as family law or consumer matters, does.

Most of Indiana is extremely rural and lacks many high-speed connectivity outlets. Public Internet access points are often limited to libraries that can still be found with dial-up connections. This lack of connectivity is not limited to our public locations. Many private attorneys still rely on their Selectrics and not necessarily their CPU's. Even those who are able to access the Internet with something other than their telephone lines are often not technologically savvy. The Indiana Supreme Court has developed a Pro Bono Commission to manage the distribution of all pro bono cases. To allow for local control and support, the state has been divided into fourteen districts, each managed by a full-time administrator with the support of a local member of the judiciary and board of directors. It is with the input of these district administrators that ILS has developed its approach to online support for pro bono activities. The

inclusion of multimedia for the public would not be practical at this time. ILS does not have the internal resources to support this and, most importantly, many of our clients do not have the capability to take advantage of these wider bandwidth offerings. This same type of reasoning has been used to limit our pro bono support to documents at this time.

We have placed three HotDocs forms on the public side of our site. When the idea of online pro se forms was initially presented to some of our partners, such as the court clerks or some of state's judicial administration team, there was deep concern. Questions of whether this constituted the unauthorized practice of law or, in the alternate, established an attorney/client relationship were raised quite often in conversation. Much has changed since our initial theoretical discussions to implementation, not the least of which is the significant rise in pro se petitions to the courts. To combat the concerns of liberally providing forms that could possibly take business away from the private bar, we placed the links to the NPADO server within articles that related to the specific form. For example, to reach our Motion for Continuance, the user must read an article about what a Motion for Continuance is, when someone can request one and what happens if it is (or is not) granted. Only at the end of the article is the link to the form. Even with this rather cumbersome approach, during 2007 we recorded 584 assembled documents. Our initial HotDocs forms included the Continuance noted above, Notice of Intent to Change Residence, and Petition to Modify Child Support. We removed the Notice of Intent to Change Residence due to a substantial change in the law that invalidated our form. Although we have chosen not to use the A2J format, we have included the ICAN! link on our home page. Subsequent to our placement of the ICAN! tax assistance link, ILS has established a tax clinic to assist Hoosiers with Federal tax appeals.

The ILS case management system, LegalFiles, contains a desktop version of HotDocs. Given the complexity of building NPADO supported forms, the reluctance of pro bono attorneys to use the site and the staff's ability to create and maintain forms within our LMS, we have not published forms for the pro bono attorney. Currently though, we are developing divorce forms that can be adjusted for either the pro se or the pro bono attorney. These are still in development and we project to have them published within then next quarter.

Development and maintenance of content are centralized with the web project director. The functions of developing the web format and gathering content were consolidated with the web program staff. And we have maintained that approach. Staff and pro bono administrators are regularly sought out for additional content. Whatever is provided is then given to a staff subject matter expert (SME) to review and approve. Only after this is the item placed on the public side. Our rules for adding to the private side are a bit more flexible. We encourage everyone to provide content (i.e. pleadings, training outline, letters, work product materials, etc.). Redacted versions are placed on the private side, noting the author and date along with a brief abstract/commentary.

We have conducted usability tests with staff, social service personnel, and client-eligible community members in a variety of ways. Some have been more formal, requesting that the user attempt to locate specific items on our site and then rating the ease of use and understanding of the materials. We conducted a real-world user test when we visited the women's shelter and had the residents use the HotDocs divorce program. Annually, we visit each of the ILS offices and review the various sections of the public and private sites and ask for suggestions for improvement as well as additional content. During our semi-annual client board member training, we review the Web site, and again request input for improvement. We have made a concerted effort to reach the social service providers, targeting librarians. We conducted outreach to the statewide librarians meeting as well as more regional meetings and even local libraries.

### **III. Achievements to date**

The Indiana Legal Services Web site maintains a significant quantity of locally generated content for the public that is written at a fifth grade reading level in a question and answer format. Although our staff has provided the bulk of the articles, we have requested, and received, articles from a few outside sources, such as private law firms and a state agency. Our resource count for the public library is at 320. These items were primarily developed first in English but we had volunteer court certified interpreters translate the bulk of our articles into Spanish. We are extremely proud of our efforts to develop a Web site that is targeted to our local population. We do augment our local articles with a considerable number of links (according to our resource count, we currently list 963). We achieved the stated goal of increasing our public library content during this period.

Maintaining all of our brochures on the Web site has also been a significant benefit to both ILS and our users. Historically, ILS received a small grant, less than \$5,000, to update, copy and distribute our brochures to various offices throughout the state. This resulted in our offices and well as social service agencies receiving brochures based upon what we thought they needed, not what they actually required. The change to posting all 117 brochures, 56 in Spanish, 61 in English as PDFs on our site allows users to download and print exactly the content their clients need. We reported during the last MSR a total of 70,000 downloads of brochures. This number does not take into consideration multiple copies and only represents a one-time print request.

Another goal for the public side was to include local bar presidents' information on our "Find Legal Help" section. This was accomplished through the assistance of the Indiana State Bar Association. Starting during the renewal period, we added all local bar president information, including county bar associations as well as specialized bar programs. Based upon the feedback from the bar presidents, or rather past bar presidents who would like their name removed, users of the Web site are contacting these people as an alternative to pro bono/legal service support. In addition to providing all legal service program information, not just Indiana Legal Services, on our "Find Legal Help" section, we have also added a link to the 211 program. This telephone based program allows a caller to locate all social service support in her area. The link we have included on our site is the Internet version of this database.

We were determined to increase our content on the password-protected area while addressing the staff's concern about proprietary interest in their work product. The private side of the web includes the standard library and an additional area directed primarily at ILS staff and board members. This latter section requires an additional approval by the administrator and includes information not of interest to pro bono attorneys. Administrative items such as our expenditures, reimbursement forms, insurance forms, evaluation forms and leave status as well as client related matters such as the legal work management manual, our client retainer, and senior attorney policy are placed within the ILS section.

We initially sought to increase our library assets on the private side. We had a corps group of senior attorneys provide a substantial number of pleadings to the various sub-categories (which mirror the ten noted on our public library). To further increase this number, appeals for more materials are regularly made, either during monthly roundtable discussions, through the Yahoo roundtable messages or in person during office visits. These requests were often ignored but we were learned that this was due primarily to a fear that the individual pleadings would not be "good enough"; this attitude was especially true for our more junior attorneys. It seems that this issue is not as important to our digital native employees who are very willing to provide any

document they have generated. Our current resource count displays a total of 191 items in our private document library, many of these are .rtf versions of pleadings, but some senior staff attorneys have augmented the court documents with outlines of CLE courses they have conducted.

We satisfied the concerns of staff who provided what they considered excellent pleadings that could potentially be mishandled by pro bono attorneys. We have added some topical information that would normally be placed within the library to our ILS case/client area. Although this appeased the staff members, we are confident that this will be a short-term solution since the many (over ninety) items are not included in our search function. The number of pro bono attorneys who use the system is minimal and will likely not increase significantly in the near future. The initial concerns of the staff seem to be waning, while the desire to be able to find more information on our site increases daily. We anticipate that there will always be a few work product items that the staff would prefer to keep within the organizations, but instead of what was a wholesale approach to shield an entire type of content, the drafters are becoming much more selective in their approach to adding content to the ILS-only area.

We were excited about using the Interest Area section for our various roundtables. The ability to post documents, see priority announcements, and easily search the question archive seemed superior to the Yahoo group emails the staff received, often receiving the same note multiple times when a user cross-posted. The area worked well with only one group, the Diversity Committee, an internal committee established by the ILS Board of Directors. The group leader was able to post the training slides and training manual. Local Diversity trainers (one was appointed for each office), used the message area to alert the Board Director that the office training was complete. This cross use, between staff and board members, was the first time we have aggressively encouraged the board members to engage on the private side. All board members are provided with a password that allows them total access to the site. All financial documents prepared by the ILS Controller are posted prior to all board meetings.

The Web site was used twice during this period for major outreach events. The first event was a celebration of ILS' fortieth anniversary. The next event greatly expanded the use of the Web to support an activity. Whereas the anniversary gala was managed by an outside entity that maintained all reservations, the Web site was the primary portal for users wishing to attend ILS' Access to Justice Conference. Using the TIG conference registration format as a guide, we requested that our development software provider, eTapestry, build a registration system to account for thirty-one separate sessions with five different payment levels. The conference attendance exceeded 250 people, sixty percent of those registrations being online requests, seven of which included additional donations to ILS. Not only did the user get an automatic confirmation of their registration and their credit charge, but both the user and the conference manager were provided with the list of sessions selected. This allowed the conference manager to arrange the various workshops in spaces to accommodate the projected attendees. ILS has expanded the use of this online registration to include any CLE programs that are presented by our staff. Historically our subject matter experts would present CLEs that required attendees to send only paper checks which would be handled by a staff member supporting the event. Using the online system frees up the staff from additional accounting duties and provides the attendee with immediate confirmation of her status.

We have worked during this period to expand our presence with the state's pro bono districts and the judiciary. We have completed presentations to five of the district board of directors and have met with each of the fourteen district administrators. We have also established a discussion group for the administrators. With reference to the judiciary, we have met

repeatedly with the judicially sponsored, and led, Protection Order Committee, with the intent of posting the Protection Orders in a HotDocs format on our Web site. We continue our involvement with the judicially sponsored, and led, Pro Se Committee. This committee, implemented by the Indiana Supreme Court Chief Justice, was the first entity in the state to develop pro se forms. Despite the committee no longer having a mandate, they continued to meet and coordinate their efforts with the ILS Web site.

#### **IV. Partnerships**

As stated above, the state's Pro Se Committee has been involved with the ILS Web site from the beginning. The original intent was to use the ILS site as the primary repository for pro se assistance. The committee was instrumental in developing Indiana's only PDF pro se forms, but the committee is now in limbo and is awaiting a decision whether it is to continue. Throughout its tenure, ILS staff and board members were members of the committee. The committee helped establish some of the initial priorities for web content and was instrumental in providing a conduit to the greater judiciary alerting them to the ILS Web site.

We also work closely with the fourteen pro bono district coordinators, providing each coordinator with a series of passwords to the private side of the web. Because pro bono in Indiana is managed primarily through the district coordinators, each was given six passwords that included an "end as of" date. The same password could be provided to multiple users. The administrator controlled the password distribution. The password's duration lasted from two months through seven months from receipt to the administrator. The administrator would select the password based upon the complexity and anticipated length of the case. The ILS web director would review the password listing on a regular basis and remove those that had expired. This was done to ameliorate a concern that some private bar attorneys would continue to take advantage of the web site's data after the pro bono case was completed.

Where we once found groups dubious of the benefit of a Web site for low-income users, we now have ardent supporters. When the concept of the ILS Web site was first presented to a statewide meeting of court clerks there was deep concern that we were potentially providing legal advice without the benefit of an attorney/client relationship. There was also a concern that, through this knowledge portal, be abetting an increase in pro se actions. Now that the site is operating, this same group is a major champion of distributing ILS Web site information. Another group that had some initial doubts about the viability of the site was our own staff members. Although not an external partnership, it must be said that it is imperative for the staff to also actively support the site. We obviously rely on the staff to provide the majority of the content as well as review and update our current data. We have found that our attorneys have become true partners in this venture and independently provide content, suggestions and, most importantly, alert their clients and outreach attendees about this resource.

The public librarians have become another strong proponent for the ILS Web site. We recognized that in many of Indiana's small towns the library is in close proximity to the courthouse and that the court clerks often direct individuals to the library for answers to their legal questions. The librarians had told us that they are extremely concerned about offering legal advice and that their (known) resources were very limited. Some, but not all, libraries have legal 'forms' books. These books only provide generic outlines for various legal pleadings. Often the librarian is asked not only to locate any legal information about a specific topic but also to help draft the forms. We were invited to speak at the statewide librarians' conference where we reviewed the state's pro se web support as well as our Web site. The librarians were extremely

pleased to learn about the ILS site and since that initial meeting we have met with four local library systems (Evansville, Plymouth, South Bend, and Indianapolis). At each of these meetings we not only provide information about our site but also seek their input for enhancements.

Our partners were not directly involved with the design of our site, but they have been critical to improving our content. It was the clerks who first raised the issue of providing some type of social support link which led to us adding the 211 program listing. The librarians have been meticulous about reviewing our articles readability. Both of these groups are our primary outlets for our promotional materials. We have printed business cards that only have our web address and the statement that this site provides legal information in English and Spanish. To date we have distributed over 7,500 cards.

## **V. Factors affecting ability to implement the SWWS and accomplish project goals, and the strategies to address these challenges**

When ILS first proposed the idea of a Web site there were internal concerns about whether our client population really used the Internet and whether the funds would be better used by employing additional attorneys. This challenge has greatly disappeared as the Web site has been integrated into our daily work, for example, establishing the employee and board area on the private side.

Indiana's unique structure for managing pro bono has challenged our ability to reach the pro bono attorney. This is a wholly decentralized system that is centered upon the local needs of the clients and attorneys and each district is managed by one fulltime administrator with the support of a local board of directors, led by a judicial appointee. The technological abilities of each administrator affect her or his willingness to offer our Web site as a resource for their pro bono attorneys. Some of the administrators are tech-adverse and are reluctant to embrace new technology for themselves, let alone provide information to a third party. This attitude is not unique to the administrators as discussed above in reference to local private bar attorneys and their reliance upon typewriters instead of word processing systems. We have attempted to overcome this issue through regular meetings with the pro bono administrators. We have offered to assist them with their technology needs and have previously submitted a TIG proposal to allow us to expand our site to include the districts.

The local control attitude pervades our state and sometimes can challenge our ability to provide statewide data on our Web site. Local courts are free to exclude pro se forms, even those developed by the state's pro se committee, that do not meet the requirements of locally established rules of the court. Because our HotDocs forms are not tailored to meet the individual court rules, they too can be excluded. This issue was far more prevalent before the significant increase in pro se submissions. Court representatives are far more willing to accept our forms knowing they are legally sufficient in Indiana, if not necessarily wholly compliant with local requirements, than many of the nationally developed web-based or formbook formats that have become endemic to our courts.

We are developing a one-hour Continuing Legal Education course about the tools available to support pro bono work online. The district administrators are very supportive of this idea and the brief format will allow us to conduct the glass during local bar luncheon meetings. It is our goal to reach directly to the local attorneys, with the concurrence of the pro bono administrators and bar associations.

The limited number of staff dedicated to the our Web site can also be a challenge. The large number of articles and pleadings require review and updating on a regular basis. Often when staff attorneys provide additional content, it is not in the correct format or it has not been redacted. Just as there are so many responsibilities to maintain the web, the staff attorneys also are under a time constraint given their case work and intake requirements. We have tried to submit topical areas, for example our Housing Issues library, to our Housing Roundtable. What we learned is that if you do not select a specific person to complete the task, no one will do it. We now provide an article or two to an attorney and ask that she or he review it. Once they make their pencil changes, the solitary web employee must reenter the information. Despite our “Contact Us” page informing users that this outlet is to alert us to technical issues and not a location to request legal advice, we get a large number of legal questions. We respond to every submission, sometimes with detailed legal information, not legal advice, and sometimes with information about applying for legal assistance. In either case, these answers take time to prepare.

We now have a number of staff attorneys who are extremely comfortable with technology and appear willing to take a greater role in maintaining our Web site. We have completed one class for five staff members on the topics of web administration functions and basic Zope procedures. We anticipate these individuals will oversee some specific sub-topics on our site.

The addition of HotDocs as a resource for the public and/or private user is overwhelmingly positive. However, with such limited staffing, it is a challenge to devote the time required to create additional forms. Time away from HotDocs erodes one’s ability to remember how to construct the forms. Our resident expert is an attorney who works less than half-time who also provide direct client support. This situation has extended our development time for a number of new forms.

## **VI. Financial and in-kind support for the Web site**

All costs associated with our Web site, less the TIG funds, are borne by Indiana Legal Services. Annually, the expenses include one employee, salary and fringe benefits, outreach travel and per diem, basic office supplies and space, a web hosting charge, and occasionally some additional contract work to support the site. These costs average approximately \$53,000. The TIG renewal grant covers \$25,000 with the rest coming from Indiana Legal Services.

## **VII. Major lessons and recommendations**

The primary lesson we learned was to achieve buy-in from the staff. These attorneys, paralegals and support staff could be the primary users and ambassadors for the site. If they are able to use the site to help them in their jobs, they are likely to reference it to their clients and share this resource during outreach activities. This same type of support needs to start with the senior management. The Executive Director, Chief of Administration and other key staff, although not directly involved with clients, often deal with board members and other community leaders. It is not difficult to demonstrate the Web site to various organizations, but it is a challenge to get the audience members to start using the site on a regular basis. It is imperative to maintain a relationship with key attendees at any outreach event to ensure the continued visibility of the Web site.

If the staff recognize the Web site as a positive asset and not a drain on limited resources, they are also more likely to provide content and assist with management functions. It is critical that these web support tasks do not become overly burdensome however.

The Web site must be viewed as an integral part of the legal service office. Ensure that the URL is on the stationary and business cards. The office telephone recordings should refer to it as well. The corollary to this is remember that the Web site is not the primary reason that the office exists either. The Web site is a tool that should aid in achieving the organization's mission.

We have found strong support for including a review of the site and its usage figures to our Board of Directors as well as at a more focused client board member training session. The client board members are an excellent resource for gaining entry to outreach forums that focus on potential clients.

Remember that not everyone is a 'techie', nor do they want to become one. Make good use of the KISS principle when developing resources for the Web site. Temper those staff members who do feel themselves qualified to place excessively robust (i.e. byzantine) tools on the site to 'help' users.

Many of the challenges we faced initially have faded due to the encroachment of various technologies in our everyday life. I anticipate that this will remain true. When we first visualized a Web site to provide detailed information, other sources such as WebMD were not as popular as they are now. The idea of live chat or videos is still daunting to many in our state, yet we are planning to add these features because we believe our communities will overcome the challenges of bandwidth and connectivity.

It is important to continually add to and change the Web site. Maintaining old (outdated) information or broken links at best merely leads users away, at worst gives them incorrect information. This monitoring places a large burden on any staff, yet it needs to be done regularly. Seek the assistance of the legal service program's experts who are often using Web resources that are not yet loaded onto the program's site.

And, finally, take the time to surf and see what other legal service programs are doing and even non-legal service sites. It takes time to develop and implement new resources such as YouTube entries or Facebook pages but these are places our clients visit. If they go there, we should too.