Year in Review
2012

Standing Committee on the Delivery of Legal Services
The materials contained herein represent the opinions of the authors and editors and should not be construed to be those of either the American Bar Association or the Standing Committee on the Delivery of Legal Services unless adopted pursuant to the bylaws of the Association. Nothing contained herein is to be considered as the rendering of legal advice for specific cases, and readers are responsible for obtaining such advice from their own legal counsel. These materials and any forms and agreements herein are intended for educational and informational purposes only.
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The mission of the ABA Standing Committee on the Delivery of Legal Services is to expand access to those of moderate incomes – those who have too many assets to qualify for legal aid or pro bono services, yet lack the resources to pay for full traditional legal services.

The Committee provides resource to the organized bar, non-profit organizations, the judiciary, practitioners and law schools to advance this mission. This Year in Review is among those resources. It is designed to help stakeholders broaden their understandings of the issues, identify others who are working in parallel paths and facilitate the conversations about increased avenues of access to legal services for those just beyond the poor.

The Report annotates articles from the legal press, bar publications and reports. It provides information about court rules, orders, guidelines and ethics opinions that were adopted in 2012. The Report also details information about policies supported by the Standing Committee, models promoted through the Louis M. Brown Award for Legal Access and research into these issues. While the work of the Committee is presented, the Report highlights the work of many entities at all levels that share a dedication to improving access to justice through a wider conversation, policy decisions and programmatic advances. For further reference, the resources provided by the Committee are at www.americanbar.org/delivery.

The Committee anticipates and hopes the material in this Report will encourage and better enable those from every corner of justice system to further justice for all.

H. Ritchey Hollenbaugh
Chair
I. OUTREACH

Through the Delivery Committee website, which is routinely updated with articles, reports, ethics opinions, events and more, the Delivery Committee encourages the ABA, other bar association and legal groups to actively respond to the unmet legal needs for those of moderate income.

 Articles

February 2012

- **Free Legal Assistance Website Helps More Than 1200 (Tennessee Bar Association)**
  Article discusses OnlineTNJustice.org, a Nashville-based website that delivers free legal assistance to low-income residents. The website allows clients to request advice about specific civil legal issues, to be answered by volunteer lawyers.

March 2012

- **A La Carte Menu (Quinnipiac University School of Law)**
  Quinnipiac University School of Law Magazine published a special issue on unbundling. Articles included address preparing clients to present a case at trial, ghostwriting, handling aspects of divorce, and representing a client for a single portion of a case.

April 2012

- **Pro Bono Meets “Low Bono” at Bit BC Law Firms (Slaw)**
  Article discusses the Commercial Trial Assistance Project, which engages several Vancouver law firms in providing pro bono legal consultations and reduced-rate legal representation at trial to middle-income commercial litigants.

- **Population, Legal Aid Needs Increase in Suburbs (Chicago Daily Law Bulletin)**
  A tough economy results in an increased need for legal aid in the suburbs of Chicago, putting pressure on the courts. Article discusses how courthouse self-help centers have been used as a method to address the problem.

- **Georgetown Law’s First “Iron Tech Lawyer Competition” (Georgetown Law Press Release)**
  A competition sponsored by Georgetown Law’s Center for the Study of the Legal Profession challenges students to develop applications that solve a legal practice problem. See the competition featured on PBS Nightly Business Report here.

May 2012

- **Access to Justice on a Smartphone (IIT Chicago-Kent College of Law)**
Work begins on redesigning A2J Author® for use on a cell phone, enabling greater access to justice for self-represented litigants.

- **IIT Chicago-Kent to Develop eBook for National Cyber Clinic Pilot Program** *(IIT Chicago-Kent College of Law)*
  A project at IIT Chicago-Kent will help establish cyber clinics as a permanent part of U.S. law school education. Skills learned in such clinics will be relevant to modern law practice as it increasingly relies on technology.

- **Navigating Without a Lawyer** *(The Lawyers Weekly)*
  Article reports on the first study about the decisions of Ontario family litigants regarding whether to have a lawyer or proceed pro se.

- **Lawyers Navigate Tricky World of Unbundling** *(Law Times)*
  Canada updated its rules to give guidance to the growing number of lawyers offering unbundled services in the legal community. Article discusses some of the reactions from the legal community.

**June 2012**

- **Supreme Court Adopts Rule Authorizing Non-Lawyers to Assist in Certain Civil Legal Matters** *(Washington Courts: News and Information)*
  Article discusses the new rule adopted by the Washington Supreme Court allowing non-lawyers with certain levels of training to provide technical help on simple legal matters.

**July 2012**

- **Are Virtual Law Offices Here to Stay?** *(New York Law Journal)*
  With the advent of the virtual law office, the lawyering landscape is changing dramatically. Article discusses how some firms and lawyers use aspects of VLO technology to augment their physical offices, while others have abandoned the physical office by fully embracing the VLO model.

- **Service Delivery, Resource Allocation, and Access to Justice: Greiner and Pattanayak and the Research Imperative** *(The Yale Law Journal)*
  Article discusses how empirical research can inform service delivery, resource allocation, and access-to-justice questions.

**August 2012**

- **E-lawyers Offer Tips on Delivering Unbundled Legal Services** *(ABA Now)*
  Article summarizes the discussion had by a panel of experts on e-lawyering best practices tips at the ABA Annual Meeting on August 3rd.
• **Intelligent Office San Francisco Explains How Virtual Office Solutions Can Give Solo Attorneys and Micro-Boutique Law Firms the Competitive Edge (San Francisco Chronicle)**
  Article discusses how solo attorneys and micro-boutiques deploy virtual office strategies to enhance their professional image, improve client acquisition, and increase productivity.

• **Lawyers Turn to Tech to Power Virtual Law Firms [Infographic] (Biztech Magazine)**
  An infographic from TelAssistant demonstrates four trends reshaping the legal industry and how lawyers can benefit from these trends.

• **The Consequences of Pro Se Representation (ABA Now)**
  An increasing trend of self-representation of litigants poses serious challenges for courts. Article discusses how bar associations and courts in Illinois have developed programs to help these litigants press their cases.

• **Underserved Middle Class Could Sustain Underemployed Law Graduates (The National Law Journal)**
  While thousands of new law graduates fret about the chronic joblessness that awaits them, tens of millions of Americans need attorneys but cannot afford them. Article discusses how with prudent office economics, recent law graduates could earn decent compensation by serving lawyer-less middle class clients.

**September 2012**

• **Courts Seeing More Do-it-Yourself Divorces (Herald Tribune)**
  The fall of the housing market has fueled a surge of do-it-yourself divorces, making self-representation the new normal. Divorce apps for smart phones and online child support calculators are just the beginning of a nationwide shift in the divorce marketplace.

• **How Real Are Virtual Law Firms? (American Bar Association GP Solo)**
  Article discusses emerging virtual law firm models and available legal-specific online practice management tools that are developing and expanding regularly.

• **Law a la Carte: The Case for Unbundling Legal Services (American Bar Association GP Solo)**
  Stephanie Kimbro makes the case that law firms must find ways to adapt to the changing legal marketplace by integrating unbundling as a form of legal service delivery.

**October 2012**

• **Access to Justice Commission to Discuss Reduced-Fee Program (The Connecticut Law Tribune)**
Connecticut Judicial Branch committee considers whether the state should emulate a Washington State initiative that provides reduced-price legal help to people of moderate means.

- **Canada’s Legal System Leaves Middle Class Out* (The Star)**
  Recently published book, *Middle Income Access to Justice* discusses Canada's staggering number of individuals trying to navigate an increasingly complex civil justice system without any or adequate legal assistance.

**November 2012**

- **Federal Court Eyeing Plain-Language Internet Help for Self-Represented Litigants (The Ottawa Citizen)**
  Federal Courts in Canada plan a novel approach of providing Internet-based unofficial, non-legal, and user friendly summaries and checklists concerning legal procedural steps and the completion of legal forms.

- **New Atlanta Firm Offers Divorce a la Carte (Daily Report)**
  Article discusses how an Atlanta law firm addresses legal needs by opening Justice Café, charging $75 an hour for a la carte help in divorces and other family law matters, with no retainers up front.

- **Pro Se Divorce Forms Get Approval From Justices (Courthouse News Service)**
  The Texas Supreme Court approves divorce forms for indigent pro se litigants. The forms are approved for use in uncontested divorces that do not involve children or real property.

**December 2012**

- **You Don’t Have to Quit Lawyering to Have a Life: 5 Steps to a Virtual Practice (Forbes)**
  As many women lawyers continue to leave the legal profession due to the demanding hours of working for a law firm, virtual practices are beginning to thrive. Five steps to developing a virtual practice are presented, an approach to being a lawyer that offers better work-life balance.

**Bar Journal Articles**

**March 2012**

- **Virtual Law Practice Evolves (Washington State Bar News)**
  Virtual Law Practices are on the rise, influencing the way law firms are structured and legal services are delivered.

- **Pro Se or Pro Bono? (Tennessee Bar Journal)**
Having provided seven years of free legal forms and explanatory booklets, the Tennessee Bar Legal Services find that many of the same documents can be used for three different, but related purposes. Specifically, they find overlap between self-representation, pro bono counseling, and even limited representation by an attorney for a fee.

April 2012

- **Ghostwriting: Limited Scope Agreement are Allowed Under Pennsylvania Rules on Professional Conduct (Philadelphia Lawyer)**
  Article discusses the question of whether an attorney helping a client draft pleadings must disclose his or her representation to the other side or to a court, as was addressed in a 2011 Pennsylvania formal opinion.

May 2012

- **Rise of the Robo Form (Montana Lawyer)**
  Article discusses the rise of robo-forms and how they will decrease the amount of time a law practice needs to spend dealing with forms.

June 2012

- **ADR Tech: The Times? They are a-Changin’ (The Peacemaker)**
  Article discusses how technology is reshaping 21st century legal services and how many solo practices and small firms are taking advantage of these changes.

- **Challenges to the Profession: The “New Normal” in a Post-Recession World (Wisconsin InsideTrack)**
  Article discusses a recent report from the State Bar of Wisconsin, identifying major post-recession challenges facing the legal profession. Such challenges are leading to new competitors in the marketplace and new client expectations. In an effort to assist the delivery of legal services, State Bar leaders plan to use the report to guide future initiatives.

- **Illinois Supreme Court Announces Initiative to Ease Access to Courts (Illinois Lawyer Now)**
  The Illinois Supreme Court announced the formation of a commission to remove barriers and increase the ease of interacting with courts by those persons who can’t afford lawyers to represent their interests. The commission will be known as the Illinois Supreme Court Access to Justice Commission and is made up of 11 persons, seven of whom are appointed by the Supreme Court.

September 2012

- **Virtual Law Offices: Opening New Doors to Work-Life Balance (Wisconsin InsideTrack)**
Virtual law offices give lawyers a new way to deliver legal services and assemble legal teams. Article discusses some benefits and misconceptions of virtual law practice.

October 2012

- **Technology, Virtual Practice, Overarching Themes at Wisconsin Solo and Small Firm Conferences (Wisconsin State Bar)**
  Article discusses some conversations had by featured speakers and panelists focusing on virtual law and the future of law at the Wisconsin Solo and Small Firm Conference.

- **Unbundling Legal Services (ABA Family Advocate)**
  The ABA Family Advocate published a special issue on unbundling, which features articles defining unbundling, discussing how to make the limited-scope relationship work, a lawyer’s duty of care and liability, cooperative and collaborative practice models, and making predictions about the future of legal services.

November 2012

- **Offering Legal Services A La Carte (ABA Newsletter)**
  Article includes a summary of the discussion had by a panel of experts at the ABA CLE titled “Unbundling in the 21st Century: Growing Your Practice With Limited Scope Representation.” The panel included experts of unbundling Richard Granat, Forest Mosten, Sue Talia and Stephanie Kimbro.

**Blogs and Commentary**

April 2012

- **Mediation and the Self-Represented (Richard Zorza’s Access to Justice Blog)**
  Richard Zorza discusses mediation, self-representation and professional standards.

May 2012

- **Could Your Practice be a Virtual Success? (The Daily Record Commentary)**
  Edward Poll discusses how the internet has revolutionized the way that lawyers and clients interact.

- **LegalZoom: Where There’s Smoke, There is Often Fire (eLawyering Blog)**
  Richard Granat discusses a recently filed law suit against LegalZoom in the U.S. District Court, for breach of the Panel Agreement that it entered into. The Complaint can be downloaded [here](#).

- **MIE Journal Article on Relationship of Right to Counsel and Self-Represented Litigant Movement (Richard Zorza’s Access to Justice Blog)**
Richard Zorza discusses his article that was recently published in the Management Information Exchange Journal. A pdf of the article can be found here.

- **Paper on Regulatory Barriers to Multijurisdictional Virtual Law Firms (Virtual Law Practice)**
  Stephanie Kimbro discusses her paper, recently published in the North Carolina Journal of Law and Technology, addressing how lawyers can use innovations and technology to work with clients across the country and internationally.

- **What Does the Technology Replace? (Virtual Law Practice)**
  As we move away from paper and go digital, Stephanie Kimbro weighs in on debates about how the introduction of new technologies will restructure law firms.

- **What Limited Scope Representation Service Should You Offer? (Limited Scope Practice Blog)**
  M. Lewis Kinard discusses which services are most appropriate for limited scope representation and where to find more information.

**June 2012**

- **Bar Must Examine its Role in Adapting to Self-Represented Litigants (Law Times Speaker’s Corner)**
  University of Windsor Law Professor Julie Macfarlane discusses her study of self-represented litigants.

- **Finances for a Solo Attorney: Offering Unbundled Legal Services (Lawyerist)**
  A post on Lawyerist addresses unbundling as a way for solo attorneys to maintain a steady cash flow while offering cost-effective services for clients.

- **The Virtual Legal Market (Campbell Law Observer)**
  A post on the Campbell Law Observer discusses unbundling and virtual representation as solutions to the growing population that lacks access to full legal representation.

**July 2012**

- **Diverse Ways of Rendering Legal Services (Thoughtful Law Management)**
  David J. Bilinsky discusses how the Internet is changing the profession, allowing for greater diversity in how lawyers and clients meet, converse, interact, exchange, and collaborate.

- **Plan to Present Resolution on Unbundled Legal Services to ABA House of Delegates (Richard Zorza’s Access to Justice Blog)**
  Richard Zorza comments on the resolution in support of unbundled legal services to be presented to the ABA House of Delegates.
• **Still Haven’t Considered Incorporating Limited Scope Representation in Your Program? You Should! (ABA Center for Pro Bono Exchange)**
  The ABA Center for Pro Bono Exchange discusses a few basic principles to avoid potential pitfalls to limited scope representation and to ensure the best experience for clients and volunteer attorneys.

• **Virtual Lawyering and “Virtual Presence” under Model Rule 5.5(b)(1) (eLawyering Blog)**
  Richard Granat discusses some identified issues related to defining limits on Virtual Practice under Model Rule 5.5.

**August 2012**

• **Major News from CCJ/COSCA on Model Code of Judicial Conduct and the Self-Represented (Richard Zorza’s Access to Justice Blog)**
  Richard Zorza discusses the Resolution recently passed by the Conference of Chief Justices and the Conference of State Court Administrators.

• **Okamoto Wins NSF Grant to Develop Virtual Law Practice Platform to Train Law Students (Legal Informatics Blog)**
  Professor Karl Okamoto of Drexel University College of Law has been awarded a National Science Foundation grant to develop a virtual law practice platform for use by law students learning practice skills.

• **Stop Selling Eight-Tracks and Start Unbundling (Attorney at Work)**
  Stephanie Kimbro discusses how lawyers can adjust to the fact that DIY legal services are more and more in demand.

• **Top Tips from the “Online Resources for Self-Represented Litigants” Webinar (Pro Bono Net)**
  Pam Weisz summarizes the highlights from the Pro Bono Net/LSNTAP Community Training Series presentation that took place on August 15th.

• **Virginia Disciplinary Case on Misleading Lawyer Advertising (Virtual Law Practice)**
  Stephanie Kimbro discusses a recent disciplinary case out of Virginia addressing the issue of a lawyer's use of misleading online advertising.

**November 2012**

• **Guest Blogger Claudia Johnson on the Technological Future (Richard Zorza’s Access to Justice Blog)**
  Guest blogger, Claudia Johnson offers thoughts on the future for technology and the law.

• **Which Business Entity is Best for a Virtual Law Office? (Her Virtual Law Office)**
Rachel Rodgers discusses the unique issues that can affect the business structure for a lawyers practicing virtually.

December 2012

- **15 Technology and Legal Services Delivery Predictions for 2013 (Virtual Law Practice)**
  Stephanie Kimbro compiles a list of her top 15 predictions for the coming year that relate to virtual practice.

Reports

January 2012

- **Access to Justice in Crisis: Self-Represented Parties and the Court**
  The Central District of California Bankruptcy Court posted its annual comprehensive report on self-represented litigants. The report summarizes the nature of cases that self-represented litigants are involved in, assesses current programs serving these litigants, and identifies goals for addressing access to justice barriers.

June 2012

- **Self-Represented Litigants: Literature Review**
  The Australian Centre for Justice Innovation has released a report and literature review of self-represented litigants (SRLs) in the civil justice system in Australia and makes recommendations to improve the collection of data relating to SRLs.

November 2012

- **Writing for Self-Represented Litigants: A Guide for Maryland’s Courts and Civil Legal Service Providers**
  The Maryland Access to Justice Commission published a guide for Maryland’s courts and civil legal services providers on how to write for self-represented litigants. The guide addresses writing clearly, checking the document with a readability tool, improving readability with layout, explaining information with visual aids, accommodating people’s differences, and telling readers where they can find more help.

Court Rules and Orders

January 2012

- **Indiana Rule of Trial Procedure 3.1**
  An amendment to Indiana Supreme Court Rule of Trial Procedure 3.1 allows Indiana attorneys to make limited appearances. The rule also governs the withdrawal of representation.
March 2012

- **Alabama Supreme Court Rules of Civil Procedure 11 and 87**
  Alabama adopted new rules of civil procedure that allow attorneys to assist in the drafting of pleadings and creating expedited procedures for getting in and out of a case in a limited scope representation basis.

- **Alabama Supreme Court Rules of Professional Conduct 1.1, 1.2, 4.2, and 4.3**
  Alabama adopted new rules of professional conduct that allow for limited scope representation. The rules clarify that limited scope representation agreements must be in writing, with specific exceptions and that clients are considered unrepresented by opposing counsel unless notice is provided.

July 2012

**Tennessee Rules of Civil Procedure 5.02 and 11.01**
Changes were made to the Tennessee Supreme Court Rules of Civil Procedure to facilitate unbundling. The rules clarify the service, filing, notice and termination of limited scope representation.

September 2012

**Washington Admission to Practice Rule 28: Limited Practice Rule for Limited License Legal Technicians**
With the goal of making legal help more accessible to the public, the Washington Supreme Court adopted a rule authorizing non-lawyers to assist in certain civil legal matters.

**Ethics Opinions**

May 2012

- **Ethics Opinion No. 2012-184 (The State Bar of California Standing Committee on Professional Responsibility and Conduct)**
  California Ethics Opinion indicates that as it pertains to the use of technology, the Business and Professions Code and the Rules of Professional Conduct do not impose greater or different duties upon a VLO practitioner in operating in the cloud than they do upon an attorney practicing in a traditional law office. While an attorney may maintain a VLO in the cloud where communications with the client, the storage of and access to all information about the client's matter, are conducted solely via the internet using a third-party's secure servers, Attorney may be required to take additional steps to confirm that she is fulfilling her ethical obligations due to distinct issues raised by the hypothetical VLO and its operation.

June 2012
• **Formal Ethics Opinion CAL 2012-184 (The State Bar of California).** An ethics opinion from California addresses whether an attorney may maintain a virtual law office practice while still complying with ethical obligations.

**Events**

**April 2012**

• **Alternative Fee Arrangements (ALI-ABA CLE)**
  On April 19, 2012 ALI-ABA sponsored a continuing legal education program addressing alternative fee arrangements.

**May 2012**

• **ABA/NLADA Equal Justice Conference**
  The American Bar Association Standing Committee on Pro Bono and Public Service and the National Legal Aid and Defender Association held the annual Equal Justice Conference May 17-19th in Jacksonville, Florida.

• **Stanford Law School Speaker Series: Unbundling and the Future of Legal Service Delivery (Stanford Law School)**

• **Innovation in the Delivery of Legal Services (And How Legal Education Can Play a Role)**
  Michigan State University Law Professor, Renee Newman Knake presents a slide show addressing innovation in the delivery of legal services and how legal education can play a role. The slide show is now available online.

**June 2012**

• **Recent Developments in the Law (Kansas Law School and KU CLE)**
  Two-day continuing education program provided CLE sessions, including a session on the ethics of limited scope representation in Kansas. Clinical Professor Suzanne Valdez discussed the pilot projects that allow lawyers to provide unbundled legal services in certain types of cases.

**August 2012**

• **Delivering “Unbundled Legal Services” Over the Internet (ABA Standing Committee on the Delivery of Legal Services CLE)**
  The ABA Standing Committee on the Delivery of Legal Services offered a CLE panel discussion about delivering unbundled legal services online at the ABA annual meeting on Friday, August 3rd.
• **Delivering Unbundled Legal Services Over the Internet**
  Richard S. Granat provides a power point presentation on the topic of delivering unbundled legal services over the internet.

September 2012

• **Ethical Issues in California Pro Bono Representation (PLI CLE)**
  CLE seminar on ethical issues in California Pro Bono Representation took place on September 6, 2012 in San Francisco. Delivery models, such as limited scope representation, were discussed.

• **Libraries and Access to Justice Webinar Series (Pro Bono Net)**
  Pro Bono Net offered four national training webinars for librarians, with the goal of increasing awareness about free, online resources for people with legal needs. The webinars were recorded and made available [here](#) for those who could not attend.

• **Third Civil Justice Reform Summit (IAALS)**
  On September 20th and 21st in Denver, IAALS hosted its Third Civil Justice Reform Summit. For a full agenda of the event, click [here](#).

October 2012

• **2012 Futures Conference (The College of Law Practice Management and Georgetown Law)**
  The College of Law Practice Management and Georgetown Law hosted the 2012 Futures Conference on October 26-27 at the Georgetown Law Center.

  **2012 Law Via the Internet Conference**
  Over 300 of the world's leading advocates of open legal access across gathered for the 2012 Law Via the Internet Conference, held in the United States for the first time. The conference was held at Cornell Law School on October 7-9.

• **2012 National Lawyer Referral Workshop (ABA Standing Committee on Lawyer Referral and Information)**
  Information Service hosted a workshop in Las Vegas, NV on October 24-27, 2012 to foster peer interaction and learning on the most important programmatic and substantive issues affecting the delivery of legal service through the lawyer referral program model.

December 2012

• **Workshop on Empirical Approaches to Access to Justice (American Bar Foundation)**
  A two-day workshop on empirical approaches to access to justice was held in Chicago on December 7-8, 2012. The workshop brought together scholars and
practitioners from many perspectives to identify and explore access to justice research needs.

**Initiatives/Programs**

**May 2012**

- **Incubator Services Listserv**
  The ABA Standing Committee on the Delivery of Legal Services established a listserv in order to better coordinate law school and bar-sponsored incubators and residencies that foster the development of practices for newly admitted lawyers. Additional information can be found on the Delivery website, here.

**II. POLICY**

**Recommendations to the House of Delegates**

After reviewing recommendations before the House of Delegates, the Delivery Committee co-sponsored the following items, each of which are consistent with the Committee’s mission to expand access to justice for those of moderate income:

**2012 Midyear Meeting**

- **Resolution 111** urges entities that administer a law school test to provide appropriate accommodations for a test taker with a disability to best ensure that the exam results reflect what an exam is designed to measure and not the test taker’s disability. Action taken: Approved.
- **Resolution 113** adopts the *ABA Standards for Language Access in Courts*, dated February 2012, and urges federal and state legislative and executive branches to provide adequate funding to courts and other adjudicatory tribunals to fully implement language access services. Action taken: Approved.

**2012 Annual Meeting**

- **Resolution 106C** urges courts and community organizations to collaborate in establishing court-focused elder abuse initiatives that serve victims or potential victims of elder abuse through either a court or a court-based program or a program conducted in partnership with a court. Action taken: approved as revised.

**III. MODELS**

**Louis M. Brown Award for Legal Access**

The Louis M. Brown Award for Legal Access honors programs and projects dedicated to matching the unmet legal needs of the middle class and those of moderate incomes with lawyers who provide affordable legal information, services and representation.

The Award is presented annually to those who have made creative contributions to the delivery of legal services in ways that are exemplary and replicable. In 2012, the Delivery Committee recognized three programs.
2012 Brown Award Recipient:

**The Financial Clinic**
The Financial Clinic improves financial security for the working poor—those who fall into the wage gap—earning too much for public assistance but too little to be self sufficient. The Financial Clinic undertakes projects where financial coaches and attorneys can find customers in the best position to succeed by partnering with organizations that have already identified a strong need for financial development services. Examples include MoneyUP, a joint initiative with the United Way of New York City, where The Financial Clinic combines free tax preparation services with financial coaching and legal services; Single Stop, where The Financial Clinic complements free benefit screenings provided to the community with one-on-one financial coaching and legal services; and Greenlight, a partnership with United Way of New York City and Human Resources Administration which enhances services offered to customers through the domestic violence shelter system.

The Financial Clinic attorneys provide “Know Your Rights” workshops to better meet the needs of domestic violence survivors in shelter, in addition to providing traditional legal services. Staff attorneys represent clients in legal proceedings that involve a wide range of topics on financial issues, including consumer debt collection cases, consumer bankruptcies, resolving tax and student loan debts, and foreclosure defense.

2012 Brown Award Meritorious Recognition Recipients:

**Lantern Legal Services**
Lantern Legal Services has assisted numerous start-ups and established small business entrepreneurs by offering professional solutions for legal service across several key practice areas. Lantern Legal Services uses a virtual law office platform to provide services to its clients. It has adopted a flat-fee pricing model so that clients know the costs of the services going in. Services include entity start-ups and incorporation, trademark and patent representation. Special fees are available for non-profit entities.

In addition to these services, the firm produces an entrepreneurs’ newsletter and maintains an online library that can help educate potential clients before they go forward with their legal matters. Library materials include a due diligence checklist and FAQ’s on a range of intellectual property issues.

**Veterans Law Clinic and Project Salute**
Established in 2007, the Veterans Law Clinic, Veterans Appellate Clinic and Project Salute assist low and moderate income veterans and families with obtaining VA benefits.

The clinics provide direct representation of veterans who are within 200% of the poverty level. Project Salute provides in-person and webinar training to attorneys, conducts intakes, pairs veterans with trained attorneys, and provides ongoing support. If attorneys represent additional clients, they can charge a contingency fee based on retroactive benefits; attorneys who prevail at the Court of Appeals for Veterans Claims collect Equal Access to Justice fees.
In addition to the clinics and Project Salute, the program also conducts ongoing community-based informational sessions, provides referrals and pro se clinics regarding benefits and other legal issues, assists in setting up veterans' diversionary courts in Michigan, and provides consultation and assistance to entities interested in implementing similar programs. Mobile law offices bring services to clients, traveling to homeless shelters, Stand-Downs, rural communities and other locations to provide services (54 Michigan cities, 25 states, Washington, D.C. and Puerto Rico). The program has partnered with various entities including State Bar of Michigan, ABA Young Lawyers Division and District Courts.

Veterans assisted by the clinics and pro bono attorneys have been awarded approximately $800,000 in retroactive benefits to date, as well as ongoing monthly benefits.

IV. RESEARCH

The Self-Help Center Census

In less than 20 years, self-help centers have mushroomed around the country. In an effort to determine the ways in which these centers are helping people access legal information and services, the Delivery Committee set out to survey legal self-help centers across the country. The survey was modeled on a survey of California self-help centers conducted by Bonnie Hough, managing attorney of the Center for Families, Children and the Courts of the Administrative Office of the Courts in California.

The sample for the survey was identified by combining the use of pre-existing lists of legal self-help centers, an internet search and snowball sampling, yielding over 400 legal self-help centers in 36 jurisdictions. Questions asked about how the centers are staffed and funding, methods of assisting litigants, substantive areas in which services are provided, and descriptive data about the number and types of clients served.

Data collection will continue into the beginning of 2013 and will then be analyzed and presented in the summer. It is anticipated that the Census will enable those dedicated to improving access to justice to get a better sense of the scope, value and overall benefits of self-help centers.

STANDING COMMITTEE ON THE DELIVERY OF LEGAL SERVICES
MEMBERSHIP, 2012

1 Snowball sampling (also known as referral sampling or chain sampling) is a non-probability sampling technique that involves using existing study subjects to recruit additional subjects from among their acquaintances. In this study, we used the internet and pre-existing lists of known legal self-help centers and then asked each contact to forward the survey to any additional self-help centers they knew about.
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