Hon. Fern Fisher:
Good morning. Welcome to the Nuts & Bolts of a Successful Program or Initiative. Today we'll explore the issues regarding funding, user testing, outreach, and feedback. And we have some really great presenters from Pro Bono Net, led by Liz Keith, who's the State and National Programs Director, joined by Tim Baran, Program Director, New York Justice Initiatives, and Jeanne Ortiz-Ortiz, Senior Program Manager, all from Pro Bono Net.

Liz Keith:
Great. Wonderful. Thank you so much Judge Fisher, and to the Commission and to everybody for joining us today. I'm Liz Keith and I am the State and National Programs Director with Pro Bono Net. And really delighted to have the opportunity to participate today. I'm joined by my colleague, Jeanne Ortiz-Ortiz, our Senior Programs Manager, as well as Tim Baran, Program Director for our New York Justice Initiatives. And again, thanks so much to everybody for joining this afternoon and to the Commission for the opportunity to be here today. As Judge Fisher said, this is the "Nuts and Bolts" session, focusing on how to build and execute a successful program. And I'm going to provide a little bit of background to who Pro Bono Net is and our roadmap for the next just under an hour or so.

And we know many people here today have deep experience in this topic already and we really welcome your feedback, we welcome your comments, we welcome questions about what resonates with you or your own experience as we go through this and really want to elevate the great work of many of the programs and teams in this virtual room as well. So Pro Bono Net is a national nonprofit based in New York, and we focus on expanding access to justice by… [inaudible 00:02:05 – 00:02:06] operation that do three things: that help individuals access, understand, and exercise their rights; that help advocates and pro bono volunteers do the most good; and that support national and regional justice efforts to expand access to justice. And I'll turn it over to my colleague, Tim, to tell us a little bit more about our work here in New York State.

Tim Baran:
Awesome. Thank you, Liz. And can I just say, as a former librarian- the library, the active listening, the building partnership threads throughout this conference has been amazing. It's been, it's very, very near and dear to my heart. So, New York Justice Initiatives, it's anchored by LawHelpNY and it's the New York arm of Pro Bono Net that comprise Crime Victims Legal Help, Tenant Help NY, the LiveHelp online chat that's on LawHelpNY and several other states, including some of the pages on the New York courts website and our New York Pro Bono portal. And I can say that that so much of the information presented here, some of it devastating, like the medical debt, helps to inform us of our content roadmap. So fair warning to everyone on this call who's presented, we'll be reaching out.

I really love Danielle's advice to guard against overwhelming with too much information and presenting the journey, the process, the timelines, plain language forms, a reminder to don't turn back the clock on innovation that the pandemic supercharged three years ago. These are the kinds of things that we think a lot about and that we're working on this year. So, it's a real honor to join you on this call.

Liz Keith:
Great. Wonderful. Thank you, Tim. So, we're going to, for the next 30 minutes or so, take us through five key stages for building and launching a successful access to justice program or initiative. And we're going to go kind of round-robin style through this, providing brief snapshots of some of what we've learned about key phases like planning and initiation, project management, governance, execution, pilot testing, full-scale rollout, and monitoring and evaluation. And we'll provide some high-level themes and learning

and things to consider for each of these phases. And then we'll also provide some nuts and bolts of resources that if you're interested in going deeper into any one of these areas, these are takeaways that you can bring back to your courts, your programs, and your colleagues to hopefully spend a little bit more time on and go deeper into after this session. And again, we welcome feedback and questions throughout this process, or if there are other resources that you found particularly helpful in any one of these phases, we would love to surface those here and make sure other participants are aware of them.

So, kicking off with planning and initiation- I think there's been some interesting kind of discussions about themes touching on this already at the convening today, but when we think about project planning and initiation, what are some of the key themes and steps that we need to consider? One is just for any initiative, really regardless of its size, what is the problem or need that we're trying to address and how will we define success? Success might look different in the short term versus the long term, but that's just a really critical question to think about and make explicit at the beginning of any kickoff of any project.

And then I think we've touched on in other discussions here today as well, the need to do a needs assessment, again, to make explicit who is the target audience for this program or initiative? What are their concerns, needs and preferences? How many people do we think need this service? What data already exists that you might have ready access to or might be able to find and uncover? And what can we learn from that data? And then, really importantly, are there any other organizations in your jurisdiction already providing the service to litigants or already working on this issue? And if so, what can you learn from them? How can you engage with them and really think about how to ensure that your initiative is complimentary to or building on supporting what's in place already?

A couple of other key components of the project-planning and initiation phase is that stakeholder analysis and engagement, stepping back and thinking about what other people or groups might be impacted by or have the potential to impact the success of this project, and how can we engage and collaborate with them now at the start, whether by doing one-on-one meetings with them to really find out what they've learned and talk with them about this initiative, as well as throughout the project lifecycle. There's mechanisms for doing that, like advisory boards or stakeholder coalitions or project collaborative team meetings, but stakeholder engagement and analysis is a really important part of project initiation and planning for any kind of project that's intended to… really focusing on the justice gap, because so much of this work is complex and collaborative and really takes a village to move forward.

And stakeholders can include litigants themselves and often should include litigants themselves, might include broader community members, your court staff and colleagues, community partners, subject-matter experts, and other researchers. And then given this learning in this phase, what aspect of this issue is your program or project best suited to address? Hopefully this planning and initiation phase, which might last a month or might last several months depending on the scope of your project, will help narrow this down. Based on what's already been done, based on the resources that are available, what's the particular part of this problem that, at least in the first phase, your initiative is well-suited to tackle?

So, some practical tools for incorporating into this initiation phase can include a logic model. And a logic model is just kind of a fancy name for some fairly simple tools that can really help define and make explicit what are the resources and activities that you're going to be undertaking and putting into place and how do those connect with and impact the outcomes that you're seeking to solve? What's the through-line in those things? And we've included some model templates here from the CDC, as well as the Department of Justice's Elder Justice Initiative that I think provide a nice, high-level version of this. This can be a really great planning tool and it also can serve as the basis for your project evaluation efforts throughout your initiative.

Some sources of potential needs-assessment data would include your existing program and litigant data and feedback. What anecdotal feedback, what learning has kind of driven you to really envision this in the first place? There's some really wonderful data available through various publications that have been put out by the New York Courts Access to Justice Program and other entities. Census.gov and particularly the American Community Needs Survey has some really terrific demographic data. And then if you're developing a project that has a technology component, one really interesting new tool to take a look at is NTIA's Indicators of Broadband Need Map. This will allow you to drill down to a county level, look at what broadband penetration currently looks like within your county, and even overlay that with things like poverty level, where there's tribal lands, minority serving institutions, and a lot of other data that can help give you a rich picture of what the digital divide might look like and where there might be digital equity issues to consider if you're developing a technology enabled initiative.

And I'm seeing some great resources come through already in the chat, so thank you. And then some practical tips and tools for funding. We've included links here for resources available through the Grants and Contracts Office for court staff, that's part of the Intranet, candid.org, which is part of the Foundation Center, a really wonderful research resource for grant opportunities. And then you can also reach out to programs that have secured funding for similar projects. Can they share what they learned? Can they offer suggestions if you're applying to the same funder maybe a few years later? Is there anything they can share about what worked for them and what they learned to position their project for that funding? So, I'll turn it over to Tim for our next segment.

Tim Baran:
Thank you, Liz. And if we go to the next slide around project management, Liz has covered some of the initial gathering and scoping that you need, but generally there are three primary elements that you have in project management. One is scope, the other is the time it will take to complete, and a big one is the cost. And I think we've all been involved with projects where one of these things go a little bit haywire. And if one is affected, because these are the sort of triangulated constraints, if one is affected, the others are. So, for instance, if halfway through a project you discover that let's say an important event is taking place in a couple of weeks or another month before the scheduled launch, you're like, "Well, let me launch this two weeks before, three weeks before in order to take advantage of this."

You have to decide, when you speed up this project, if you want to increase the cost by bringing in additional help so that everything is done within the scope that you identified earlier on, or if you want to reduce cost and think about reducing scope along with that. So, these are things that are important to think about as you create a project. We'll get into to risk management in a couple of minutes, but the next slide I want to focus on a little bit, which is project governance.

A really, really important part at the beginning of any project is to identify who your team is. We talked about ... all through this conference, actually, folks have been talking about stakeholders, stakeholders not just within your organization, but outside of your organization -- consultants, funders, folks who are going to benefit from this project. Those are the stakeholders of this project. One of the things that I do want to point out amid all of this is that's critically, critically important. And anyone that I think that's gone through a project recognizes this. Who is the decision maker along the way for different elements of what you are going to develop? So, whether it be programmatic, whether it be content, whether it be technology, design, and so on, it's critically important to identify who's the decision maker. And you have to trust that person or that small group of people that serve as your consultant, your experts, and to make the decisions that can move you forward.

Because if you try to make decisions by committee as you go through this, it really is going to fail your project. A way to identify this is, I think many of you have heard of this MOCHA model. The M is for manager, followed by owner and consultant and helper and approver. And approver is what I'm talking about, someone who signs off on these key decisions. Another element that is really, really critical is communication. Communication, and I would say even further than that, transparent communication. If you're unsure if something or if a particular element is going off the rail, don't try to go and fix it by yourself. You have to communicate with the team that you've built, that you've entrusted to listen and to give feedback and to make decisions.

So, I would say at the very minimum, have weekly check-ins. That's critical. A communication tool is not emails flying back and forth. Emails are important but think about another tool like Slack or Basecamp or Asana or whatever tools you use internally or think about using or think about training folks on. Get those tools in your toolbox for this project, because you'll need to reference communication along the way as you make decisions, like, "Why did we make that decision?" or "Hey, what's the context for moving forward with this decision or this project or part of this project?" So, two things. One, key decision… If any takeaways from this around project management and project governance is identify your key decision maker and trust them. And two, communication. Transparent, consistent communication.

Next slide. I think I'll pass it over to Jeanne. No, risk assessment. Let me talk about risk assessment a little bit. I mentioned initially when we looked at the project management slide that you really do have to think about what may go wrong, what are some of the elements over the next 18 months, whatever the timeline for this development is? Many funders require that you have a timeline for development, that you have milestones along the way. So, I would say build in some extra time. I would say this is probably the most important element on here, is at the beginning of your journey or if you're mapping out this journey, building some extra time, building some extra cost to reduce the risk. Some of these other elements like evaluating each step of the way, that goes to communication. Sharing progress and challenges, that also goes to communication. But I would say the key takeaway from this slide is to build in some extra time and cost. Jeanne?

Jeanne Ortiz-Ortiz:
Okay, great. So, building on what Tim has shared, also our experience with Google and Microsoft's Outlook tools for anything related to project management has been great. They're both user-friendly and easy for collaboration. And here are a few other practical tips that have also been tried and tested. GooDocs also has many project-management templates you can use for inspiration and to organize your project tasks. Next slide. So, Tim has already named several project-management tools, and it really depends on what works for you and your team. I think Todoist is also another great tool. It's an application, but it works for project management just as well. I've found it particularly helpful for staying on track with deadlines and multiple projects. And then in my experience before starting to manage a project or initiative, I have found it helpful to anticipate and organize tasks into phases before sharing them with everyone and then sharing and refining as needed.

Also, breaking down the project into manageable tasks with deadlines and rules can help greatly for the team to stay organized and focused. And finally, this last step after the project, project debrief meetings can be beneficial for everyone to engage in because of all the things that we can learn, talk about what went well and how you can celebrate your team. It's helpful for future projects, team building, and can also help inform sustainability strategies. Next slide. Okay, next slide. So, we're on-stage number three of the process, which is pilot testing. And the goal for pilot testing should be to really get a feel for how your initiative will operate in real time and use that testing to identify potential issues or areas of improvement before you do a full-scale launch.

So as a first step, it's helpful to think about the participants of your pilot. For example, will participants be from your team, or will you need to recruit individuals specifically for that pilot? I think identifying the right participants is really important because they should represent the target audience of your initiative. And you can also get really helpful feedback. I recommend for this phase a guide to help you with pilot testing. It doesn't have to be anything formal. A bullet-point list or checklist should suffice as long as it outlines what's expected, but in my experience, creating a guide will bring structure to the pilot testing process and ensure that everyone is clear on what to expect.

The guide can also provide step-by-step instructions on what actions need to be taken and what tasks participants will need to complete. And then if the project involves the use of technology, screenshots or visuals can always help to facilitate the understanding of the process, especially if it's technology that participants are not familiar with. And then technology always gets to test before the pilot test and that will help participants focus on the task at hand rather than troubleshooting technical problems.

Next slide. And then the final step before conducting a pilot is feedback. What method or methods will you use to collect and document the feedback from the pilot? One option is to ask participants to complete feedback forms. These forms can be designed to gather specific information related to your initiative's performance and overall participant satisfaction. You can use structured questions or rating scales to streamline that feedback collection process and then analyze the responses. Another approach is to conduct interviews with the participants of the pilot and have someone take detailed notes. I think these allow for more in-depth discussions. They're also more time-consuming, but overall great to gather information that you need. But regardless of the method that you choose, I think the key part in collecting feedback is to do that in a consistent manner so that it works for when your team needs to analyze that feedback.

And one approach to do this is to schedule a post-pilot feedback session, which will give you an opportunity to convene all relevant stakeholders and review the pilot results collectively. And whoever leads that session should promote a collaborative environment that also encourages participants to share their honest opinions and suggestions for the success of your project. Next slide. And here's a very brief pilot summary from one of our initiatives called Remote Legal Connect, which enables volunteer attorneys to video-chat and share documents remotely with the pro se litigant. But just writing out what we need to do in terms of goals, format, duration, who needs test accounts, and the technology that we will use for the pilot I think can go a long way in structuring this process.

Next slide. So, I think I've covered most of this already, but I'll add that if you are hosting or organizing a feedback session remotely, for example via Zoom where you convene your team to discuss pilot results or anything else, there are many tools that can help you make that an engaging process. Google's Jamboard, for example, is very easy to use and just requires participants to have a browser, or you can always ask people to submit their thoughts via the chat and then share them verbally and you can screen share the Jamboard to visualize everyone's feedback and find patterns and make that engaging. Next slide.

Liz Keith:
So Jeanne touched on this a bit already, but again, if you're developing an initiative with any kind of technology or online content component, maybe an online registration form or workflow that people need to follow to sign up for a clinic, for example, we would recommend incorporating some user testing into that process to make sure that the tools that you designed are easy for people to access and engage with. And I know a number of programs here have already done some kind of user testing. We'd love to hear what kind of tools or approaches have worked well for you. We've highlighted three practical kits here on this slide that can help you get started with this if you've never done this before. So, usability testing can be as simple as having a basic script and asking a litigant or asking a fellow colleague at the court, or a community partner if they're stakeholders, to walk through completing a pilot version of an online tool or process and give you feedback based on the scenario that you outline.

Or you can do workshops or online interviews or more extensive usability testing activities and have that be a more robust research phase, but what I really love about these starter kits is you can do something really small, kind of bite-sized, or they walk you through how to do something much more ambitious. I think what I've found with user testing is a little goes a long way in this area. If you can get five to seven people to test your tool or test your online content, you're going to get some really rich and often humbling feedback about that. And after about five or seven, you're probably going to start to hear some similar themes and similar feedback. So within about that number, you can usually cover a lot of the major issues that might surface within your target audience. One of the other suggestions we would make in this area is to consider partnering with an information school or a social work school, a technology school, either undergraduate or graduate in your area.

Often there's students that are getting exposed to these methods as part of their coursework in those subject areas and can be great partners on helping to structure and conduct usability testing. So, if you're interested in learning more about this area or just aren't sure how to get started, these are three great kits. You also can reach out to us and we're happy to share some articles and resources that PBN has published and shared with our partner network about our own experience doing this kind of usability testing. And I know that help centers and public access law libraries in many jurisdictions also can be asked to assist with litigant user testing as well and can be great partners in helping to recruit and host these kinds of testing sessions.

Jeanne Ortiz-Ortiz:
Okay, so I'm going to start here before I hand it over to Tim, but the next step is the launch. So, by launching your initiative, you'll be ready to operationalize everything that you've been working on and also raise awareness about the benefits of your project. Here are four things to consider as you plan your launch.

The first one is to confirm a formal launch date. The date should be selected based on the readiness of your initiative, but if you need more time to prepare, you can always consider a soft launch, which will allow for additional testing and refinement before the full launch. Also, helpful to think about an announcement or a press release. And I think this step is often overlooked. And I can't emphasize it enough, but an announcement offers a formal description of your program's objectives and activities, and it serves multiple purposes, including helping in fundraising efforts. You can always link back to share the history of your program by sharing that announcement. It helps with branding and other also helps with other websites or social media accounts to help you spread the word. And if anyone is googling your program or looking for it online, they can always find your announcement and learn more. Next slide. Tim, right?

Tim Baran:
Yes. [inaudible] So, speaking of pilot launch ... okay, so I am going to talk a little bit more ... thank you, Jeanne ... about an outreach plan. I think it was Kevin Costner who famously said in the Field of Dreams that if you build it, they will come, but that's not true for what we do. We're not building a baseball team. And we spend so much time and energy and resources in building things that don't get traction sometimes. And I think we've all experienced that. And why is that? On the one hand, you could look to the initial needs assessment and the project along the way and say, "Did we really interpret this correctly?" But I think more often than not it's, "Hey, we built this. It's really great, but do we reach out to the committee?"

I love over the course of this conference, August's Justice For All listening sessions, and a similar one from Justice Hart- Virtual Listening Tour. So, you don't even have to wait to go into different Judicial Districts or into different neighborhoods. You can do a virtual listening tour. And maybe what you could do is adapt that listening tour to sort of a listening and information sharing tour, because you always want to get feedback, but in that effort, you can recruit partners in your outreach efforts. And as we found out in the last few hours, importantly include non-lawyers, community partners in your outreach efforts.

But just let's look at the few cores. The first is, who is your audience? Which, is it statewide? Is it regional? Is it in a particular Judicial District? What do we want them to do? Do we want them to contribute content? Because when you think about your audience, often it's not just one segment. One of the segments is the audience that the project serves, but another could be who helps us maintain and develop this project? And then what is the message that we want to give, or we want to impart to them? Is it something around immigration concerns? Is it online legal resources? Is it a clinic that we want folks to come to? So, this is where regional “Who is our audience?” comes in really, really handy. And then very importantly, where can we reach our audience? Do we reach them via social media? Obviously, we can reach them via libraries. We go all around the State, and we have these partnerships with libraries, places of worship, legal service partners, even conferences, webinars, listservs.

And then how will we reach them? Will we reach them by... think about what we do and how you could optimize the opportunity for folks discovering without your actually interacting with them. So, let's say it's around content. You can optimize your search engine optimization. You can think about creating email campaigns, newsletters. So how will we reach them? Are there additional resources that needs to be developed or invested in these methods, like postcards and posters, updating a social media page, blogging? Very, very important. Blogging seems like some something quaint from yesteryear with AI and all of these other elements today, but it's still very, very important for messaging, for search engines, finding what it is that you want people to find out about and surfacing that in search results.

And then finally, again, who is... as I mentioned in the project governance part, who's responsible for this? Just as important as these elements are in building out the project. It's just as important for your outreach, because you could create something like a beautiful plan, and here's this implementation plan over three months. And if no one takes ownership of that, who is responsible for different elements, it's just not going to get done. So, taking a good idea and a brilliant plan to execution means that you have to identify who's responsible each step of the way. And then I would say the final thing is what's attainable? You have to be very, very realistic in these efforts. What's attainable with the resources that we have over the next three months, over the next six months? So, think about that. Cool, next slide.

Okay. Yeah, I just wanted to mention LawHelpNY. All of the things I just mentioned about thinking about who's responsible for different things, thinking about a project plan, thinking about not trying to do too much is what we have been trying to do this year with LawHelpNY. LawHelpNY has been around for many, many years -a couple of decades- and gone through many iterations. We just moved to an open source with a grant from LSC and involvement with the community partners LawNY and others, it's just been an amazing experience, but we have really this year gone back to the basics, paying attention to fundamentals. You can't innovate if you don't have a firm foundation to build upon. So, this is one of the things that we're trying to do this year with LawHelpNY and then beyond. So definitely some of the things that you should think about are contacting us, helping us to promote whatever your efforts are. And moving to the next slide, I think is it's Jeanne. And thanks for speeding me along. Go ahead, Jeanne.

Jeanne Ortiz-Ortiz:
Okay, so we can go to the next slide, which is an example of an outreach tracker we are using for disaster preparedness and recovery virtual trainings that Pro Bono Net is hosting this summer. So, by documenting your outreach activities, you can maintain a clear record of the various groups and individuals with whom you have shared your training or your initiative announcement. And this is also a knowledge tool. It can help inform future outreach strategies, and it's something that you can consider sharing with allied stakeholders who are also launching their initiatives if you share similar target audiences. Next slide.

Okay, so the last stage is monitoring and evaluation, which is that the goal here is to collect and analyze data that allows to measure the impact of your program and identify areas of improvement. Every program will have different indicators to measure progress, but it's helpful to consider the specific outcomes that you would want to achieve through your initiative. It also helps to clearly define what progress looks like once your initiative has launched. What are the milestones that you're looking for? Is it increased participation rates? Is it better access to courts? Is it specific outcomes related to self-help or legal empowerment? Et cetera. Okay, next slide.

And then just a few more points here about data. Anecdotal data can also be valuable in measuring progress and capturing insights. So, this could include conducting surveys, interviews, focus groups to gather firsthand experiences and stories from program participants. I think the important part here is to uncover trends, patterns, and insights. Look for significant issues. And this can also help in storytelling. You can analyze the data to find compelling stories to reach more people, funders, or educate the community about your initiative. Next slide. Okay, just two simple questions from a satisfaction survey that we've included for your reference. Next slide. Okay. Oh, you're muted, Tim.

Tim Baran:
So just very quickly, it's really important to think about sustainability of a program as much as you think about building that program. So how much does it cost? What partners do you need to build this program? Think about after you build and launch that program, how do you maintain that over time? Next slide.

Liz Keith:
And lastly here, to wrap up, last but not least, is to be sure to celebrate your success and learning.

Tim Baran:
Yes.

Liz Keith:
And it's important. Not every project will be a success and reach the scale that you hope. Not every project will live forever, but regardless of whether you know your project lasts five years or one year, take time to reflect on what worked, what didn't work well, what might you do differently next time. And to recognize and celebrate that, the work of your colleagues.

And we've included a couple of resources here to help structure those kinds of retrospectives and learning sessions, but really there's so much incredible, really important and often really challenging, complex work underway in this community. Sometimes the first pilot doesn't quite go as well as planned, but it lays the groundwork for really successful learning and pivot and evolving to a larger kind of more impactful initiative in the next stage. So, we're going to pause there. We have included some additional resources here in the slides that will be available for reference and see some great resources being shared in the chat, but we want to leave time for some additional guest speakers in this section. So, I'll turn it back to Judge Fisher to bring in those other perspectives.

Hon. Fern Fisher:
So, I want to thank Pro Bono Net for all of the work that they do to serve access to justice. They're such a humongous, a huge partner in moving access to justice forward, and thank goodness you exist, but I want to particularly thank you for your presentation today. So, all of us can benefit from just going over nuts and bolts, whether you're just starting an initiative or you're in the middle of an initiative or you are looking backwards to see what went wrong or what went right with an initiative. So, the slideshow that Pro Bono Net has provided will provide you with some very helpful links, and that presentation is available in the agenda.

So now we're going to hear from some members of the court community who have engaged in access to justice initiatives, and they're going to talk about the good, the bad, and maybe even the ugly of launching an access to justice program or initiative. So, we're going to hear first from Jay Mangold. Jay is the Coordinator for Access to Justice Initiatives for the Ninth Judicial District. Jay, so among your responsibilities, you developed and coordinated the Foreclosure Legal Clinic. What elements have been built into that clinic to ensure its success?

Jay Mangold:
Thank you, Judge. Yeah, I believe the first step to developing a successful clinic is to conduct a proper needs assessment, as Liz indicated earlier. I think having a worthwhile concept is not enough. I think practical considerations are a must. So ideally, I feel that the program must serve a sufficient number of people, and the program must answer the public's frequently asked questions, and the program should protect a substantial right that may be at stake. Now in the case of our Foreclosure Clinic, that need was determined based upon the case types and the questions asked of our District Help Center, which at the time was staffed by me. I was the Director of that office and I was the only staff member serving five counties. So, I heard every problem and every inquiry provided by the public, which came to approximately 1200 inquiries per quarter pre-COVID.

So based upon that experience, it could be said that I had my finger on the pulse of our court users, and we could easily in our district identify a need to provide advocacy to homeowners in foreclosure. Another key to operating our successful clinic is the effective recruitment of volunteer attorneys. Effective recruitment is essential, and that involves first getting the word out, but that is the easy part. That's easily addressed by sending out an email blast to all the court's partners within the community, like Bar Associations, legal service providers, local law firms, but getting the word out isn't enough.

So, when all is said and done, when you're operating a clinic, you have to treat your volunteers right. Now what I mean by that is the following. We often think about our court users as being our customers, and that's true, but our volunteers are our customers as well. They have absolutely no obligation to be participating, so it's of crucial importance that we offer them the right incentives to enroll in a program and remain in the program. So how do we do that? We offered training that provided free CLE credits, which our District granted immediately after their training. We guaranteed our volunteers defense and indemnity in the event that an adverse claim is filed against them for the work that they do in our clinic. And we also solicit their feedback throughout the program.

Our volunteers are recruited to help our court users, but they help us as well, because they offer fresh perspectives and perspectives that we can incorporate in the program. And once they've contributed in this way and they see that we're incorporating their ideas, they now feel vested and will have a greater interest in continuing their relationship with the court and the court-sponsored clinics. And volunteer feedback is related to my last element to ensure success, and that is to approach every program, every clinic program with the mindset that it will always be a work in-progress. Clinics require constant upkeep. And when we were developing our clinic, we drafted a proposal that we thought contemplated everything. We thought we had every form down, we thought we had figured out all the logistics, but when you work with the public, you can bet that they'll surprise you with something that you haven't thought of yet, which was a lesson I should have learned having worked at the help center.

But clinics are always evolving, and we had to be flexible with ours. So as an example, our clinic clients would present various unrelated case types that would affect their foreclosure. So, they're here to talk about their foreclosure, but all of a sudden, they're talking about their ex-spouse and what their divorce judgment required as far as the home. They're talking about estate issues. There might be a defendant that's named who is now deceased. Bankruptcy. So, the volunteers needed to have answers to these questions. So, the supervisor for the clinic had to provide on-spot training and follow up on that training during subsequent clinic sessions. We've been operating this clinic now for about seven years, and we're still fine-tuning and doing our best to streamline the process to this day. So those are my thoughts on how we've operated our successful foreclosure clinic, and we're looking forward to applying those principles and those principles presented in today's program to expand our current clinic and develop new ones to serve our district.

Hon. Fern Fisher:
Thank you, Jay. I appreciate. Continue to put your questions into the chat because we will try to answer them either during the session or after the session. All right, so our litigants that come to the court system don't just come with legal issues. They come with social services issues that are mixed in with the legal issues. So as members of the court system, we can't operate in a silo with just lawyers. We have to reach out to other disciplines. So, an interdisciplinary approach to solving the problems of litigants that come before the court is always key. And in the Third Judicial District, they launched a program using social workers. And I want to introduce you to Christy Bass, who's the District Executive. And you've been using social workers who are fulfilling their internship requirements for graduation to serve as court navigators, helping litigants in Greene County Family Court. Can you tell us what they do, and any challenges encountered in developing the program?

Christy Bass:
Certainly. Thank you, Judge. I sort of have to chuckle when we refer to developing the program. The program just sort of hit us over the head. It was sort of a surprise. It just happened on its own. So, as I'm

listening to the Pro Bono Net team, I'm thinking, "Oh my God, there's so much more evaluation and planning I need to do," but we actually are very fortunate in the Capital Region that we have a lot of local colleges with some advanced degree programs. And the College of St. Rose and SUNY-Albany reached out to us for internship programs for their graduate-level Masters of Social Work students. So, in Greene County, we have two students that man the court full-time. So, five days a week they are there, and they are the intake person when you enter the court. And they help litigants and families sort of navigate the court process.

They have the time to really explain what's going to happen next, what's an attorney for the child, help them fill out the paperwork, but they also do sort of a global assessment of that person's needs as they present to them immediately. So, if they have housing issues or access to food or daycare, they can connect them with a lot of community resources. What I love about this program so much is it not only serves our access to justice goals, like the mission of the courts and helping these individuals navigate the court process, but it also helps our employees, and it helps with morale because it brought the temperature down when they're approaching the intake window or walking into a courtroom. Everybody's calmer, has a little bit more understanding of what's going on, feels as though they're there to be helped.

There's sort of a buy-in and a trust that these students are able to facilitate. So, in this coming year, we are planning on formalizing this program and also keeping a little more track of the data, what really is our usership and our results and what are our metrics and what do we really want to do with it? Some of the challenges are the challenges our workforce faces every day -- confidentiality, appropriate training, safety is always a concern -- but all in all, so far, it's been a success. And again, as before with the Faith Leaders Day, we're available with any questions anybody might have.

Hon. Fern Fisher:
Thank you, Christy. Social workers can be very important partners in providing access to justice, and you should look into your local schools. But also, if they're not doing internship for course credits, some are required to do community activities, pro bono work, so to speak, to move forward in their progress towards their degree. So, you can also look into Human Resources programs. Sometimes they provide students as well. So, we're going to move on to Lonnie Wellman, who's from the Good Neighbor Program Director, Goodwill of the Finger Lakes. And let me point out that partnerships with our community-based organizations and agencies are key to the court providing as much access to justice as we possibly can. And we thank our partners for the work they do, including Loni Wellman's program. So, Loni, tell us about your program. How did you work together to develop this program?

Loni Wellman:
Yeah, thank you so much, Judge Fisher. I'm very excited to talk about our Community Connection Desk, we call it the CCD, at the Monroe County Hall of Justice. My name is Loni, my pronouns are she/her, and as was mentioned, I'm the Good Neighbor Program Director at Goodwill of the Finger Lakes. As you can imagine, a project like this requires true partnership, trust building, and a whole lot of community buy-in. So, what is the Community Connection Desk? We'll start with that. We call it the CCD. It's a space in the Seventh Judicial District where individuals can get connected to resources and services in the community. Folks can come to us for support with potentially filing for DHS applications, connecting to rental assistance, getting connected to programs with care and case managers, and other programs that help them succeed in their independence.

Driving straight into the CCD lore, the concept was birthed when the Honorable Judge Doran and Mr. Simeon Banister of the Rochester Area Community Foundation were meeting for lunch at the Hall of Justice. During their time, both noticed a number of people at court who simply needed help, directions, connections. The initial idea was to have a live, 211/Life Line tele-counselor in the courts to connect folks to the many resources in our area with an in-person 211/Life Line connection. 211/Life Line is a mission program of Goodwill of the Finger Lakes, and we partner with them internally for training. And that's just to kind of help the connect the dots of why Goodwill is in kind of this space. As the project began to take shape in the minds of Judge Doran and Mr. Banister, another project, which was the EPPI 2.0, was utilizing space in the Hall of Justice to assist individuals with emergency rental assistance.

Coincidentally, or probably not, the EPPI Desk was part of a project that Judge Doran's team implemented as well. We were able to learn a lot from their two years that have helped the CCD, and we were very interested in the learnings and experience that was gained by the operation of the EPPI Desk. I was brought onto this project in December of 2022, so not too long ago, and this was when the Community Foundation invested in the project with a grant, so partnership number one, money, to bring the idea to life. The first main goal for me was to find a dynamic individual to be our community navigator at the Hall of Justice. Basically, we needed somebody to build trust. This individual was key to the success of the CCD. They had to be empathetic, strong with excellent self-care, because as we know, we can't care for others if we can't care for ourselves. And most importantly, they had to have the community at the forefront.

We were so lucky to find Roxanne. She's probably listening right now. She's our first Community Navigator at the CCD. And in her short time and during our soft launch, she has created strong relationships with staff, judges, and other CBOs who utilize the space. We have three desks at our CCD. One is for Roxanne and the other two are a desk for community volunteers focusing on social work internships or folks who just want to give back. And then we also have a desk for community-based organizations that want to utilize the space. Maybe they don't have a brick-and-mortar place, but they want to be able to connect with folks that are already in the courthouse. We also partnered with Together Now as they had historical experience running the EPPI desk. And as part of the partnership, they graciously lent us their project manager, Gage, who was indispensable to moving the project from conception to product.

Another integral partnership was with the Seventh Judicial District, the team headed by District Executive Ron Pawelczak took immediate action helping us secure space offices and access to the courthouse. Together, we came up with the name, the Community Connection Desk, as we wanted to be seen as a place to get connected to resources. So many individuals are not aware of the resources available to them or just don't know where to begin. And our hope for the CCD is to be able to be a front door to folks on their way to independence. I try to remind our team that individuals may not get everything they want, but they're going to leave our desk with everything they need and a start to that independence.

With the pieces in place, we held a stakeholder kickoff, inviting community partners in the law community, social work care management, and other CBOs. Ron also supported us as we presented in person to the staff at the courthouse. Our next steps will be a hard launch at the end of this month or beginning of next. Got a lot of different people in the area where we need to make sure that anybody that's important can be there, but after the ribbon cutting and fanfare, we'll be holding informational sessions within our law community, so everybody is aware of the resources at the Seventh Judicial District. We imagine the CCD to be a dynamic access point driven by our community and to help them navigate resources, give hope, and build trust between the community, Goodwill, and our court system. Thank you.

Hon. Fern Fisher:
Thank you so much, Loni, and thank you for being a good partner. Our next member of the court community is Joanne Haelen, the District Executive of the Fourth JD, which covers Schenectady County and the North Country, including the Adirondacks. Joanne, your idea was to provide computer access in a local Town Court to make it easier for litigants who live at a distance from the court to attend court remotely. I understand you had to somewhat adjust things. What steps are you considering now that the program was not exactly what you thought it would be, and what were the problems that you encountered and what are you doing to address those changes?

Joanne Haelen:
Thank you, Judge Fisher. Yeah, as the Pro Bono Net team talked about, when evaluating, sometimes you find that the situation evolved from the time you started it until the present moment. And that was the situation with our remote access kiosks, which we had determined would best be placed in some of our Town and Village Courts, which geographically were at a remote distance from our courthouse. And it was working fine. The pandemic though resolved, and appearances started to come back in person. So, what we needed, we found, was remote filing. And at the same time, what was going on is we had pilot projects in our Family Court for Family Court e-filing. And those have now been fully rolled out in two of our counties, one of which is one of our rural counties, but people aren't using it. So, the question becomes, why not?

So, we did a little bit of anecdotal, nothing to the point... I found the Pro Bono Net team's presentation very, very informative, because my little ideas at how to now analyze what is it that would really help at this point in time, because it's not remote access to virtual proceedings. There are no virtual proceedings. And where they do exist, they're for preliminary purposes only. And most of our Judges and Support Magistrates will accept appearances via phone. The key now shifts to filing. And what we're looking at and what we're finding is most people have mobile phones. They don't necessarily have computers and printers. So, if I go online and all of the forms, many of the Family Court forms are online, but they're not fillable online and there's no button at the bottom that says, "Hit the submit button and all of a sudden we'll move you over to NYSCEF and you can e-file that petition."

So right now, the idea is while we can... and let me just say also, the Town and Village courts are not that amenable to a scanner and a printer and all of the other accoutrements that would come along with somebody physically coming into a Town Court to fill out paperwork. So we're looking at paper copies right now of the Family Court forms that are in Town and Village Courts for people to use, but more to the point, we're starting to explore filing centers in some of the libraries that are at remote distances from our courthouse, the idea being if we can take that degree of technology and put it in a spot in the county or spots, plural, where it can get the highest volume of use, that is probably the best. And rather than look at every single Town and Village Court as a point of access to the Family Court, to start placing things geographically in spots that have a higher volume and in locations that can support the printer and the scanner and everything else that's required.

We're also looking now to work with the Court System and the NYSCEF folks to see if there's any way, because right now, in order to e-file, you have to have your petition already presented, and then you have it in PDF form and you upload it. That can be a bit of a barrier for people who are filling out petitions on their phones. So, we've got a lot of fronts going on. And yes, it is, I don't want to call it a failure because the kiosk system itself was not a failure, but it ended up failing because the landscape changed. And I think to your point, the Pro Bono Net team, it's so important to keep evaluating. Once you put it there, that's not the end of it. You have to keep going back and make sure the need is still relevant and that it's still working its intended purpose. And its intended purpose is access. However, the access that's required now, we're finding particularly in our rural areas, is not access to virtual proceedings. It's access to remote filing.

Hon. Fern Fisher:
So, Joanne, I applaud your efforts. And I wouldn't call it a failure. I'd call it a wonderful pivot.