

## **1C Developing, Maintaining and Managing an Agency-Wide Technology-Based Legal Services Initiative**

### Tech Services Unit Hypothetical

Best Ever Legal Services Agency (BELSA) provides free legal services to indigent people in the areas of housing, consumer protection/collections, simple estate planning/substituted decision making (wills, POAs, HCPs), and assistance with simple tax filing. The agency also regularly schedules clinics to assist individuals in identifying public assistance programs for which they may be eligible, and then directing them to the appropriate government agency. BELSA is funded primarily by a state-level grant, renewed each year, which provides the bulk of the agency's operating expenses. BELSA also has some private donations earmarked for certain programs and a small, non-LSC federal grant.

In the consumer protection unit, clients frequently complain of other legal issues that have arisen due to lack of funds from high debt and scam victimization. However, this unit is severely understaffed, meaning the attorneys and paralegals are unable to devote time and energy into properly identifying and triaging these other legal issues. The consumer unit is funded by BELSA's state grant.

The tax filing unit has a "tax travel bag" containing an Internet jet pack, tablet computer, and mobile printer. This allows the tax unit to use home visits to complete tax returns and file them electronically. The tax filing unit is funded by a federal grant that is ending in 1 year with no option for renewal.

The housing unit and the estate planning/substituted decision making unit have each developed their own app that is used by intake paralegals to screen clients and identify their legal issues within that unit's realm of expertise. The housing unit is funded by BELSA's state grant. The estate planning/substituted decision making unit is funded by a private donor.

For the public assistance clinics, the government agencies administering these benefits all have online applications, but lack of equipment in the public assistance clinic unit prevents them from completing online applications at the clinics. The public assistance clinic is funded by a private donor.