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Improving Access to Justice for Self-Represented Litigants in San Bernardino Self-Help Centers

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Improving Access to Justice for Self-Represented Litigants in San Bernardino Self-Help Centers



This report was prepared in partial fulfillment of the requirements for the Master in Public Policy degree in the Department of Public Policy at the University of California, Los Angeles. It was prepared at the direction of the Department and of Self-Help Centers of the Superior Court of California, County of San Bernardino as a policy client. The views expressed herein are those of the authors and not necessarily those of the Department, the UCLA Luskin School of Public Affairs, UCLA as a whole, or the client.

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TERMS

Court Departments. This is a general term for workgroups of the Court other than Self-Help. As used in this paper, the term includes but is not limited to court clerks (operations personnel who work inside courtrooms), window clerks (operations personnel who serve customers at window stations similar to those in banks), and human resources personnel.

Daily Tick. This is a term used by Self-Help to refer to customers who need only an answer to a simple question. They are assisted by the Self-Help staff conducting triage and do not receive one-on-one assistance or document review with a paralegal.

JusticeCorps. This is a branch of AmeriCorps developed by the Los Angeles Superior Court. The program recruits undergraduate students for their Student Members and college graduates for their Graduate Fellows. JusticeCorps members serve self-represented litigants in court Self-Help centers.^{1 2}

Other Court Personnel. For the purposes of this report, this term refers to persons of official capacity working in the courthouse, other than Self-Help staff. They do not necessarily have to be court employees; what matters is they are likely to be perceived as such by the public. For example, bailiffs are often perceived as acting under the authority of the Court, but they are employees of the Sheriff's Department.

Self-Represented Litigant. For the purposes of this report, a Self-Represented Litigant is a person representing or preparing to represent himself or herself in legal proceedings without an attorney. Self-Represented Litigants comprise the clientele of the Court's Self-Help center.

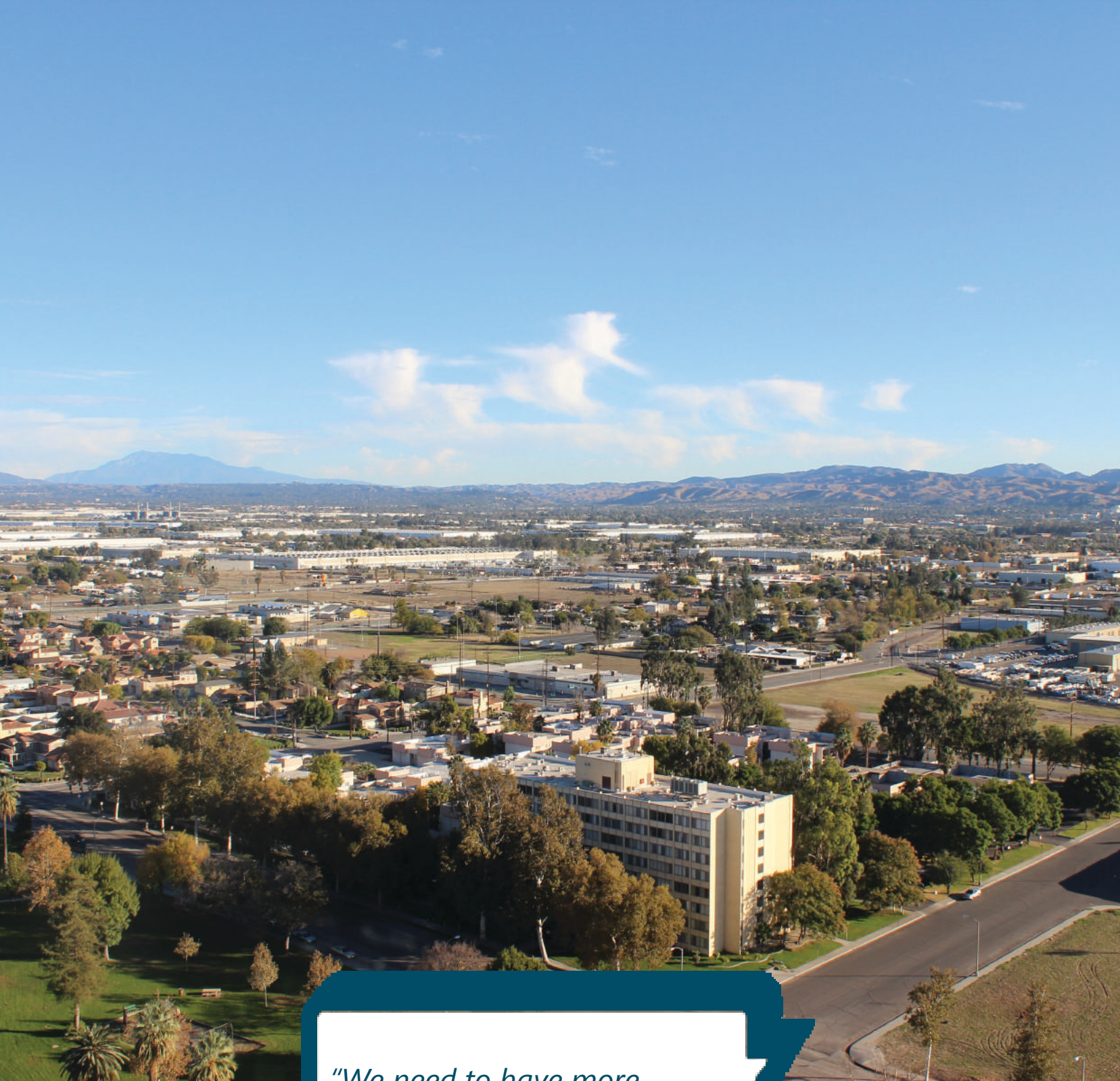
Triage. This is a term of art used by the Self-Help center to describe the process by which they assist customers. All customers take a number and wait their turn to undergo triage. During triage, they are asked about the assistance they seek. There are three outcomes: misdirected customers are referred elsewhere, daily ticks are assisted on the spot, and customers needing complex assistance or document review wait for further one-on-one assistance.

¹ Judicial Council of California. "JusticeCorps." Judicial Council of California, 2016, <http://www.courts.ca.gov/justicecorps.htm>.

² Site visit to Los Angeles Superior Court Self-Help, Stanley Mosk Courthouse, by M.Abesa, M.Cordi, and R. Kudo: February 5, 2016.

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"We need to have more self-help center[s] closer to my area Chino. [I]t is too far to go to San Bernardino."

- anonymous SH customer

EXECUTIVE SUMMARY

Self-Help centers in San Bernardino County contend with an almost daily influx of customers seeking assistance in preparing to represent themselves in court. Self-Help centers provide one of the only available resources in the county for self-represented litigants to gain access to the justice system. Many San Bernardino residents simply cannot afford an attorney. Self-Help staff meet one-on-one with continuous streams of customers throughout the day while waiting rooms fill with anxious people trying to sort out divorces, custody arrangements, evictions, and small claims cases.

Self-Help centers experience extremely high demand given current staffing levels. In 2015 twenty-one Self-Help employees served more than 75,000 customers. Our project seeks ways of improving customer access to Self-Help services without increasing the burden on already overtaxed on-site resources. This translates to reaching a broader audience while finding more efficient service delivery methods.

We identified two overarching categories of problems facing Self-Help: large numbers of customers mistakenly directed to Self-Help centers and inefficient on-site service delivery. Within these categories we identified several barriers to access, including a lack of effective internal communication, use of outdated web-based resources, and inefficient processing of customers. First, 40% of Self-Help customers are referred by personnel within the courthouse. Breakdowns in interdepartmental communication lead to large numbers of customers mistakenly referred to Self-Help centers. Second, web-based resources offer a way of reaching the large and geographically dispersed population of the county, but the current confusing and outdated website stands in the way of reaching that audience. The confusing nature of the website may also contribute to the 60% of Self-Help customers who leave a Self-Help center after making contact at the intake window. If customers cannot find the basic information they need on the website, they may seek answers to their questions in person. Finally, the current model of individual service delivery leads to an inefficient provision of service. On average, a Self-Help staff member assists two to four people per hour, and the average total time spent on-site for a customer who requires individual assistance is 111 minutes.³ These barriers must be addressed if Self-Help is to reach the greatest number of people in need with the highest quality assistance.

We recommend several different interventions to address the problems stated above. The proposed interventions are not mutually exclusive; the Court may implement their

3 “Quick Ticks & Full Page Surveys.” administered January 26, 2016 - February 18, 2016. See Appendix B.

preferred solutions as circumstances best permit.

- **Emphasize Quality Interdepartmental Communication** - Increase the quality and frequency of interdepartmental communication, including an employee training module developed by Self-Help staff, which may decrease the volume of customers misdirected to Self-Help centers.
- **Implement Innovative Approaches to Triage** - Introduce kiosk check-in, and use interns to triage customers. These interventions allow staff to focus their attention on more specialized matters. Kiosks also provide a way of tracking customer information for future evaluation.
- **Introduce Alternatives to Enhance the Waiting Room Experience** - Add additional number displays in overflow areas that do not have line of sight to the primary display. This will help reduce customer anxiety and decrease the number of customers who leave without service. Introduce “welcome videos” that provide basic information to customers while they wait, facilitating more productive interactions with Self-Help staff and providing an earlier opportunity to intercept misdirected customers.
- **Redesign Website to Provide More Points of Access to Self-Help** - Redesign the website with a focus on case types, make information easier to find, and optimize for mobile users. Add content that caters to both visual and auditory learners and centralize it to assist customers in preparing documents at home. Increase services offered online, like expanding the email assistance program and introducing live chat. More effective web-based services provide customers with options for preparing their cases at home.
- **Use Interns to Enhance the Customer Experience** - Develop an internship program based on the JusticeCorps model, but tailored to the needs of San Bernardino. A rigorous program helps streamline on-site services, provides an opportunity to attract talent, and contributes to a favorable public profile for the Court.
- **Transition to a Workshop Model** – Minimize one-on-one services in favor of classroom-style teaching environments. Grouping customers with similar inquiries or case types and serving them simultaneously is a more efficient service-delivery model.

Self-Help centers offer an important service to the people in San Bernardino County, providing free assistance to tens of thousands each year. Going forward, the centers have an opportunity to serve even more of the county through interventions to ease access both on-site and online.

THE COURT & ITS SELF-HELP CENTERS

Client Summary

Our client is the Self-Help center (SH center) of the Superior Court of California, County of San Bernardino (Court). Our client provides assistance to self-represented litigants (SRLs) as they navigate the court system. Our client does not provide legal advice to litigants; rather, they seek to ensure that litigants are prepared to represent themselves in court.

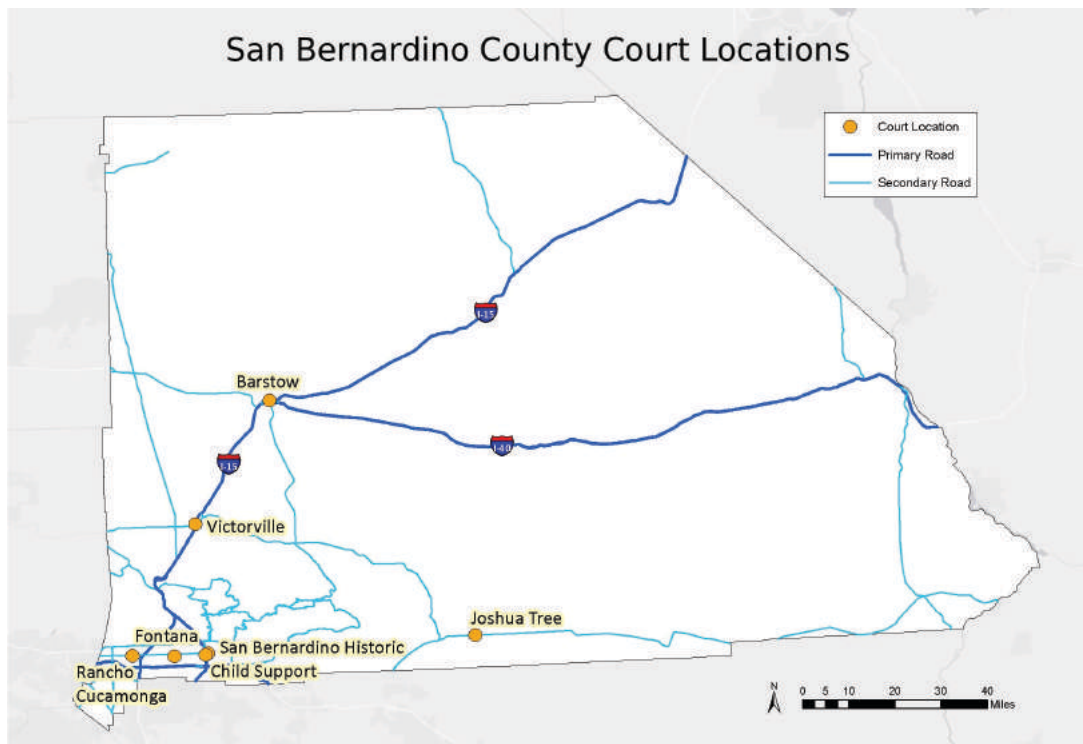


Figure 1: Court Locations in San Bernardino County

The San Bernardino Court

The San Bernardino Superior Court is the fifth-largest trial court in California, measured by the number of filings per year.⁴ In the 2013-2014 fiscal year, there were 411,101 new filings in the Court.⁵ As a frame of reference, the Los Angeles Superior Court – by far the largest in the state - fielded 2,183,611 filings.⁶ The fourth largest court, Riverside, fielded 423,340 new filings;

4 Judicial Council of California, Administrative Office of the Courts. *2015 Court Statistics Report. Statewide Caseload Trends*. San Francisco, CA, 2015. Page 82. <http://www.courts.ca.gov/documents/2015-Court-Statistics-Report.pdf>

5 Ibid.

6 Ibid.

Sacramento, the sixth largest, fielded 325,138.⁷

The Court serves the largest county in the contiguous United States⁸ (See Figure 1). At 20,160 square miles, the landmass of San Bernardino County is larger than Rhode Island, Delaware, New Jersey, and Connecticut combined.⁹ This massive geographic footprint poses unique challenges. Ideally, all 2,112,619 residents¹⁰ of San Bernardino County should have equal access to the judiciary. In reality, logistics make this ideal very difficult to attain. Residents who live near the California’s eastern border have to make a much longer trek to access services than residents who live in downtown San Bernardino. This problem has been exacerbated by constant cuts in the state budget, which led remote courthouses in the San Bernardino desert areas to close or to limit service days.

The Self-Help Center

Although popular culture may lead us to imagine interactions with the court system to necessarily involve lawyers, this is often not the case in reality. Many litigants approach the court system without representation. It may simply be due to case type: Small Claims cases, by definition, are civil disputes over a relatively low amount of money, and parties are required to represent themselves. It may also be that the litigant could not find a lawyer to take his or her case. It may be that the litigant could not afford an attorney.

In any event, SRLs comprise a significant amount of court traffic.^{11 12} To support these litigants, the Court maintains SH centers in multiple locations throughout the county.¹³ SH centers cannot give legal advice, fill out forms, or represent litigants in court. No attorney-client relationship is created between the litigants and the SH centers. SH centers simply seek to ensure that litigants understand the processes and requirements of the Court so that they feel more comfortable navigating the justice system, minimize unnecessary costs and delays, are better prepared to represent themselves in court. All services rendered by the SH centers are free of charge. There are no income restrictions; the only requirement is that the litigant does not have an attorney.¹⁴ SH centers offer several types of procedural assistance:

7 Ibid.

8 “General Information - Resource Guide.” Superior Court of California, County of San Bernardino, <http://www.sb-court.org/Portals/0/Documents/PDF/General%20Information/SBCourtResourceGuide.pdf>.

9 Ibid.

10 Ibid.

11 Kelly McNamara. Superior Court of California, County of San Bernardino. *Self Help Services Staffing and Service Delivery Models: Today, Tomorrow, and Beyond*. San Bernardino, CA, 2015. Page 2. Unpublished Document.

12 Judicial Council of California, Administrative Office of the Courts. *Model Self-Help Pilot Program: A Report to the Legislature*. San Francisco, CA, 2005. Page 1-2. <http://www.courts.ca.gov/partners/211.htm>.

13 Kelly McNamara. Superior Court of California, County of San Bernardino. *Self Help Services Staffing and Service Delivery Models: Today, Tomorrow, and Beyond*. San Bernardino, CA, 2015. Page 2. Unpublished Document.

14 “Self-Help - San Bernardino Superior Court.” Superior Court of California, County of San Bernardino,

indicating the proper forms needed for a case type, reviewing completed forms, assisting in the preparation of default judgements, and preparing SRLs for court appearances.

The SH center currently offers services in the San Bernardino Historic Courthouse, the Victorville Courthouse, the Child Support Division, and the Fontana Courthouse. The Barstow Courthouse and the Joshua Tree Courthouse also offer Self-Help services, albeit on a much more limited schedule.¹⁵ The Court also offers services by e-mail and by telephone, although document review cannot be done remotely.¹⁶

The SH centers offer assistance on civil cases only; they do not offer services for criminal law cases. The supported case types include Family Law, Guardianship, Small Claims, and Unlawful Detainer. The Child Support Division is specially mandated and funded to provide assistance with Child Support cases requiring government intervention and enforcement.¹⁷

Self-Help services experienced rapid growth in the first years of the current iteration of the department. In 2007, there was more than a 100 percent increase in customer traffic, and 2008 saw a 158 percent increase over the previous year. For the years 2009-2011, growth slowed to 19 percent, 12 percent, and 0.8 percent respectively. After 2011, the SH centers experienced a reduction in traffic, which coincided with the budget crisis. While we are not able to say definitively that budgetary cutbacks caused the reduction in customer traffic, it does seem likely. At its peak, Self-Help services helped 92,470 San Bernardino residents access the legal system across several different case types in a single year.¹⁸ There is a demonstrated demand for this service in the county.

Self-Represented Litigants

It is easy to imagine why interactions with the court system may be daunting. It is not often that an individual is called to participate in judicial proceedings (except perhaps as a juror). By definition, the courts are venues for dispute resolution and enforcement of government decrees, and it is difficult to imagine many situations where someone is in court for a pleasant reason rather than a problematic one.

Common realities faced by people in court include the following:

- A landlord is dealing with a delinquent tenant who has not paid rent in three months

<http://www.sb-court.org/SelfHelp.aspx>.

15 See Appendix D.

16 Kelly McNamara. Superior Court of California, County of San Bernardino. *Self Help Services Staffing and Service Delivery Models: Today, Tomorrow, and Beyond*. San Bernardino, CA, 2015. Page 6-7. Unpublished Document.

17 Management informal communication conducted March 5, 2016 at Riverside. See Appendix A.

18 Kelly McNamara. Superior Court of California, County of San Bernardino. *Self Help Services Staffing and Service Delivery Models: Today, Tomorrow, and Beyond*. San Bernardino, CA, 2015. Page 2. Unpublished Document.

but refuses to vacate the premises. An SH center can instruct the landlord as to how to initiate California's eviction proceedings.

- A tenant is behind on the rent but knows that he is receiving enough money within a matter of days to pay all outstanding rent and any associated penalties. However, his landlord is attempting to evict him in violation of California's strict eviction requirements. An SH center can show him how to file a response to the eviction suit in a timely manner.
- A young couple decides to get married after an especially romantic Valentine's Day. After three less-than-romantic months, they agree to get divorced. They both incorrectly assume that since they are parting on amicable terms, a divorce can be quickly obtained from the Court. They can go to SH together to make sure they fulfill all the technical requirements of getting divorced.
- A young mother shares custody of her 4-year-old with the child's father. The mother has recently learned that the father may be abusing alcohol, and she wants to amend their shared custody agreement to protect her child. The mother can use Self-Help assistance to ensure her request for a modification of custody is complete before filing the paperwork with the Court.

The people in the examples above are all in bad situations, and there is no recourse for them but to go to court, a process that involves complicated forms and very specific rules. For some, those are matters for their lawyers to deal with. For those who cannot afford or find a lawyer, they are obstacles that may seem insurmountable. SRLs are dealing with potentially life-changing situations without the benefit of an attorney. SH centers aim to guide SRLs through the complexities of the judicial system so that they can make themselves heard in court and receive the due process to which all Californians are equally entitled.

POLICY QUESTION

The Court weathered severe budget cuts in the late 2000s, leading to layoffs, court closures, and limited service hours.¹⁹ Self-Help suffered as much as any department in the Court. The SH center faces limited staffing, severe space constraints, and rigid budget restrictions, which create barriers to customers receiving service. In light of the challenges faced by Self-Help, our policy question is as follows:

How can the Superior Court of California in the County of San Bernardino improve access to Self-Help services while decreasing the burden on on-site resources?



¹⁹ Judicial Council of California, Administrative Office of the Courts. *San Bernardino Budget Snapshot*. San Francisco, CA, 2015. http://www.courts.ca.gov/partners/documents/County_Budget_Snapshot_San_Bernardino_2015.pdf.

RESEARCH METHODS

To answer our policy question, we first needed to understand several elements: our client itself, our client’s existing processes, the institutional and political context in which our client operates, and our client’s customers. As we learned more about these elements, we were better able to articulate the barriers our client faced in solving its problem. This in turn made it evident that some solutions were more viable than others.

Literature Review

We began our data gathering by conducting a comprehensive literature review about the experiences of SRLs with the court system and SH centers. The literature was not specific as to the experience of SRLs in SH centers; rather, it spoke more broadly of the SRL experience in the court system. Neither did we find much literature on SRLs in our client’s county. The few studies of SRLs covered national and state trends. We did, however, find constructive records maintained by our client for submission to the Judicial Council of California, the statewide administrative arm of the courts. We also interviewed a member of the advisory committee for evaluation of one of the pioneer quantitative studies of SH centers to better understand what type of data we should seek.²⁰ After the literature review, we realized that the Court needed to increase its data collection before it could conduct sophisticated analyses of the Self-Help center’s impact on court services and vice-versa. This limitation effectively precluded interventions that relied on integration and reliable information-sharing between Self-Help and operations at large, such as recommending a stronger Self-Help focus on a certain case type over another.

Surveys

The Judicial Council’s records include so-called “intake surveys” given by our client’s paralegals to the customers they assisted one-on-one. These surveys have been conducted at all of our client’s Self-Help locations since 2007. To augment these data, we also helped the Court implement an online survey issued to customers who sought help via e-mail. That survey spanned January 4, 2016 through February 23, 2016 (N = 88). Additional survey questions were asked of the customers who sought one-on-one help (N = 100), and a shorter version of that survey was given to the “quick ticks,” or the customers who came to have a quick question

²⁰ UCLA Law Professor Joseph Doherty, interview by M. Abesa, M. Cordi, and R. Kudo, November 9, 2015. See Appendix A.

answered (N = 32). These additional surveys did not yield a large enough sample size to be statistically viable, but they did serve their purpose: challenging existing assumptions and corroborating our other sources, such as interviews, observations, and analysis of publicly available data like the American Community Survey. The various surveys provided insight into a broad range of customers interactions with SH services: sources of referral, types of customer interactions with staff, use of web-based offerings, and length of on-site waiting times.

These surveys, if maintained after the conclusion of this project, will also give the Court the data necessary to assess the effectiveness of our proposed interventions and begin benchmarking their performance. The survey forms used are in Appendix B.

Observations and Interviews

We gathered additional data from the Historic location by way of structured observations. The dates of observations and the forms used can be found in Appendix C. These observation sessions allowed us to see the obstacles to access in a concrete way and gave us a much better grasp of our policy problem. They illuminated simple, tangible improvements such as adding display monitors in the waiting areas to make it easier for customers to see when it is their turn to be served.

We also conducted interviews with Court staff to support various parts of our analysis. Interviews with Self-Help staff gave us a better understanding of the policy problem, while interviews with the Court's upper management team contextualized the issue and helped us understand institutional constraints. Court staff also provided information as to the dollar costs and staff costs of our proposed alternatives. Taken together, these interviews supported certain alternatives, such as improving interdepartmental communication through formal channels, and discounted others, such as mobile Self-Help clinics. A full list of interviews is in Appendix A.

Website Review

To assess the effectiveness of the Self-Help website, we role-played as litigants who were unfamiliar with the court system. We attempted to find clear descriptions of the legal proceedings, the forms litigants would need to navigate those proceedings, and assistance in completing those forms. We also reviewed the websites of other courts and government entities to find effective practices. This process highlighted the pressing need to improve website navigability and optimize for mobile devices.

Site Visits

We visited the Superior Courts of Los Angeles County and Riverside County to observe their operations. While on-site, we interviewed a number of Los Angeles and Riverside staff, ranging from JusticeCorps interns to executive management. These observations and interviews helped us understand what challenges were unique to our client and gave us fresh ideas for our

alternatives. Los Angeles, for example, benefits from the active contributions of the county bar association and nonprofit legal organizations. This is not something that our client can immediately replicate. On the other hand, the workshop models we observed in Los Angeles and Riverside can be viably adapted for our client's use.



"I was so content on how fast the email service responded, and they provided a lot help. Thank you!"

- anonymous SH customer

FINDINGS

Overview of the Typical Customer Experience at Self-Help

In order to understand some of the challenges faced at SH centers, it helps to understand how customers access on-site services. Figure 2 shows the on-site service flow. Initially, each customer draws a paper ticket with a sequential number and waits for his or her number to be called. Prior to opening in the morning, staff place the ticket dispenser outside the main door, so that customers who arrive before opening can draw a ticket. The dispenser is moved inside upon opening. Once the center is open for business, the paralegals or Self-Help assistants assigned to triage begin screening customers. Some customers cannot wait long enough to be seen at triage and leave without being served. Others proceed to the triage window when their number is called. Here several things can happen. Some may discover they have been mistakenly sent to the SH center and cannot be helped by the staff. Others have brief questions or can otherwise be helped immediately by staff at triage. Finally, triage staff may determine that the customer should meet one-on-one with a Self-Help attorney or paralegal, and they must then return to the waiting room to wait for an available staff member. Some customers may not have time to wait again. In this case, they must return another day and begin the process again. Others meet one-on-one with a staff member, which may be the final stop. The initial visit may also lead to subsequent trips to an SH center, depending on the circumstances of the case.

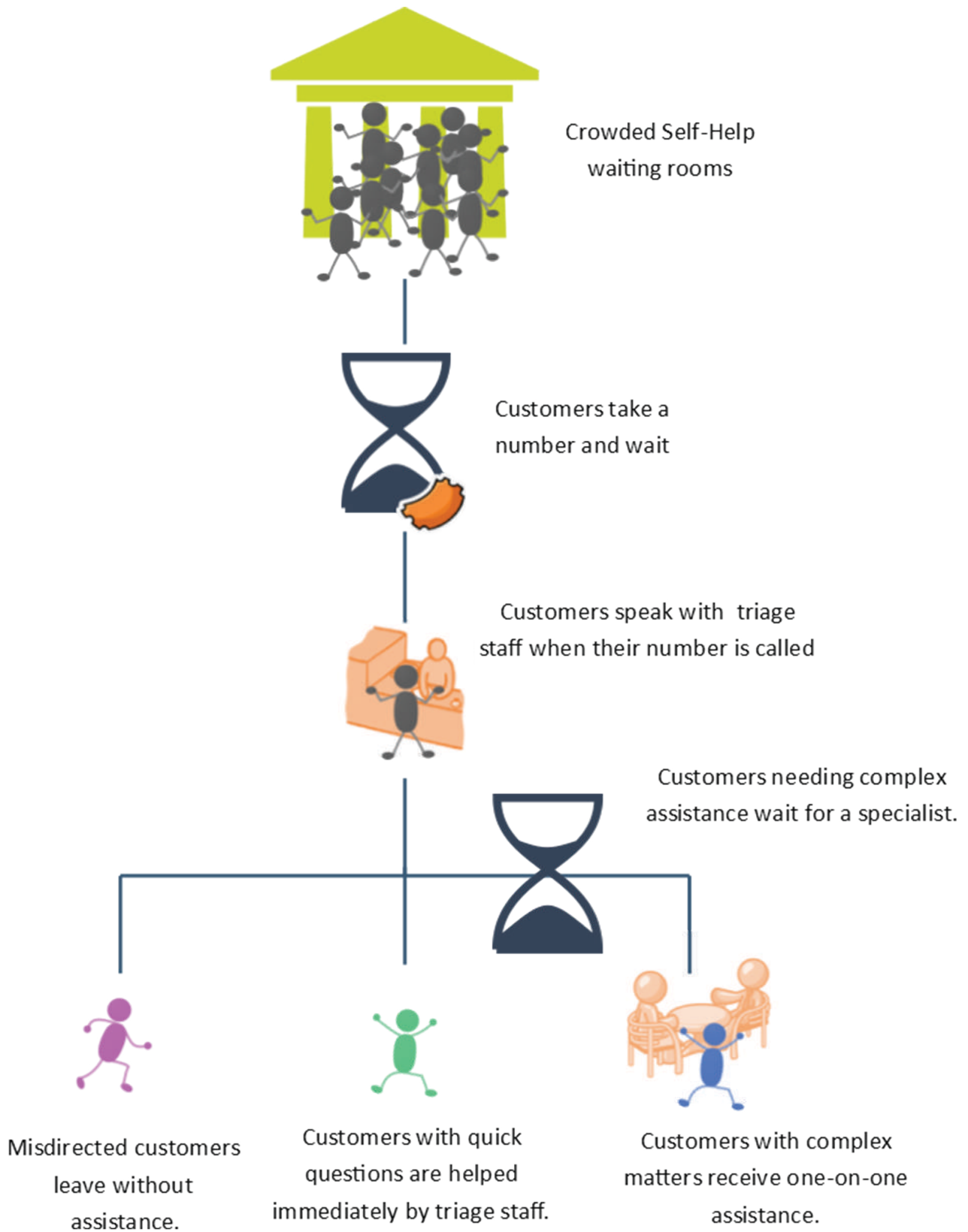


Figure 2: Current Self-Help Customer Process

Barriers to Improving Access to Self-Help Services

As a broad issue, due to the large volume of traffic, customers struggle with long wait times and severe space constraints. The customer survey data show that the customers spend 77 minutes on average to gain services at triage and 111 minutes for one-on-one assistance, including waiting time.²¹ With such long wait times for service, waiting rooms quickly become crowded. One example is the Historic location, which serves the greatest number of customers each year. Here the waiting room seats approximately eight people comfortably and is often completely full, with the overflow extending into the hallway. There is little room to accommodate parents with strollers and those with mobility devices. The hallway is shared with courtrooms and other offices, and people waiting in line can get hit by doors when they swing outward. On one observation day, we saw a man on crutches have trouble getting through the crowded hallway and into the SH center. Once inside, he stood for several minutes before a chair became available.



Picture 1: The Historic courthouse Self-Help waiting room

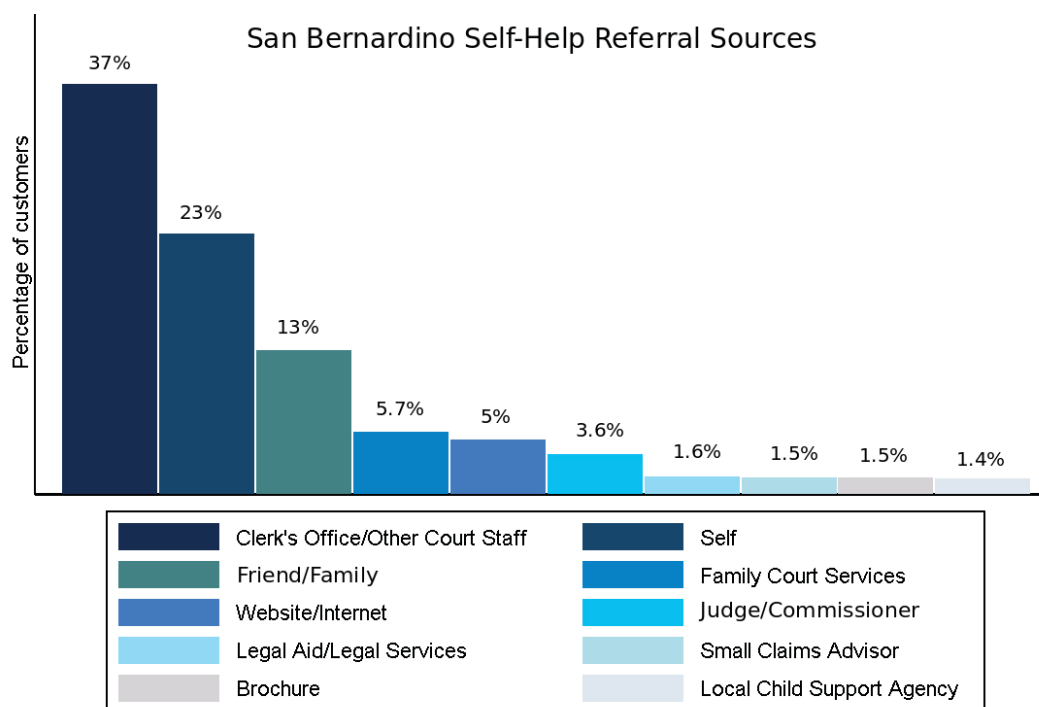
The waiting area then becomes filled with anxious customers who have very little sense of when they can expect help. These conditions can cause customers to leave without service and cause increased frustration for customers, many of whom arrive at the center to address family crises. Moreover, these situations can incur added costs to customers since they may have to take time off from work, pay for child care, and spend extra money on transportation in order to access Self-Help services. In a worst case scenario, a customer may need to make multiple trips to Self-Help due to wait times.

The aim of our project is to address the problems discussed above and ultimately improve access to SH centers. The problems faced by the customers are the aggregate result of several barriers to access. Our research uncovered those barriers, and we identified them as follows:

²¹ “Quick Ticks & Full Page Surveys.” administered January 26, 2016 - February 18, 2016. See Appendix B.

Barrier 1 - Misdirected customers due to insufficient interdepartmental communication

The problem of misdirected customers arose in several interviews with SH center staff members.²² A misdirected customer is referred to the SH center from numerous sources, both inside and outside the courthouse. The most common source of referral, indicated by customers who responded to the Self-Help intake survey, is from inside the court (see Figure 3). Interviews with Self-Help staff suggest that the Court Clerk’s office is the most common intra-court referral, although bailiffs and court volunteers were also specifically mentioned.²³ A separate survey administered through email communications also indicates the Clerk’s office plays a major role in referring customers.



Source: SB Court Survey
 Note: Only customers on first visit for current case

Figure 3: Referral Sources

Several staff interviews²⁴ indicate that there are frequent challenges with interdepartmental communication. Perhaps the most glaring example of the challenges is the frequent referral of customers to SH centers who cannot make use of those services for various reasons (e.g. their case type is not served by SH centers). Another example given by a respondent was when the drop-off window at the Clerk’s office changed its hours of operation.²⁵

²² Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

²³ Ibid.

²⁴ Ibid.

²⁵ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

No notification was given to the SH center, which then mistakenly directed customers with finished paperwork to the drop-off window.

Additionally, respondents mentioned that Self-Help is not always understood by other court employees to be a court department.²⁶ This could be due to inadequate communication between departments, a lack of proper introduction to Self-Help services upon the training of new hires, or the frequent staff turnover in some departments. Some court employees think Self-Help is an outside nonprofit organization similar to Option House, which handles domestic violence restraining orders.²⁷ This misunderstanding manifests itself in different ways. Sometimes Self-Help employees are barred from court employee areas like restrooms until they show their badges. Interactions like these can decrease staff morale and further erode channels of communication.

Barrier 2 - Inefficient web-based services

Currently, Self-Help provides information, forms, videos, and other assistance through their website. However, the information available online is challenging to access. Staff interviews indicate a general feeling that the website is not user-friendly.²⁸ Our team's experience navigating the website also found this to be true. There is much work needed to efficiently provide web based services to SRLs.

- Overall design and content are extremely ineffective. The site relies heavily on text rather than incorporating pictures and videos. The site structure makes it difficult for customers to navigate to information and resources that they need. Headings do not seem to be in a specific order. Some links, like “Start your divorce from home,”²⁹ download PDF files when they deceptively appear to be links to new web pages.
- Self-Help services has just producing videos to aid their customers, but there is no link to the videos from the Self-Help website. The videos are only accessible from the Superior Court's main website, and they feature a person reciting basic information into the camera. They do not include visual aids like an accompanying PowerPoint presentation or examples of correctly filled out forms. Staff interviews indicate that the greatest difficulty customers face is filling out forms,³⁰ but the SH center does not provide tutorial videos to help customers fill them out. Customer surveys show that 57% of customers who received one-on-one assistance used web-based resources.³¹

26 Ibid.

27 Ibid.

28 Ibid.

29 “Self-Help - San Bernardino Superior Court.” Superior Court of California, County of San Bernardino, <http://www.sb-court.org/SelfHelp.aspx>.

30 Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

31 “Intake Survey.” Survey administered by staff at triage station, (2007-2015). See Appendix B.

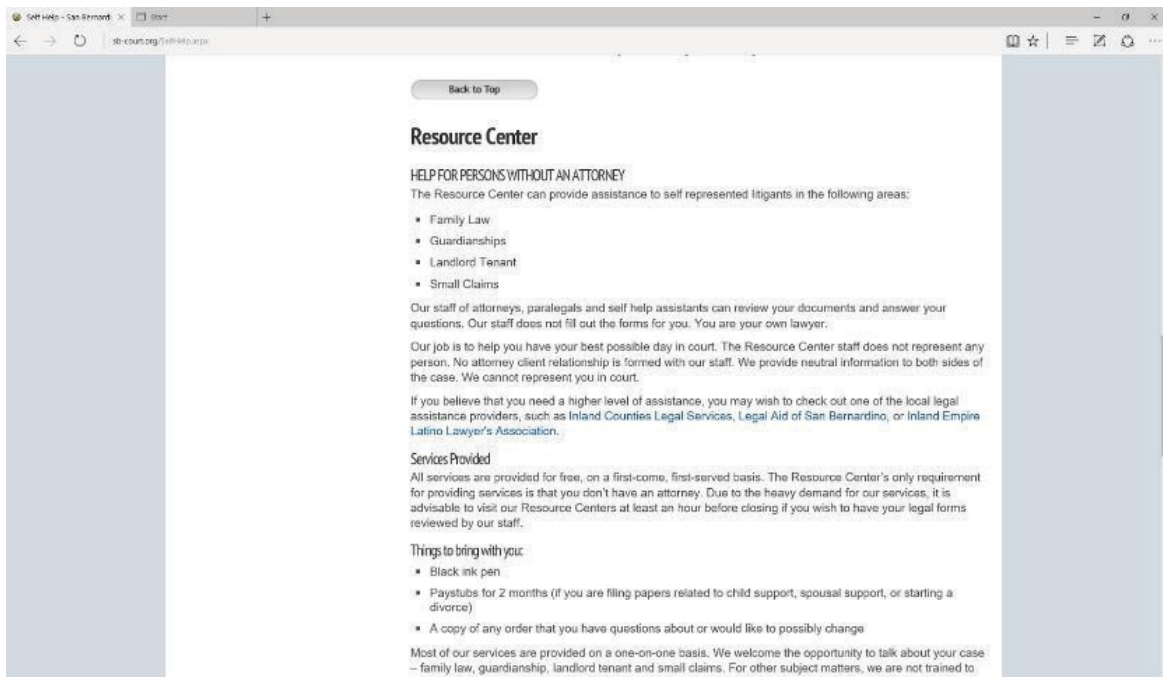


Figure 4: Screenshot of Self-Help website

Among them, only 7% of customers watched the existing videos, although many of them express a willingness to use online videos to assist with case preparation.³²

- External links are disorganized and dispersed, which makes it difficult for customers to find external resources. The site does not make extensive use of online resources from other counties or nongovernmental organizations. It does link to the virtual Self-Help law center maintained by Contra Costa County, but the resources there are clearly dated and the videos require a Microsoft-specific plugin to play properly.

Barrier 3 - Uncomfortable waiting conditions

Many customers must wait for long periods in overflow areas due to crowded waiting rooms. According to one interview,³³ the waiting room accommodates at most about 20 people, but on busy mornings there can be more than 40 people waiting for the doors to open. A significant number of customers are forced to wait in the hallway. We found through observation that the number display in the waiting area could not be seen from the hallway, and some customers did not hear employees call out their numbers due to loud and crowded conditions in overflow areas.³⁴ This situation can make customers uncomfortable and cause them to miss their turn.

³² “Quick Ticks & Full Page Surveys.” administered January 26, 2016 - February 18, 2016. See Appendix B.

³³ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

³⁴ Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.



Picture 2: Customers wait outside the Self-Help center

Barrier 4 - Inefficient service process

Court-provided data show that more than 60% of customers are not served one-on-one but by triage alone,³⁵ which could mean that these customers simply have a brief question. In addition, our observations³⁶ and staff interviews³⁷ reveal that many customers ask about basic information, including how to start a case, the types of cases that SH centers handle, and ways to obtain forms. Staff at triage windows repeat the same basic information throughout the day. However, customers wait for long periods because the current triage process does not differentiate between customers who can be helped quickly and those who need more in-depth service. This in turn exacerbates the problem of limited space within centers by clogging waiting rooms.

SH centers have made efforts to relay basic information through announcements and signage, but these efforts do not appear to be effective. For instance, the SH center posts helpful signage indicating which case types and services are available at the location, as well as suggestions for online help, around the waiting room. However, these are not visible because the room is extremely crowded and customers must stand around the perimeter of the room.

Another example of inefficient processes is the morning announcement that is made upon opening. A paralegal gives the announcement, which covers general housekeeping for

³⁵ Superior Court of California, County of San Bernardino. *Self-Help Quarterly Statistics, 2014-2015*. San Bernardino, CA, 2015. Unpublished Document

³⁶ Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

³⁷ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

the center: the case types for which the location provides services and information on what types of documents can be reviewed. The busy hallway as we mentioned above is loud enough to drown out any announcement made by Self-Help staff, which makes hearing the morning announcement challenging for customers in overflow areas.³⁸

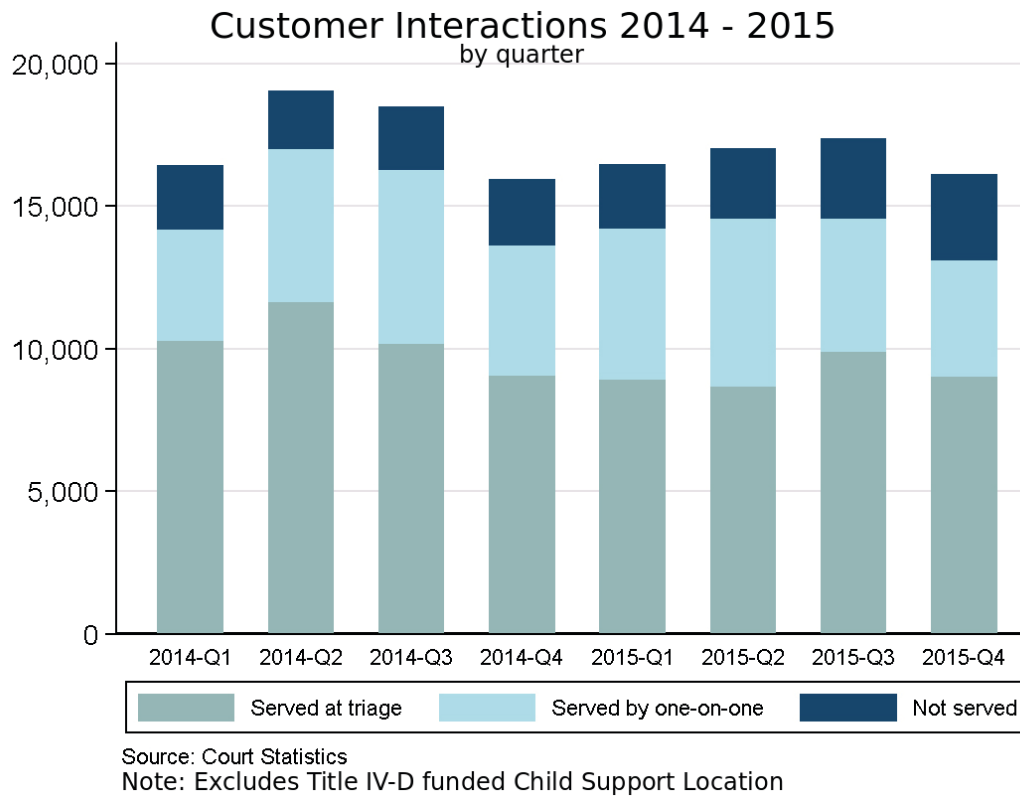


Figure 5: Number of Self-Help interactions

SH centers currently provide one-on-one assistance for customers needing more in-depth service. According to the Self-Help intake survey, the one-on-one assistance model usually requires fifteen to thirty minutes per interaction, which means one paralegal or attorney can serve two to four customers in one hour.³⁹ However, some courts provide assistance in the form of workshops, which serve multiple customers at one time.

Initially, we believed that language barriers may present a problem for SH customers. However, SH centers do not experience much difficulty in meeting the needs of non-English speakers. Some SH centers have employees who speak languages other than English. In cases where someone is not available on-site, the Court has a list of personnel who are available to translate and can be reached by phone.⁴⁰

³⁸ Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

³⁹ "Intake Survey." Survey administered by staff at triage station, (2007-2015). See Appendix B.

⁴⁰ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.



"Service is excellent so grateful to have your services help me."

- anonymous SH customer

EVALUATION CRITERIA

Based on our research findings, we narrowed down the list of possible solutions to the most viable alternatives. These alternatives are discussed in detail in the following section. We evaluated each alternative based on the three following criteria: 1) cost feasibility, 2) political feasibility, and 3) effectiveness. Each alternative received a score of low, medium, or high for each criterion. Our discussions are informed by our literature review, survey results, interviews with staff members and managers, and site observations.

Cost Feasibility

- We evaluated how costly each alternative is in terms of up-front and operational costs of technologies, as well as the cost of employee time spent implementing each alternative. Given that the Court faces severe budget constraints, low cost alternatives, especially in regard to operations, are important. One constraint specified by our client is minimal recurring cost, which ruled out any alternative that would expand payroll.
- We estimated dollar costs through interviews with the court managers and court budget and purchasing staff. We established the following dollar thresholds based on the Court's own procurement guidelines:
- In addition to costs for the Court, Self-Help customers also incur their own costs in obtaining service. It is difficult to accurately estimate the cost in child care, lost wages, and transportation experienced by various customers since these factors affect everyone differently. Ideally, the Court would have methods for estimating these costs, which could then inform decision-making about Self-Help services. This information is currently not available. While we gave weight to these customer concerns in selecting our alternatives, the exact evaluation of customer costs is outside the scope of our project.

Dollar Cost	Feasibility Ranking	Court Guidelines
\$5,000 and below	High	Purchases below \$5,000 are considered <i>de minimis</i> amounts and are exempt from most purchasing procedural requirements.
\$5,001 - \$25,000	Medium	Purchases below \$25,000 permit the court to use “highest scored bid” selection method rather than more stringent requirements for higher-cost purchasing.
\$25,001 - \$250,000	Low	Purchases above \$25,000 trigger the “lowest responsible bidder,” purchasing requirement, limit court discretion, and increase the time to complete the purchase.
\$250,000 and above	Very Low	Purchases above \$250,000 require approval from the Presiding Judge or Judges’ Executive Committee.

Sources for table ^{41 42}

Political Feasibility

- We assessed ease of implementation for alternatives in terms of impacts on other court departments. If the impact of an alternative on other departments is significant, it might conflict with the Court’s priorities. For example, the Court is currently implementing a new case management system. This is a top priority, and alternatives that conflict with it have relatively low political feasibility.
- Buy-in of the Self-Help staff is critical to successful implementation of alternatives. In order to assess the viability of an alternative, we considered the likelihood of staff participation to determine political feasibility.
- Consistency between the Self-Help department’s strategy and the Court’s broader plans affects the feasibility of each alternative. Consistency means there will be a greater willingness and ability to supply resources and time. We also considered the flexibility and durability of each alternative - i.e., its ability to adapt to changing circumstances, such as employee turnover and changes in the economic climate.
- Political feasibility also includes the Court’s relationships with possible partners, such as county officials, bar associations, local government units, and universities.

⁴¹ Judicial Council of California, Administrative Office of the Courts. *Judicial Branch Contracting Manual: Effective October 1, 2011; Revised Effective: July 1, 2015*. San Francisco, CA, 2015. <http://www.courts.ca.gov/documents/jbcl-manual.pdf>.

⁴² Superior Court of California, County of San Bernardino. *San Bernardino Superior Court Authorization Matrix*. San Bernardino, CA, 2015. Unpublished Document.

Effectiveness

We evaluated outcomes and benefits for each alternative in the context of our policy problem. In assigning an effectiveness score, the question we asked was “How likely is this alternative to eliminate the barriers to access we have identified?” Our target outcomes were the following:

- **Reduction in waiting time.** Considering the duration of customer wait times, reducing that time can reduce customers not served and improve access to the SH centers.
- **Increase in substantive services.** An increase in customers served by staff in one-on-one meetings and workshops enables employees to spend more time on substantive case work, rather than spending time redirecting customers or relaying information they can obtain more efficiently elsewhere.
- **Improved experience in the waiting room.** Often customers wait for significant periods in cramped conditions while dealing with highly emotional issues, so improving the waiting room experience is essential. This can decrease the number of customers who leave without service as well as diffuse tension in the waiting room.
- **Increased customer satisfaction.** The quality of SH center services is difficult to measure; it could include everything from ease of access (e.g. how costly was it for the customer to obtain services) to benefits to the court system at large (e.g. whether SRLs who visited the SH center were able to process their cases in court more efficiently). The Court does not have any method of collecting such data. For our purposes, we chose a narrower measure of quality: the level of satisfaction the customer obtained from the services they received.

Effectiveness also includes the **probability of success in implementation and in delivering the desired outcomes.** This was measured through the review of previous initiatives by the court or other similar entities. In some instances the Judicial Council or other county courts have developed pilot projects and programs that are similar to our proposed alternatives. Evaluation of the success and potential pitfalls of these programs were used to rate proposed alternatives, yielding rankings based on our best judgement of the effectiveness of each.



"Is there any way that the wait is not so long; I waited for 2 hours before being helped."

- anonymous SH customer

RECOMMENDATIONS

The barriers we identified through our research gave us insight into developing alternatives. In this section, we propose possible alternatives that the client can employ to address these barriers. In order to improve access to SH centers while decreasing the burden on on-site resources, we set two overarching goals: one is to aid customers mistakenly directed to the SH center; the other is to streamline services. We then developed alternatives under the two overarching goals. The alternatives for the first goal are to **improve interdepartmental communication** and **employee training**. For the second goal, the alternatives are **installing a number display in waiting areas, improving web-based services, creating an internship program, installing a check-in kiosk, playing a welcome video, and implementing a workshop model**.

As shown in Figure 6, our alternatives modify the Self-Help customer flow to 1) increase the off-site resources customers can use, 2) prevent misdirected customers from coming to the SH center, and 3) serve on-site customers more effectively. Then, we assessed them based on three criteria: cost feasibility, political feasibility, and effectiveness. Finally, we summarized our evaluation of the alternatives, concluding with a discussion of current limitations and further steps the Court might wish to take.

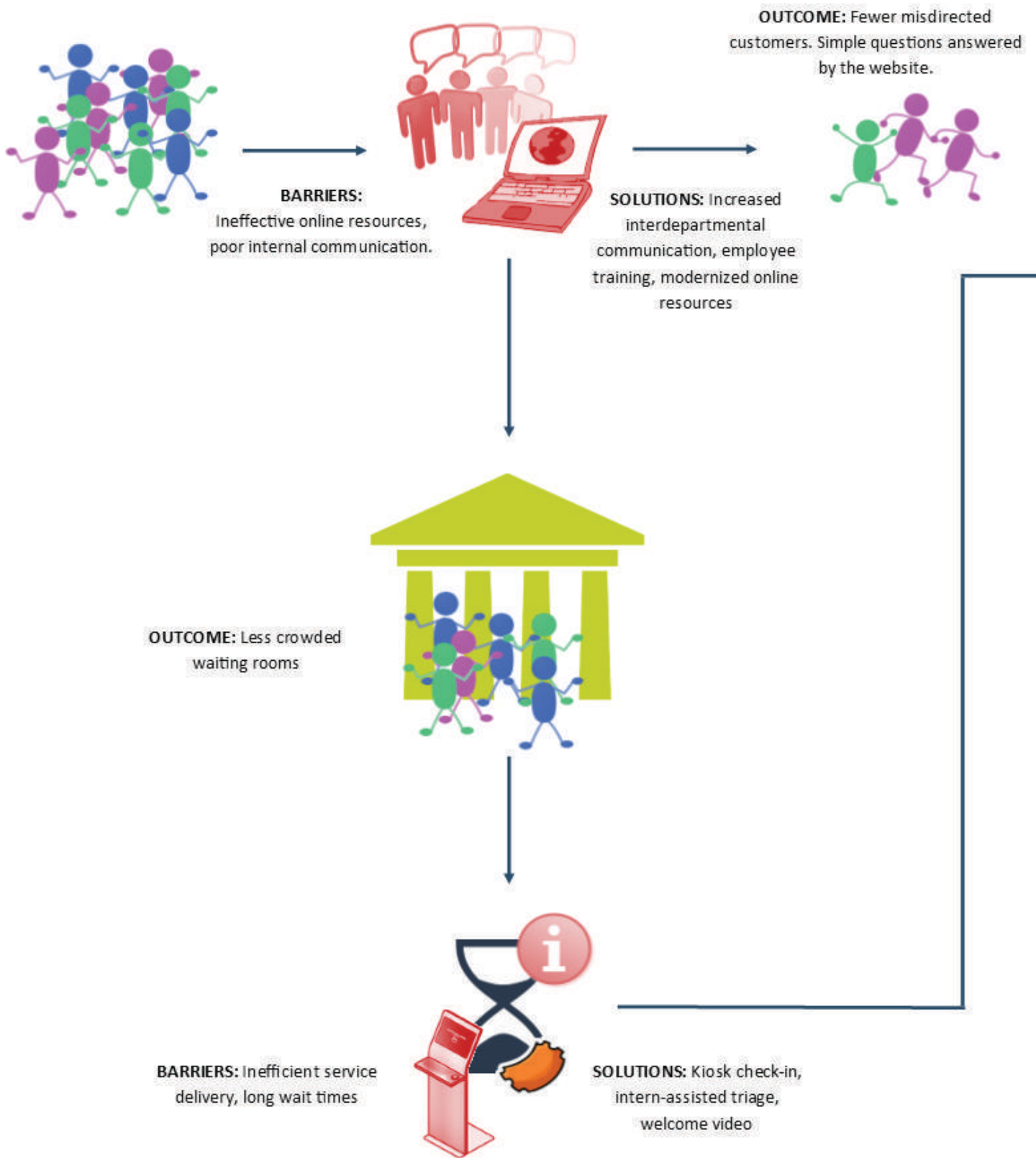


Figure 6: Proposed Customer Flow

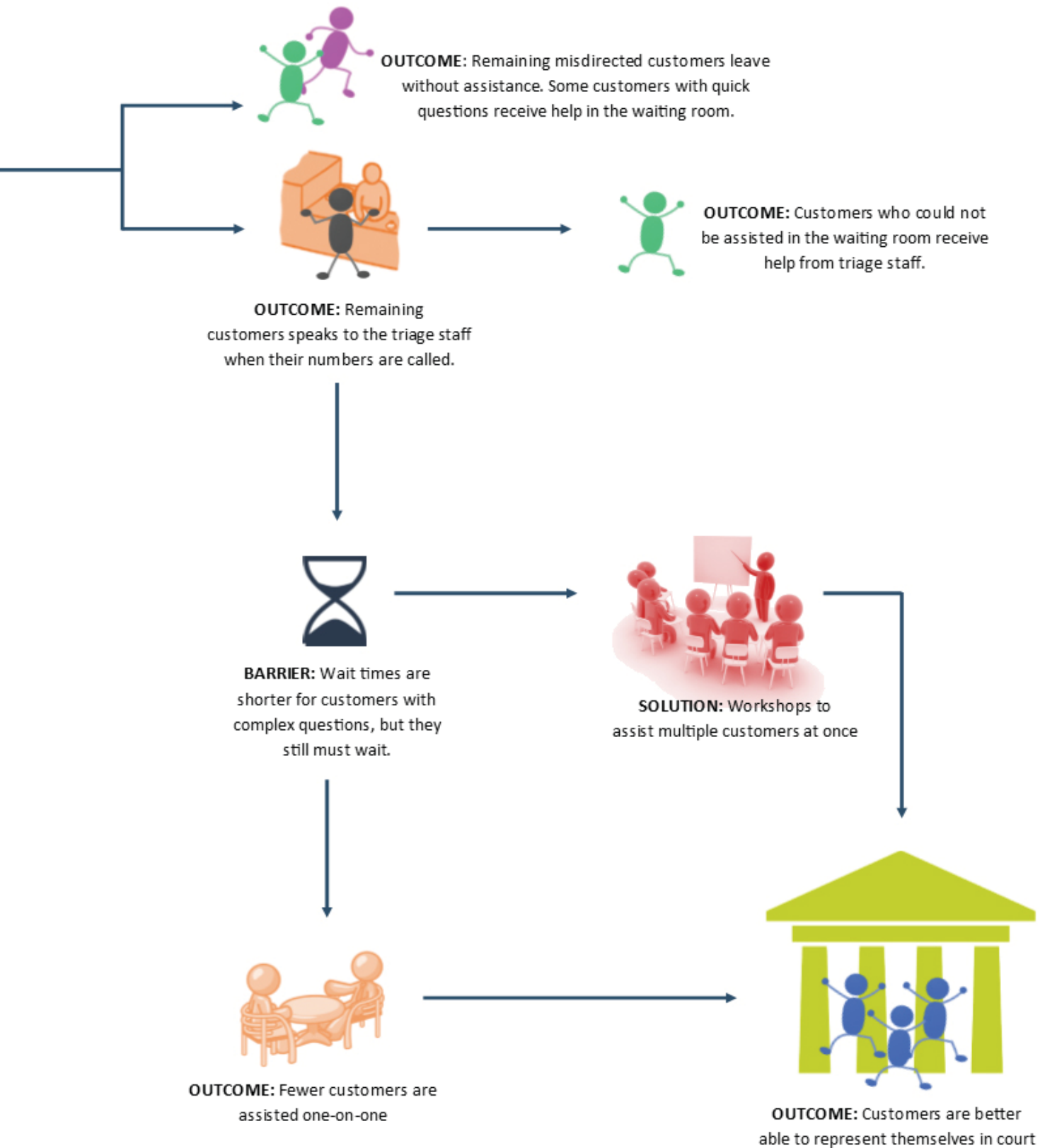


Figure 7 represents a summary of our evaluations of each alternative, which we discuss in more detail later in this section.

Alternative	Barriers Addressed	Overall	Evaluation		
			Cost Feasibility	Political Feasibility	Effectiveness
Goal 1: To Decrease Misdirected Customers					
Improve Interdepartmental Communication	Misdirected customers	Mid	High	Mid	Mid
Additional Employee Training	Misdirected customers	Mid	High	Mid	Mid
Goal 2: To Streamline On-site Services					
Number Display for Overflow Areas	Uncomfortable waiting condition	High	High	High	High
Improved Web-based Services	Inefficient web-based services	Mid	Low	Low	High
Internship Program	Inefficient service process	Mid	Mid	Low	Mid
Kiosk Check-in	Inefficient service process	Mid	Mid	Low	Mid
Welcome Video	Inefficient service process	High	High	High	Mid
Workshop Model	Inefficient service process	High	High	Mid	High

Figure 7: Summary of Alternative Evaluation

Goal 1 - Aid Customers Mistakenly Directed to Self-Help Centers

Our analysis indicates that significant numbers of misdirected customers are referred to SH centers by other court departments. This increases the volume of customers at SH centers, so building relationships with these departments and enhancing their understanding of the SH centers are critical. The alternatives below have the potential to reduce the number of misdirected customers.

Alternative 1: Better Interdepartmental Communication for Reducing Misdirected Customers

As we discussed in the previous section, interdepartmental communication is currently inadequate. Active and frequent communication between departments, especially personnel who communicate with the public (e.g. courtroom clerks, clerks at the service windows, bailiffs), can foster understanding of the purpose and limitations of Self-Help

services for current court personnel. For example, if Self-Help notices a trend of misdirected customers (e.g. an unusually high volume of customers directed to Self-Help for assistance with domestic violence restraining orders), they should contact the referring department to address any confusion, rather than letting the misinformation continue. It would be better for interdepartmental communication to start with supervisors, so as to build a foundation for communication through periodic meetings or/and e-mail. Once the foundation for good communication is established, the scope can be expanded to staff. In addition, a pilot program in another county indicates that outreach to line staff in other departments, beyond managers and supervisors, increases awareness of SH center services.⁴³

Evaluation

This alternative imposes minimal costs because the SH center does not need to invest in any additional technology. Although supervisors and staff members must spend time implementing the alternative, doing so does not require significant time and will have a negligible effect on their ordinary work.

The alternative is ranked **high for cost feasibility** because the dollar cost is minimal, and the amount of staff time required is small.

The first and most significant barrier to implementing this proposal is the need to acknowledge the miscommunications between various court departments. Departments need to invest time in learning about each other's' duties and limitations. The time investment, while small, will still need to be justified. This may be a challenge because all of the Court's departments are short-staffed and may be hesitant to take on more duties.

For example, the SH center has existing outreach initiatives to other departments, such as brown bag lunches.⁴⁴ Unfortunately, utilization of this resource is low. Making the time investment politically palatable requires the other departments to understand that a well-functioning SH center is beneficial for the Court as a whole. Until this understanding is established and effective communication becomes natural, managers and supervisors will have to make communication initiatives a formal priority.

This alternative is ranked **medium for political feasibility** because while the infrastructure to improve interdepartmental communication exists, the political impetus to do so is lacking.

⁴³ Judicial Council of California, Administrative Office of the Courts. *Model Self-Help Pilot Program: A Report to the Legislature*. San Francisco, CA, 2005. Page 103. <http://www.courts.ca.gov/partners/211.htm>.

⁴⁴ Kelly McNamara. Superior Court of California, County of San Bernardino. *Self Help Services Staffing and Service Delivery Models: Today, Tomorrow, and Beyond*. San Bernardino, CA, 2015. Page 7. Unpublished Document.

An increase in effective communication between departments is likely to yield benefits for Self-Help as well as other court departments. In Self-Help, we expect several outcomes: a decrease in misdirected customers, more efficient customer interactions, and enhanced customer satisfaction. Interviews with Self-Help staff indicate that other court departments often send customers to SH centers for services that are not provided by Self-Help (e.g. referrals for restraining orders). These interviews also show a desire on the part of staff to have more effective interdepartmental communication, so Self-Help staff can be kept apprised of relevant information from other departments.⁴⁵ We also know from available the Self-Help intake surveys that about 40% of customers are referred by other court departments.⁴⁶ However, it is not known how many of these referrals are misdirected customers.

Empowering court departments, especially those which have contact with the public, with knowledge of the purpose and limitations of Self-Help translates to fewer customers arriving at an SH center only to find they are in the wrong place. This alternative also contributes to a better-educated public that is prepared for each interaction with Self-Help staff, making efficient and substantive use of SH staff time. This alternative has implications for customer satisfaction; by managing expectations and providing accurate information about court services, the Court can decrease customer frustration. Additionally, Self-Help is not the only court department that benefits from effective communication. SH centers that are well informed about other departments increase customer satisfaction and ease customer interactions with other departments.

This alternative is ranked **medium for effectiveness** because while it addresses the primary source of referrals to SH centers, consideration must be given to the fact that the court does not keep track of how many misdirected customers are referred by other court personnel.

Alternative 2: Improved Integration of Self-Help Services in Employee Training

Currently, the topic of Self-Help is broached in new court employee training. However, the goal of effectively communicating the purpose and limitations of the SH centers is not being achieved. During interviews, staff were not aware that any mention of Self-Help was part of new hire training,⁴⁷ but Human Resources later confirmed that they introduce the department during the training.⁴⁸ Clearly, the information is not being conveyed effectively in

⁴⁵ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

⁴⁶ "Intake Survey." Survey administered by staff at triage station, (2007-2015) See Appendix B.

⁴⁷ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, conducted December 18, 2015 at the Historic courthouse. See Appendix A.

⁴⁸ Staff Development Officer, interview by M. Abesa, February 26, 2016. See Appendix A.

its current format.

Orientation may not be the best place to introduce Self-Help because employees are inundated with too much information. Interviews with Self-Help⁴⁹ and Human Resources management alike acknowledge that trying to impart substantive information about Self-Help during orientation is not optimal.⁵⁰

In order to introduce new court employees to SH centers in a productive and impactful way, Self-Help must work collaboratively with the Human Resources Department to clarify what information should be included in an SH center introduction. If there is too much information to effectively include in orientation, we recommend an introduction to Self-Help, designed and implemented by Self-Help employees. This introduction can be administered in several ways: rolled into existing customer service classes, brown bag lunch conversations, a video posted on the employee intranet, or through email. A well-designed handout or job guide can be issued to employees who frequently field customer questions about Self-Help.

Evaluation

Like the alternative to improve interdepartmental communication, the cost of this alternative is minimal, although it requires the staff time to some extent. The staff time partially depends on how frequently employees are hired in other court departments.

The alternative is ranked **high for cost feasibility** because the dollar cost is minimal while the amount of staff time required is small.

Training employees necessarily takes time away from their day to day duties, so we expect some pushback from departments that are already overburdened. Additionally, formal training channels are limited to classes offered by the Human Resources department for line staff, quarterly supervisor training, and monthly managers' training. Uploading materials to the Court intranet may need the support of Court Technology Services, who might be engaged in the rollout of the new case management system.

This alternative is ranked **medium for political feasibility** because while training channels are available, they are limited in number and scope, and it may be difficult to get on the agenda if there are competing priorities.

This alternative shares many benefits with increasing effective communication and also allows SH staff to interact with other departments and those newly hired.

This alternative is ranked **medium for effectiveness** since it addresses the primary source of referrals, but the number of referrals impacted by this alternative is unknown.

49 Managing Attorney, interview by M. Abesa, February 4, 2016. See Appendix A.

50 Staff Development Officer, interview by M. Abesa, February 26, 2016. See Appendix A.

Goal 2 - Streamline On-Site Services

In addition to aiding customers mistakenly directed to the SH center, streamlining on-site services can make the SH services more effective and efficient. Alternatives we recommend are as follows:



Picture 3: The number display is barely seen in the overflow area

Alternative 3: Number Display for Overflow Areas

Customers in overflow areas cannot always see the number display indicating which number is being served. They also cannot always hear the numbers being called amid the din of active and crowded hallways. This may lead to customers missing their number, or can cause people to crowd into primary waiting areas. We recommend installing an additional number display, visible from overflow waiting areas, to make the flow of service smooth and reduce customer anxiety.

Evaluation

The cost of the alternative is relatively small. It consists of a fixed-cost for purchasing and installing devices. According to information from the Court's purchasing department, the device cost would be approximately \$850.00 for each location, exclusive of installation.⁵¹

⁵¹ E-mail communication with Purchasing Assistant, February 17, 2016 - February 26, 2016. See Appendix

Installation is simple and can be done by court staff.

The alternative is ranked **high for cost feasibility** because the dollar costs are low and it takes a small amount of staff time.

There are no significant political obstacles to installing an additional number display. However, in deciding where to install the additional display in the San Bernardino Historic Courthouse, the Court needs to be mindful of historic conservation requirements.

The alternative is ranked **high for political feasibility** because we do not expect any political resistance.

Installation of an additional number display provides significant and immediate benefits for customers in waiting room overflow areas: reducing customer anxiety, decreasing number of customers who leave without service, and taking customers with special needs, like those with children and disabilities, into consideration. Through time spent observing SH center operations at the Historic location, we found that noise levels in overflow areas made hearing numbers being called difficult, and the number display was not visible more than a few feet outside the main entrance to the waiting room. We also observed several numbers being skipped due to a customer not coming forward, but it is not clear if the customer departed prematurely due to the challenges presented by waiting in overflow areas or for other reasons.

This alternative is ranked **high for effectiveness** since it simply and effectively addresses challenges that make waiting for service unpleasant for customers. However, we do not know how many customers leave without receiving help due to unfavorable conditions in the overflow areas. There may be other reasons for their departure (e.g. they obtained an answer elsewhere, they had to leave for another appointment).

Alternative 4: Improve Web-based Services

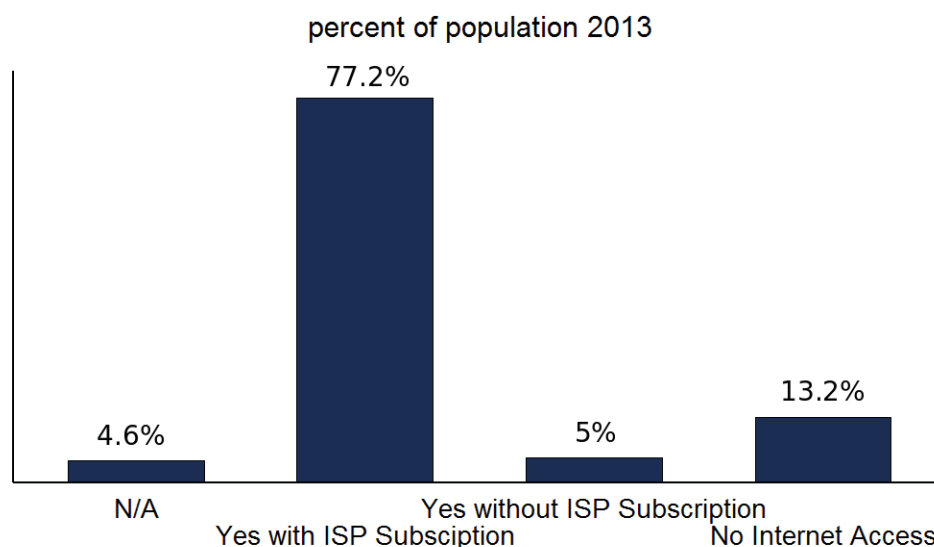
Web-based services have the potential to improve access to SH centers without increasing the burden on on-site resources. This will help customers by providing information essential to SRLs. Additionally, in the light of San Bernardino's vast geographic area, web-based services help those living far from SH centers. Another consideration for increasing access through web-based resources is how residents access those resources. During our observation days we noted the consistent use of smartphones and other mobile devices in the waiting room.⁵² The free Wi-Fi available throughout the court facilitates this usage. Census

A.

⁵² Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

data⁵³ and court-administered surveys⁵⁴ indicate the prominent use of mobile computing technologies. Any changes to the SH center website should be optimized for mobile including the videos which can be made available through a platform like YouTube which has a mobile application. In addition to making the customer experience better mobile optimization also leads to higher rankings in Google searches,⁵⁵ making Self-Help more visible in web searches. There are several online tools the Court may employ to test the performance of mobile optimization like Google’s Mobile-Friendly Test.⁵⁶

Internet Access in San Bernardino County



Source: IPUMS Minneapolis: University of Minnesota 2015

Figure 8: Internet Access in San Bernardino County

Our recommendations to improve web based resources are mainly divided into three categories: (1) reorganize the site structure, (2) increase substantive content, and (3) add functionality, such as online chat services or expanded e-mail assistance. We recommend the creation of a working group to propose content for web-based services. The working group should include SH center staff and a project manager from Court Technology Services. Customers should also be included in the design process to ensure the services are practical and will be used. There must also be a clearly defined timeline for completion within the next year. The Court has already invested resources in gaining a better understanding of technology weaknesses, and these resources should be utilized.

53 Steven Ruggles, Katie Genadek, Ronald Goeken, Josiah Grover, and Matthew Sobek. *Integrated Public Use Microdata Series: Version 6.0* [Machine-readable database]. Minneapolis: University of Minnesota, 2015.

54 “Full Page Surveys.” administered January 26, 2016 - February 18, 2016. See Appendix B.

55 David, Fern. “Is Your Site Mobile-Friendly?” General Services Administration digitalgov.gov, October 23, 2015, <http://www.digitalgov.gov/2015/10/23/is-your-site-mobile-friendly/>.

56 Ibid.

Reorganize website structure

When customers look at the website, their primary concern is how to address their particular case; to a customer engaged in an eviction dispute, information about divorce is merely clutter. Organization of website content should prioritize case types and feature these prominently. Links indicating case types should also include “tooltips” to make it easier for customers to understand what each case type covers. For example, it might not be clear to a customer that an eviction problem is called an “Unlawful Detainer” case by the Court, or that control of a minor’s estate by someone other than his or her parents would be called “Guardianship” as opposed to falling under “Family Law.” It is critical that this translation from layperson terms to Court terminology happen early in the process so customers can get the pertinent information quickly. Forms, sample forms, tutorial videos, and FAQ for each case type should be located under sites for each case type (See Figure 9). Likewise, general external links such as links to Legal Aid and the law library should be centralized, while case specific external links such as Child Support Services should be shown under each case type.

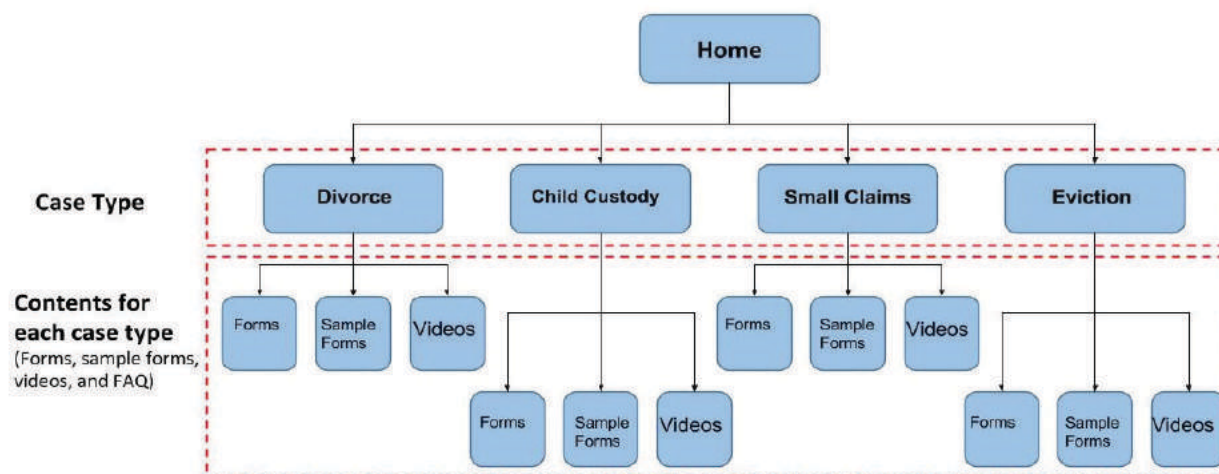


Figure 9: Proposed restructuring of the Self-Help website

In order to make the website user-friendly, the SH center should incorporate more pictures and visual aids while reducing the amount of text. One example for Self-Help to reference is the International Revenue Service (IRS) website, which prioritizes primary customer concerns at the top of the main page, integrates visual aids, and is generally well-organized (See Figure 10). The website must also clearly indicate which links will download PDF files. This will increase ease of use and benefit customers who do not access the web through a traditional internet service provider. Further, some website elements may not display correctly on mobile devices, so the Court should consider mobile optimization.

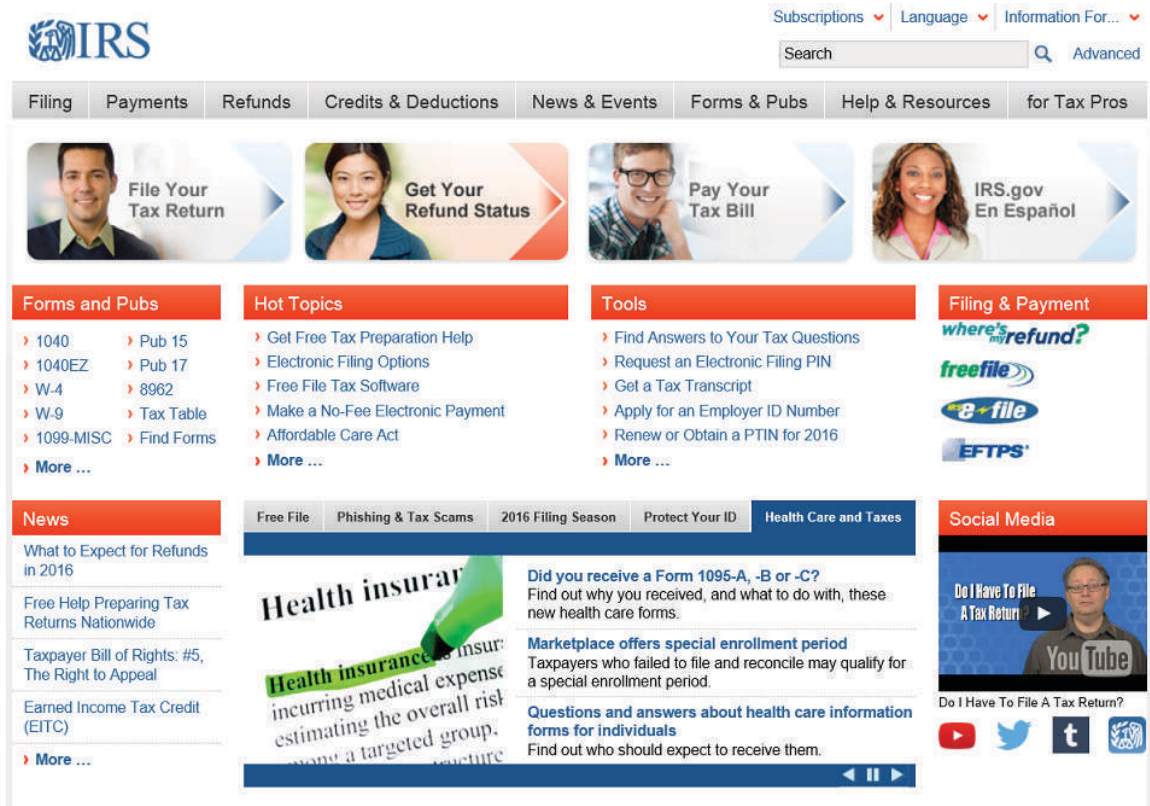


Figure 10: Screenshot of the Internal Revenue Service's website

Increase substantive content

Based on interviews with staff,⁵⁷ customers seem to have the most difficulty with filling out forms, though the Court provides sample forms at Document Control. We recommend providing tutorial videos, organized by case type, to help customers fill out forms in addition to the video providing basic information the SH center has created. These videos should incorporate visual aids like sample forms to assist customers that are more visual learners.

Add functionality

While the SH center already provides email services and 33% of customers that responded online survey have used email services.⁵⁸ Through staff interviews we learned that SH centers provide individual assistance to customers via email and phone.⁵⁹ Staff members reply to emails as they arrive, and they take turns responding. Helping customers via phone is slightly more complicated. Staff assist customers by phone only on designated days from a quiet, off-site location. This is done off-site because SH centers can be noisy, which makes phone interactions challenging. Staff interviews also indicate that the number of phone calls

⁵⁷ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

⁵⁸ "Online survey." administered January 4, 2016 - February 23, 2016. See Appendix B.

⁵⁹ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

has increased.⁶⁰ These things suggest that a certain portion of customers tend to use remote services. Thus, we recommend online chat assistance in addition to email services, which provides more interactive and real-time services as well as enables employees to assist more than one customer simultaneously.

Evaluation

This alternative, which includes revamping the website, developing videos, and optimizing the website for mobile devices, requires significant dollar costs. According to the Court purchasing department, the Court previously paid approximately \$41,000 to redevelop the entire court website.⁶¹ Also, they spent \$3,000 for four videos (total video time of approximately 20 minutes) similar to the type we would recommend to introduce Self-Help services.⁶² This alternative requires the input of Self-Help staff to develop content as well as Court Technology Services (CTS) to implement. Fortunately, both departments have already begun exploring changes to the court wide website as the result of an ongoing project. Building on the already available research and planning saves time to some extent.

The alternative is ranked **low for cost feasibility** since it requires significant dollar costs and demands a relatively large amount of the staff time. It should be considered, however, that the Court has already invested some of this staff time in its own assessment of the website.

The challenge for this alternative will be competing priorities. When changes to the website are done in-house, CTS coordinates with the relevant departments to make changes or updates to their respective pages on the website. This takes a significant amount of time from CTS. Even if the Court opted to contract with an external vendor to overhaul the website, CTS staff would still have to write the scope of work and oversee contract performance. At the time of this writing, the Court is rolling out a new case management system, a massive undertaking that demands first priority from CTS staff. Improvements or changes to the website that require anything more than minimal effort from CTS will likely have to wait until the transition to the new case management system is complete or at least on a stable trajectory.

This alternative is ranked **low for political feasibility** because the Court's current work demands make improvements to the website a non-priority for the foreseeable future.

This alternative addresses several identified problems at SH centers: crowded waiting rooms, long wait times, and ineffective external communication. According to customer surveys 78% of Self-Help customers feel very comfortable or somewhat comfortable using

60 Ibid.

61 E-mail communication with Purchasing Assistant, February 17, 2016 - February 26, 2016. See Appendix A.

62 Ibid.

the internet to aid in case preparation, and 46% prefer to use online services in place of on-site services.^{63 64} It should be noted that the Court administers these surveys both on-site and online, so respondents are probably more likely to feel comfortable using technology. Additionally, census data available from IPUMS show that about 77% of county residents have some form of internet access,⁶⁵ but it is unclear if that population accurately represents Self-Help customers. It is also worth noting that the on-site intake survey reveals that the number of customers referred by the internet/website has increased more than 400% since 2007.⁶⁶

An easily navigable website with digestible content for SRLs directly addresses the problems of crowded waiting rooms and long on-site waiting times by enabling customers to complete the bulk of their paperwork at home. This translates to fewer visits to SH centers for customers. Additional benefits to customers include more flexibility around work and child care scheduling since customers can access most web services at any time rather than being limited to SH center hours of operation. This alternative also begins to address the SH center's lack of external communication. An easy to navigate website that contains tools the public can understand and use practically is one of the most fundamental ways Self-Help can interact with San Bernardino residents. In other words, the website is the public face of Self-Help and, by extension, the Court.

The alternative is ranked **high for effectiveness** since it addresses pressing on-site challenges while also yielding customer service benefits.

Alternative 5: Develop a Robust Internship Program

Self-Help is currently seeking interns to aid in service delivery. Our recommendation is to develop an internship program based on the JusticeCorps model, but tailored to the needs and resources of the county. Current outreach efforts are targeted toward trade colleges with programs like paralegal training. This is a good first step that begins to cultivate potential new hires for the Court. What is missing is outreach to undergraduates who might be interested in legal careers. The University of Redlands, University of California at Riverside, and California State University at San Bernardino have significant undergraduate populations that may be interested in going to law school.

Our research took us to Los Angeles County which has an active JusticeCorps program that includes undergraduates considering law school. These interns actively engage in hands

63 "Full Page Surveys." administered January 26, 2016 - February 18, 2016. See Appendix B.

64 "Online survey." administered January 4, 2016 - February 23, 2016. See Appendix B.

65 Steven Ruggles, Katie Genadek, Ronald Goeken, Josiah Grover, and Matthew Sobek. *Integrated Public Use Microdata Series: Version 6.0* [Machine-readable database]. Minneapolis: University of Minnesota, 2015.

66 "Intake Survey." Survey administered by staff at triage station, (2007-2015). See Appendix B.

on work with the SH center by assisting with workshops, customer triage, and document preparation. Although JusticeCorps is a beneficial program, it does have its downsides. First is a requirement for matching funds from the host agency. Second is a three-year application cycle which closed recently. Finally, JusticeCorps is a part of AmeriCorps, and has strict criteria to qualify for the program.

San Bernardino should develop its own internship program that adopts the strengths of JusticeCorps while being specifically tailored to the unique needs of the county. To date, the Court has implemented only intermittent, small-scale, and informal internships. Our recommendation of a more robust program would require a more systematic approach. In order to attract and retain high-caliber interns who are invested in the SH centers, the program would offer the opportunity for substantive work, responsive supervision, consistency, and longevity.

Evaluation

This alternative does not require expenditure through procurement. However, it does require management and staff time to develop the program and to recruit, train, and supervise interns after developing it. Using the JusticeCorps training model as a standard in LA County, we see a month-long investment in training interns, who will then contribute substantial staff support throughout the remainder of the year. In the long run, the savings in staff time overcomes the initial staff time investment for implementation and training.

The alternative is ranked **medium for cost feasibility** because though it needs the staff to implement, the saving staff time by the intern program balanced out the required staff time in the long term.

While internships work very well in Los Angeles County, this success may be difficult to implement in San Bernardino. There are fewer colleges and universities to serve as a pool of potential interns, and the Court has fewer institutional connections and resources. It will take plenty of outreach for the Court to continue to develop viable relationships. In addition, internship programs at Self-Help need to be formalized using a written agreement between the Court and the sponsoring institution (e.g. colleges). The development of a written agreement needs to comply with the Court's contracting procedures, which will take a significant amount of time unless the internship agreement is prioritized. There may also be labor issues with the local employee unions.

This alternative is ranked **low for political feasibility** because while the Court has proven willing to recruit interns, it also requires the cooperation of and investment from parties outside the Court's direct control.

An internship program may offer long-term benefits while providing solutions to some challenges in Self-Help. Interns can be used to perform duties that require less specialized knowledge, allowing SH staff to efficiently assist customers with more complex needs. Observation showed that Self-Help staff are extremely busy throughout the day.⁶⁷ Interns provide some level of staffing relief, although the performance of individual interns will determine the level at which SH centers can rely on them for relief. Another benefit of a Self-Help internship program is that it can be tailored to that department's needs. The program would also be flexible, and could be adapted to changing circumstances throughout the county. This flexibility is useful in two alternatives mentioned below, kiosk check-in and workshops, where interns can be used to augment these options, but the options are not contingent on them. Long term, a well-regarded internship program is a stellar recruitment tool, and generally raises the public profile of Self-Help and the Court. Although there are substantial benefits to this alternative, there are potential challenges. One is the quality of intern, particularly in the early years, attracted to Self-Help. We believe that reaching out to several types of institution, including community colleges, professional schools, and 4 year universities, would provide enough variety to allow for the selection of qualified candidates, but that is not guaranteed.

The alternative is ranked **medium for effectiveness**. The program directly leads to more effective delivery of service and augments other alternatives, but successful implementation is both complex and uncertain.

Alternative 6: Changes to Triage

Kiosk check-in

For the current flow of services at SH centers, triage plays a key role in screening customers. Yet, both customers who are misdirected or have just a brief question and customers who need more extensive service must wait in the same way. Changing the flow of service can streamline services. Thus, we recommend installing automated check-in system like kiosks. Dividing the service flows into two main flow (one deals with customers that have a brief question, another serves customers that need more extensive service) can reduce waiting time, and free up paralegals for one-on-one customer interactions.

Kiosks allow the SH center to track customer cases enabling the SH center to provide more effective services, and track case outcomes. Moreover, the kiosks offer an opportunity to change how customers wait for service. Cell phone numbers can be registered at check-in, so customers can be notified when their number is about to be called. This is particularly helpful

⁶⁷ Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

for customers with children because they can take their kids outside to play while waiting for service. This quiets the waiting rooms and reduces crowding.



Picture 4: The triage window at the Self-Help center in the Historic courthouse

Evaluation

Considering that the up-front cost and the annual maintenance cost for the five jury kiosks the Court has installed were around \$6,300 and \$600 respectively,⁶⁸ installing kiosks at the SH centers will likely entail non-negligible procurement costs. This alternative also requires the manager from CTS and the SH center staff to determine how they can guide customers to services through kiosk software.

The alternative is ranked **medium for cost feasibility** considering that the cost would fall within the \$5,000 to \$25,000 cost threshold and taking into account the staff time needed to develop content.

As with all alternatives involving CTS staff, the challenge will be one of prioritization. CTS time will be required to work with Self-Help to define kiosk functionality and to oversee procurement and contract implementation. The procurement and implementation process itself will need to comply with the Court's formal contracting procedures. Depending on the size of the kiosk, there may also be additional demands on Court Facilities staff.

⁶⁸ E-mail communication with Purchasing Assistant, February 17, 2016 - February 26, 2016. See Appendix A.

This alternative is ranked **low for political feasibility** because it places demands on departments currently facing competing priorities.

Using staff with specialized Self-Help knowledge to sort customers is an inefficient use of time. Observation of the Historic location showed two paralegals dedicated to triage due to the high volume of customers.⁶⁹ Kiosk check-in frees staff to use their skill to assist customers with more involved problems. Observation also demonstrated that, in an effort to be fair, customers are seen in the order of their arrival.⁷⁰ This means that simpler cases cannot be processed quickly which contributes to overcrowding in waiting rooms. Observation showed that long waiting times and crowded waiting rooms present particular problems for customers with children.⁷¹ Kiosks offer useful amenities to address these problems: the ability to sort and assign customers to staff based on need, and to offer text message or email notification when a number is about to be called.

Additionally, combining the use of kiosks with interns augments service delivery. Interns can aid customers in using the kiosks, which will ease the transition away from staff-centered triage. Interns would also be available to answer quick questions from customers, which prevents customers from waiting extended periods to ask simple questions. This would reduce long lines and crowding in waiting rooms. Finally, kiosks provide SH centers with an additional way of gathering information about their customers and allow for better tracking of outcomes. One example of this is tracking customer wait times from check-in to completion of business. There are several metrics Self-Help does not currently track which would aid in judging the effectiveness of service delivery, and some of this information could be obtained with little extra effort through kiosks.

As with any new technology, the initial introduction presents challenges. Customers may be unwilling to use a kiosk to check in or have difficulty using the technology. Resistance to change is expected, but this will make implementation difficult without either an intern or staff member to assist customers. The possibility for resistance especially pertains to returning customers or those referred by friends who remember the old style of doing things.

The alternative is ranked **medium for effectiveness** since it addresses several problems faced in Self-Help but faces challenges at implementation, especially without the incorporation of an intern.

Using interns to triage customers

Currently, more than half of customers are served at triage. Though they do not need

⁶⁹ Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

⁷⁰ Ibid.

⁷¹ Ibid.

one-on-one assistance, they have to wait for a long time. Interns can play a pivotal role, either on their own or in conjunction with kiosks, in the triage process. One option in incorporating interns into triage is to have them responsible for a customer sign-in sheet that records customer arrival time, case type, and purpose for the customer's visit. This leads to a better triage system that prioritizes intern interaction with customers who can be helped quickly over those who must wait for individual attention from staff. Interns can freely walk the floor of the waiting room and address issues as they arise. They can also prevent misdirected customers from waiting extended periods before finding out they are in the wrong department. Finally, using interns to assist in triage allows paralegals to spend more time working with customers one-on-one. This use of interns can be part of the proposed internship program, which is evaluated in the previous section.

Welcome Video

Though the SH center currently gives the morning announcement and posts some posters in the waiting area to convey basic information, the staff constantly repeat the same basic information to customers upon reaching the intake window. This information includes: the rule that customers must fill out forms on their own, the list of case types served at a given location, and the fact that customers can get sample forms at the Document Control.⁷² To address this, we recommend producing a video to be played repeatedly in waiting area. The video will answer questions frequently asked at triage. It should state customers' responsibility as SRLs and the case types that the SH center can serve, as well as refer customers to web-based resources so that they can access these on their mobile devices while waiting for service.

Evaluation

The welcome video necessitates costs for both video production and installation of a monitor to play the video. During our discussion of improvements to the website, we noted that the Court recently paid \$3,000 for four informational videos. Creating the welcome video at the same time as the tutorial videos means the costs could be relatively low. Additionally, the cost of the monitor itself is not significant; a 40-inch monitor costs less than \$500.00.⁷³ This alternative also requires the manager from CTS and the SH center staff to determine what kind of information customers need to know from the welcome video and how the information should be visualized.

The alternative is ranked **high for cost feasibility** since the cost would be less than \$5,000 while demanding a fair amount of staff time.

⁷² Observation at Historic Court location conducted by Rie Kudo and Michelle Cordi, December 15 & 17, 2015.

⁷³ E-mail communication with Purchasing Assistant, February 17, 2016 - February 26, 2016. See Appendix A.

There are no significant political constraints for this alternative. The majority of the work involved is limited to the Self-Help department itself. However, in deciding where to install the monitors playing the Welcome Video in the San Bernardino Historic Courthouse, the Court needs to be mindful of historic conservation requirements.

The alternative is ranked **high for political feasibility** since there are few political barriers to implementation.

The welcome video is a way to offer the basics so customers have realistic expectations of what can be accomplished on their visit. They will also find out more quickly when they are in the wrong place. While we believe the welcome video will address problems currently found in SH centers, its effectiveness remains unclear. Customers pay little attention to posted signage, so it is possible they will also ignore the video. The looping video may also cause aggravation for customers left in the waiting room for long periods.

The alternative is ranked **medium for effectiveness** since it addresses common problems at SH centers, but may be disregarded by the customers it is meant to help.

Alternative 7: Develop a workshop model

A workshop is a class on a specific case type or process. This model is a more efficient service-delivery mechanism because it enables the SH center to serve multiple customers with similar issues simultaneously. It has proven to be successful in other courts, including Los Angeles and Riverside. During our visit to the Riverside SH Center, one attorney conducted a divorce workshop that served twenty people in about two hours, though they do not have a standard duration for workshops. We observed that the workshop covered a significant amount of material related to one case type, including how to fill out forms and what customers can expect to happen once the forms are filed. The customers were able to ask questions and complete forms during the workshop.⁷⁴ Similar to Riverside, LA County offers workshops with one presenter and an intern assistant for six to ten people in one hour.⁷⁵

Given space constraints at SH center locations, the workshop model may require additional space or the rearranging of current spaces, but this will optimize the number of customers Self-Help is able to serve. SH staff should develop both walk-in and scheduled workshops for the most common case types. The Court should also consider broadcasting those workshops to other court locations. For example, a workshop could be hosted in San Bernardino and broadcast real-time to Victorville, with an SH staff member in Victorville proctoring the attendees. This would allow for questions during the workshop. The Court could

⁷⁴ Site visit to Riverside Superior Court Self-Help by M.Abesa, M.Cordi, and R. Kudo: February 19, 2016.

⁷⁵ Site visit to Los Angeles Superior Court Self-Help, Stanley Mosk Courthouse by M.Abesa, M.Cordi, and R. Kudo: February 5, 2016.

even consider partnering with non-court entities such as law libraries, public schools, or city councils to broadcast the workshop in non-court locations. This would help resume customer service in places like Chino and Needles, where the Court was forced to close shop due to budget cuts. Additionally, the Court should consider posting workshops online, for customers to view at their convenience.

Evaluation

This alternative requires staff time for development and administration of the workshop. However, the current one-on-one assistance model usually requires 15 – 30 minutes per interaction,⁷⁶ which means one paralegal can serve 2 – 4 customers in one hour. If a one-hour workshop with one paralegal and interns can serve five customers or more, the time saved would overcome the staff time to implement this alternative. If the Court broadcasts workshops to other court locations and non-court entities, it would require additional technology costs (e.g. quality video conference hardware).

The alternative is ranked **high for cost feasibility** since it can increase the number of customers that are served by per staff without significant dollar costs.

The Court has a history of using the workshop model, so this is not going to be a completely foreign implementation. The Self-Help staff have also spoken positively of the workshop model as implemented in the Riverside Superior Court.⁷⁷ This would imply at least some measure of employee support for the workshop model. However, shifting to a workshop-first paradigm would be a significant change in the day-to-day operations of Self-Help, and this will likely result in some pushback in the early stages of adoption. The greater political challenge would be if the Court decided to try to broadcast the workshops in Court facilities so as to reach people in underserved areas like Needles. In that case, the Court would need buy-in from host facilities such as law libraries or city offices. Space constraints are another issue faced by several Self-Help locations since holding workshops requires a seating area for multiple customers. Finding additional space to hold workshops may prove challenging depending on the location.

This alternative is ranked **medium for political feasibility** because although we have seen some local support for the idea, the major changes to Self-Help's operation and daily duties suggest that the department might experience some resistance. Additionally, broadcasting the workshops to areas where the Court has no direct presence requires buy-in and invest from parties outside the Court's control.

⁷⁶ "Intake Survey." Survey administered by staff at triage station, (2007-2015) See Appendix B.

⁷⁷ Self-Help Center Staff, interviews by M. Cordi and R. Kudo, December 18, 2015 at the Historic courthouse. See Appendix A.

Site visits to other county SH centers show the workshop model to be an efficient way of communicating the information SRLs need to complete their cases.^{78 79} Further, workshops do not preclude one-on-one assistance, but may make those interactions more productive by better educating customers prior to individual meetings with staff. Self-Help locations only deal with a limited number of case types, so workshops would address issues relevant to large numbers of customers, which can reduce on-site waiting times. However, the personal nature of individual cases may make some customers uncomfortable when learning in a group setting. This complication can be avoided by communicating to customers that they need not disclose any personal information to the group. Another consideration is that the ability to broadcast to other locations or broadcast online means the SH centers can reach a much larger audience. This includes residents that are more than 100 miles from the nearest courthouse. Of course, broadcasting also presents its own problems. Offering the workshops at non-court entities requires either that court staff travel to broadcast locations to offer additional assistance to customers in attendance or that the Court partner with another entity to provide a workshop proctor. Broadcasting via the internet could cause problems for people unfamiliar with the technology. However, broadcast capability is an additional option for the alternative rather than being a core requirement for success.

The alternative is ranked **high for effectiveness** since it provides relevant information efficiently to numerous customers. Although there are potential downsides to this approach they mainly stem from technology associated with broadcasting the workshops.

Overall Rankings

We evaluated each alternative based on our criteria. Since the alternatives are not mutually exclusive and address different barriers, we ranked each alternative on its own merits rather than prioritize them against each other. To do so, we weighted each criterion equally; took the average by replacing “Low” with 1 point, “Medium” with 2 points, and “High” with 3 points; and obtained an overall score for each alternative. The overall score range of 1.0 – 1.66 is ranked low, 1.67 - 2.33 is ranked medium, and 2.34 - 3.0 is ranked high. As shown in Figure 7, we clarify barriers addressed by each alternative and summarize evaluation results.

A high overall ranking means that the alternative can be implemented easily and can have significant positive impacts in terms of barriers addressed. The alternatives presented may be implemented together or individually, as the Court sees fit. Some of the alternatives are enhanced by other alternatives (e.g. using intern in conjunction with kiosk check-in). Though

⁷⁸ Site visit to Riverside Superior Court Self-Help, by M.Abesa, M.Cordi, and R. Kudo: February 19, 2016.

⁷⁹ Site visit to Los Angeles Superior Court Self-Help, Stanley Mosk Courthouse, by M.Abesa, M.Cordi, and R. Kudo: February 5, 2016.

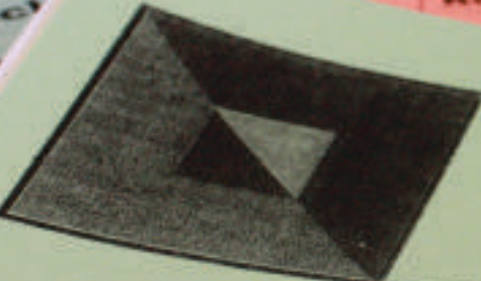
the client might be able to work on implementing several alternatives at the same time, limited resources may necessitate focusing on one or two at a time. We recommend focusing on the alternatives ranked higher as the first step.

Summary of Alternatives and Evaluations

Alternative	Barriers Addressed	Overall	Evaluation		
			Cost Feasibility	Political Feasibility	Effectiveness
Goal 1: To Decrease Misdirected Customers					
Improve Interdepartmental Communication	Misdirected customers	Mid	High	Mid	Mid
Additional Employee Training	Misdirected customers	Mid	High	Mid	Mid
Goal 2: To Streamline On-site Services					
Number Display for Overflow Areas	Uncomfortable waiting condition	High	High	High	High
Improved Web-based Services	Inefficient web-based services	Mid	Low	Low	High
Internship Program	Inefficient service process	Mid	Mid	Low	Mid
Kiosk Check-in	Inefficient service process	Mid	Mid	Low	Mid
Welcome Video	Inefficient service process	High	High	High	Mid
Workshop Model	Inefficient service process	High	High	Mid	High

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Resource Center -- Doors Open:
San Bernardino: Mon. to Thurs.
8:30am to 12:00pm & 1:30pm to 5:00pm
Fridays: 8:30am to 12:00pm
Rancho :
Victorville:
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r Re
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for
Divorce Starte
RESOURCE CENTE
San Bernardino Superi
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Resource Center -- Doors Open:
San Bernardino: Mon. to Thurs.
8:30am to 12:00pm & 1:30pm to 5:00pm
Fridays: 8:30am to 12:00pm


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RESOURCE CENTE
San Bernardino Superi
Use Black Ink!
Resource Center -- Doors Open:
San Bernardino: Mon. to Thurs.
8:30am to 12:00pm & 1:30pm to 5:00pm
Fridays: 8:30am to 12:00pm
Rancho :
Victorville:
Joshua Tr

"All the staff was very professional, kind, helpful, and friendly! It makes the situation better and less stressful."

- anonymous SH customer

PROJECT LIMITS & NEXT STEPS

The scope of this project was limited by the lack of data from the Court. For example, customer costs could not be assessed because the court had not been tracking customer wait times or travel distances. The impact of the Self-Help center on the Court as a whole and to the outcome of the customer's case (only in so far as completion/conclusion, *not* legal success) could be better measured if the Court tracked interactions in the Self-Help center through the life of the associated case. The Court will have to take measures to respect customer privacy and prevent undue bias, but such studies have been successfully completed in other counties.

Going forward, the Court should decide which aspect of Self-Help performance it would like to improve (e.g. ease of physical access, customer satisfaction, accuracy of information, speed of service) and invest in obtaining the pertinent data. The surveys the Court implemented to support this study should be continued, because they will provide the Court with the data necessary to assess the effectiveness of any adopted alternatives and make adjustments if necessary.

Further, we recommend that the Court improve its external communications strategy. Our findings show a significant amount of misinformation reaching the Court's constituents; this is a problem that the Court should actively address. The Court should also reach out more actively to potential partner agencies who can assist in improve Self-Help services, such as county bar associations and nearby universities. An external communications strategy is attached as Appendix G.

CONCLUSION

The Self-Help center plays an important role in the court system by providing access to the justice system for self-represented litigants who face potentially life-changing situations without the aid of an attorney. Our analysis finds two overarching problems at Self-Help locations that interfere with service delivery: misdirected referrals and inefficient on-site processes. This project seeks to address barriers the Court faces which prevent Self-Help from reaching the greatest number of people who need assistance with their cases. Our group hopes this analysis aids the Court in finding solutions that ultimately increase access to justice for San Bernardino County residents by providing them with accurate, substantive information that can be accessed both in person and online.



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APPENDIX A

List of Interviews

Name	Position	Date Conducted	Conducted By
Alan Crouse	Deputy Court Executive Officer –Technology and Facilities, San Bernardino Superior Court	February 10, 2016 (videoconference)	Maria Abesa, Michelle Cordi, Rie Kudo
Alicia Billalobos	JusticeCorps Graduate Fellow	February 5, 2016	Maria Abesa, Michelle Cordi, Rie Kudo
Brenda Martin del Campo	Administrative Analyst, San Bernardino Superior Court	December 18, 2015; February 26, 2016	Michelle Cordi, Rie Kudo; Maria Abesa
Bryan Borys	Special Assistant to the CEO, Los Angeles Superior Court	February 5, 2016	Maria Abesa, Michelle Cordi, Rie Kudo
Debra Meyers	Deputy Court Executive Officer – General Counsel, San Bernardino Superior Court	February 10, 2016 (videoconference)	Maria Abesa, Michelle Cordi, Rie Kudo
Emily Chirk	Administrative Analyst, San Bernardino Superior Court	February 16, 2016 (email)	Maria Abesa
Espee Randle	Operations Manager, San Bernardino Superior Court	March 4, 2016	Maria Abesa
Gina Wilson	Staff Development Officer, San Bernardino Superior Court	February 26, 2016	Maria Abesa
Joseph W. Doherty	Director, Empirical Research Group, UCLA School of Law	November 6, 2015	Maria Abesa, Michelle Cordi, Rie Kudo
Kathleen Dixon	Managing Attorney, Los Angeles Superior Court	February 5, 2016	Maria Abesa, Michelle Cordi, Rie Kudo
Kelly McNamara	Managing Attorney, San Bernardino Superior Court	February 4, 2016	Maria Abesa

Pamela Peery	Managing Attorney, Riverside Superior Court	February 19, 2016	Maria Abesa, Michelle Cordi, Rie Kudo
Patricia Rich	Staff Attorney, Riverside Superior Court	February 19, 2016	Maria Abesa, Michelle Cordi, Rie Kudo
Self-Help Staff (6)	Self-Help Staff, San Bernardino Superior Court	December 18, 2015	Michelle Cordi, Rie Kudo
Sharon Sundy	Contract Administrator, San Bernardino Superior Court	January 29, 2016, February 17, 2016 (email)	Maria Abesa
Tricia Pierson	Purchasing Assistant, San Bernardino Superior Court	January 29, 2016 – February 17, 2016 (email)	Maria Abesa
Zav Yaroslavsky	County Supervisor (retired), Los Angeles County	February 29, 2016	Michelle Cordi

APPENDIX B

Survey Forms

a. Quick Ticks Survey

We are committed to providing equal access to Self-Help services to the residents of San Bernardino County. Please take a moment to answer a few questions to help us improve the customer experience. Thank you!

1. Overall, how satisfied were you with the service you received today, with 1 being VERY UNSATISFIED and 5 being VERY SATISFIED? (Circle a number)

1 2 3 4 5

2. How can we improve our services?

3. If the Self-Help Center offered online videos to assist with the preparation of your case, would you use them? 1 being DEFINITELY NO and 5 being DEFINITELY YES. (Circle a number)

1 2 3 4 5

4. About how much time did you spend at the Self-Help Center today? _____ hours

b. Full Page Survey

Customer Survey for Self-Help Services

We are committed to providing equal access to Self-Help services to the residents of San Bernardino County. Please take a moment to answer a few questions to help us improve the customer experience.

1. [Survey taker can answer] Location of the Self-Help center

San Bernardino Historic Victorville Joshua Tree Fontana Barstow Child Support

2. How many people came with you to the Self-Help center today? _____ people

3. Did you come to the Self-Help center with your children? Yes No

4. About how much time did you spend at the Self-Help Center today? _____ hours

5. How did you hear about Self-Help services? (Please check all that apply)

Court Clerk Judge or Court Officer Sheriff or Police Family or Friend
 Flyer Internet Other: _____

6. If you checked "Flyer" and/or "Internet" in Question 5, where did you see the flyer or which site did you visit on the internet? (Please describe it.)

7. Before coming to the Self-Help center, what if any online resources did you use? (Please check all that apply)

Superior Court Website (San Bernardino County)
 Superior Court Website (Other County) Which County? _____
 Legal Aid or other nonprofit website Legal Document Service website (like Legalzoom.com)
 Law Library website

8. If you used the Superior Court website, what services did you use? (Check all that apply)

General information Download online form packets Online form preparation Videos

9. If you used the Superior Court website, please rate the ease of use for the website.

Very Easy Somewhat Easy Neutral/ Don't Know Somewhat Difficult Very Difficult

10. How comfortable do you feel using the Internet for assistance with your case?

Very Comfortable Somewhat Comfortable Neutral Somewhat Uncomfortable Very Uncomfortable

11. How do you access the internet? (Check all that apply)

Smart Phone or Tablet Home Computer Library or other Public Access
 Work/School Computer FedEx Kinkos, Internet Cafe or other paid source No Internet Access

12. If the Self-Help center offered online videos to assist with the preparation of your case, would you use them?

Definitely Yes Probably Yes Undecided Probably No Definitely No

13. Would you prefer to use online help, such as videos and sample forms, rather than coming to the Self-Help center in person?

Definitely Yes Probably Yes Undecided Probably No Definitely No

14. Where do you plan to print court documents, if required?

At home At a library or other public resource
 At Staples, FedEx Kinkos, Office Depot or other paid retailers
 Other: _____

15. Overall how satisfied were you with the service you received?

Very Satisfied Satisfied Neutral Unsatisfied Very Unsatisfied

c. Online Survey

Customer Survey for Self-Help Services

We are committed to providing equal access to Self-Help services to the residents of San Bernardino County. Please take a moment to answer a few questions to help us improve the customer experience.

*** Required**

Which Self-Help services did you use or locations did you visit for your current case? *

Please check all that apply

- Website
- E-mail
- Phone
- San Bernardino Historic Courthouse
- Victorville Courthouse
- Joshua Tree Courthouse
- Fontana Courthouse
- Barstow Courthouse
- Child Support Courthouse

What type of case did you seek help with? *

- Family Law
- Guardianship
- Small Claims
- Eviction, Landlord, or Tenant
- Child Support

How did you hear about Self-Help services? *

Please check all that apply

- Court Clerk
- Judge or Court Officer
- Sheriff or Police
- Family or Friend
- Flyer
- Internet
- Other: _____

If you checked “Flyer” and/or “Internet” in the previous question, where did you see the flyer or which site did you visit on the internet?

Please describe it.

What is your primary language? *

What language are you most comfortable speaking?

- English
- Spanish
- Other: _____

Were you helped by the Self-Help center in your primary language? *

- Yes
- No

If you visited a Self-Help center, how many MILES did you travel to get there? _____ MILES

If you visited a Self-Help center location, what type of transportation did you use to get there?

- Car
- Public Transit
- Other: _____

How comfortable do you feel using the Internet for assistance with your case?

Very Comfortable Somewhat Comfortable Neutral Somewhat Uncomfortable Very Uncomfortable

How do you access the internet?

Please check all that apply

- Smart Phone or Tablet
- Home Computer
- Library or other Public Access
- Work/School Computer
- FedEx Kinkos, Internet Cafe or other paid source
- No Internet Access

Where do you plan to print court documents, if required?

Please check all that apply

- At home
- At a library or other public resource
- At Staples, FedEx Kinkos, Office Depot or other paid retailers
- I do not have access to a printer
- I do not need to print documents at this time
- Other: _____

Overall how satisfied were you with the service you received?

Very Satisfied Satisfied Neutral Unsatisfied Unsatisfied

Do you have any suggestions to improve our service?

d. Intake Survey

* County Code <input type="text"/>	* Location <input type="text"/>	* Date <input type="text"/>	* Required Fields								
Staff Name <input type="text"/>	Staff Type <input type="text"/>	UniquelD <input type="text"/>									
			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Edit</td> <td>Find</td> <td>Add</td> <td>Delete</td> </tr> <tr> <td colspan="2">Print</td> <td>Undo</td> <td>Close</td> </tr> </table>	Edit	Find	Add	Delete	Print		Undo	Close
Edit	Find	Add	Delete								
Print		Undo	Close								

Customer Intake

1. What is your gender?

Male

Female

3. What is your race or ethnic group? (Single Response Section)

American Indian/Alaska Native

Asian

Black/African American

Hispanic/Latino

Native Hawaiian/Other Pacific Islander

White

Multiple Response (Go to Question 4)

Other

4. If you selected Multiple Response in Question 3 for Race/Ethnic Group, check all that apply below:

American Indian/Alaska Native

Asian

Black/African American

Hispanic/Latino

Native Hawaiian/Other Pacific Islander

White

Other

2. Where do you live?

This County

Another County in California

Another State

Another Country

5. What is the primary source of your individual income?

None--No Income

Employment

Unemployment Benefits

Public Assistance, CalWORKS, TANF

Retirement, Social Security, Pension

Disability (Non-Retirement)

Other

6. What is your individual monthly income before taxes?

No Income

\$1000 or less

\$1001 to \$2000

\$2001 to \$3000

\$3001 to \$4000

\$4001 to \$5000

More than \$5000

7. What language do you feel most comfortable speaking?

English

Spanish

Armenian

Cambodian

Cantonese

Hmong

Korean

Mandarin

Russian

Vietnamese

Other

THIS SECTION (QUESTIONS 8-14) IS FOR STAFF USE ONLY

8. What is the mode of service?

In-Person Drop-In

In-Person Appt.

Telephone

Fax/Mail/E-mail

Videoconference

9. What is the place of service?

Family Law Facilitator's Office

Self-Help Center

10. Other

Is the customer currently incarcerated?

Is the customer currently active duty military?

11. Customized Questions

Option1

Option2

Option3

12. How many times has the customer been to a FLF's Office/SHC in California?

This is My First Visit

1 Other Visit

2 Other Visits

3 Other Visits

4 Or More Other Visits

13. How many times has the customer been here regarding this case/pending matter?

This is My First Visit

1 Other Visit

2 Other Visits

3 Other Visits

4 Or More Other Visits

14. Referrals (Check all that apply)

A. Who referred the customer here today?

Brochures/Pamphlets

Clerk's Office/Other Court Staff

DV Advocate/Battered Women's Shelter

Family Court Services

Friend/Family

Housing Service

Judge/Commissioner

Lawyer Referral Service/Private Attorney

Legal Aid/Legal Services

Local Child Support Agency

Mediation Service

Other Community-Based Organization

Other Facilitator

Self

Small Claims Advisor

Website/Internet

Other

B. Where did you refer the customer to today?

Clerk's Office/Other Court Staff

DV Advocate/Battered Women's Shelter

Family Court Services

Housing Service

Lawyer Referral Service/Private Attorney

Legal Aid/Legal Services

Local Child Support Agency

Mediation Service

Other Community-Based Organization

Other Facilitator

Small Claims Advisor

Website/Internet

Other

APPENDIX C

Self-Help Center Observation Form

Please fill out observation form every half-hour. Then write observations of the room and surroundings on the back of form for 15 minute periods between 8:30am - 2 pm.

Observer: _____ Date: _____ Time: _____ Court Location: _____

Waiting room _____

Overflow _____

Was there enough seating for those waiting? yes no

If not how many people were standing? _____

Was there overflow into hallways/outside center? _____

Were areas for filling out forms crowded? _____

Describe the demeanor of waiting customers. _____

What is the prevalence of smart phone or tablet use among customers waiting for service? _____

Did any physical altercations occur? Please describe _____

Did any verbal altercations occur? Please describe _____

Did staff have difficulty making themselves heard? _____

Did staff members repeat the same information? _____

Were there any problems of access for disabled or elderly? _____

How many people appear confused by the process of getting service? _____

Did you witness people turned away because their case is for another SH location?

How many? _____

Did you witness people turned away because the SH center does not handle their case type?

How many? _____

Did you witness people turned away who needed legal advice?

How many? _____

Did you witness people leave without service without making contact with an employee?

How many? _____

APPENDIX D

San Bernardino Self-Help Locations Flyer

<h1 style="text-align: center; color: blue; text-decoration: underline;">Superior Court Self Help Locations & Hours</h1>	
<p>San Bernardino Historic Courthouse <i>Help with Family Law & Guardianship Cases</i> 351 N. Arrowhead Ave. (3rd Floor, Room 326) San Bernardino, CA 92415</p> <p>Victorville Courthouse <i>Help with Family Law, Guardianship, Small Claims, & Eviction Cases</i> 14455 Civic Drive, Suite 100 (Next to V-9) Victorville, CA 92392</p> <p><u>SPECIAL DAY FOR GUARDIANSHIP PETITION HELP:</u></p> <ul style="list-style-type: none"> • Tuesdays for San Bernardino • Wednesdays for Victorville 	<p><u>Hours For San Bernardino & Victorville:</u></p> <p>Mondays – 5 Minute Family Law Clinic Day No document review on Mondays <i>Visit us Tuesday through Thursday for document reviews.</i></p> <p>Tuesday through Thursday (all services) <i>Hours: 8:30 am to 12:00 p.m. & 1:00 pm to 3:00 pm</i></p> <p>Fridays – Closed to the public</p>
<p>Child Support Division <i>Help with Government Child Support Cases</i> 655 W. 2nd St. (2nd Floor Self Help/Facilitator) San Bernardino, CA 92415</p>	<p>Monday - Thursday <i>8:30 am to 12:00 p.m. & 1:00 pm to 3:00 pm</i></p> <p>Friday mornings** 8:00 am to 12:00 pm (closed 1st Friday on even months)</p>
<p>Fontana Courthouse <i>Help with Small Claims & Eviction Cases</i> 17780 Arrow Blvd. (2nd Floor by F9) Fontana, CA 92335</p>	<p>Monday - Thursday <i>8:30 am to 12:00 p.m. & 1:00 pm to 3:00 pm</i></p> <p>Fridays – Closed to the public</p>
<p>Barstow Courthouse <i>Help with Family Law, Small Claims, & Eviction Cases</i> 235 E. Mountain View St. (1st Floor, Room 109) Barstow, CA 92311</p>	<p>Tuesdays ONLY <i>9:00 am to 12:00 pm</i> <i>1:00 pm to 3:00 pm</i></p>
<p>Joshua Tree Courthouse <i>Help with Family Law primarily</i> 6527 White Feather Rd. (Jury Assembly Room) Joshua Tree, CA 92252</p>	<p>2nd & 4th Friday of the month ONLY <i>9:00 am to 12:00 pm</i> <i>1:00 pm to 3:00 pm</i></p>
<p>Self Help by EMAIL: seifhelpforms@sb-court.org smallclaims@sb-court.org landlordtenant@sb-court.org fworkshop@sb-court.org childsupportselfhelp@sb-court.org</p>	
<p>Self Help by PHONE: Family Law & Guardianships (909) 269-8826 or (800) 722-1853 Small Claims and Landlord/Tenant (909) 708-8606 or (800) 634-9085</p>	
<p>Revised 09/02/15 ** 800 Numbers Only Work When Dialed Outside 909 Area Code **</p>	

APPENDIX F

Riverside Self-Help Workshop Schedule

Riverside Superior Court - Family Law Workshops & Clinics				FEBRUARY 2016	
CLINIC DESCRIPTIONS	Monday	Tuesday	Wednesday	Thursday	Friday
<p>Family Law Clinic: Help with child/spousal support issues; paternity; DCSS cases; custody/visitation; getting or modifying court orders; form review, & explanation of court orders. NEW Daily 8:00am & 1:00pm</p> <p>NEW Spanish Family Law Clinic: Help with child/spousal support issues; paternity; DCSS cases; custody/visitation; getting or modifying court orders; form review, & explanation of court orders. 8:30am-3:00pm RFO Petition Packet / RFO Response Packet</p> <p>Judgment Clinic: Review completed default judgments or judgments by agreement. Bring all of the paperwork filed & all orders made in your case.</p> <p>FAMILY LAW WORKSHOP DESCRIPTIONS</p> <p>NEW (EPR) - Petition/Response: Required for people who are not married and are starting or responding to a Paternity Action, includes on filling-in all of the required paperwork, and an in-depth review of the court process. 2 hours EPR Petition Packet/ EPR Response Packet</p> <p>Divorce Petition/Response: Required for people starting or responding to a Divorce/Legal Separation; includes complete instruction on filling-in all of the required paperwork, and an in-depth review of the court process. 3 Hours Petition Packet/Response Packet</p> <p>Default Judgment: Required when filing a judgment when the other side has NOT responded to the petition. You must bring all of the paperwork you have filed. 2 ½ hours Default Judgment Packet</p> <p>Judgment by Agreement: Required when both a Petition and Response have been filed & both parties are in complete agreement on all issues (custody/visitation, support and property/debt division). 2 ½ hours Judgment by Agreement Packet</p> <p>Mandatory Settlement Conference (MSC): Get help preparing for your Mandatory Settlement Conference, including how to complete Financial Disclosure Documents and the Settlement Conference Statement. 2 ½ hours Workshop form packets are available online http://www.riverside.courts.ca.gov/selfhelp/familylaw.shtml</p>	<p>1. Spanish/En Español Petition/Response 8:30 am</p>	<p>2.</p>	<p>3. Petition/Response 9:00am Night Workshop Petition/Response 4:30 pm</p>	<p>4. NEW Spanish/ En Español Family Law Clinic 8:30am-3:00pm</p>	<p>5. NEW (EPR)Pet/Resp & RFO 9:30 am</p>
	<p>8 Spanish/En Español Default 8:30 am</p>	<p>9. NEW (EPR)Pet/Resp & RFO 9:30 am</p>	<p>10. Default 9:00am Night Workshop Default 4:30 pm</p>	<p>11. Spanish/En Español MSC 8:30 am</p>	<p>12. HOLIDAY</p>
	<p>15. HOLIDAY</p>	<p>16.</p>	<p>17. Petition/Response 9:00am Night Workshop Petition/Response 4:30 pm</p>	<p>18. MSC 9:00 am</p>	<p>19. Judgment by Agreement 9:00am Judgment Clinic Dissolution; Review/Correct 1:00pm to 3:30pm</p>
	<p>22 NEW Spanish/ En Español Family Law Clinic 8:30am-3:00pm</p>	<p>23. NEW (EPR)Pet/Resp & RFO 9:30 am</p>	<p>24. Default 9:00am Night Workshop Default 4:30 pm</p>	<p>25. Spanish/En Español Judgment By Agreement 8:30 am</p>	<p>26. Computers Available. No Facilitator or Paralegal Assistance</p>
	<p>29. Day Workshop Self-Help Center 3535 10th Street, 2nd Floor Riverside, CA 92501</p>		<p>Night Workshop Victor Miceli Law Library, 3989 Lemon St. Riverside, CA 92501 RESERVATIONS BY EMAIL REQUIRED FOR NIGHT WORKSHOPS ONLY. RiversideFamilyLawWorkshop@riverside.courts.ca.gov</p>		
	<ul style="list-style-type: none"> Space is limited to the first 15 participants. El espacio es limitado a 15 participantes. Must arrive 30 minutes early to start the required form packet. Se requiere llegar 30 minutos antes de iniciar el taller para preparar el paquete requerido. Workshops & Clinics are subject to change without prior notice. Talleres y clinicas están sujetas a cambios sin previo aviso. 			<ul style="list-style-type: none"> Children are not permitted at workshops or clinics. No se permite traer niños a los talleres o clinicas. Bring case number, all paperwork filed, all orders made & a pen. Tenga disponible su número de caso, todo documento archivado, ordenes emitidas y una pluma. 	

APPENDIX G

External Communications Strategy

Most residents only come into contact with the court system for two reasons: jury duty and when they are in crisis. Neither of these situations lends itself to the development of a positive relationship between the court and the people it serves. Like many government agencies, the court functions under extreme fiscal constraints, operates well below capacity, and is forced to make difficult decisions on how to disposition resources. Realignment, and the ire it drew from the community, is a prime example of the staggeringly difficult choices the court must make, and only serves to underline the need for a comprehensive external communications strategy. The Court should see external communications as both a buffer in bad times and a platform to praise its achievements and those of its employees. Cultivating relationships with elected official, media, and the public is a way to ensure the relevance and success of Self-Help in the long term. Outreach is not simply a tool to aid Self-Help Resource centers in continuing their work, but has benefits for Superior Court in San Bernardino.

Goals

- **Inform** the public on happenings at the court & cultivate public support
- **Increase open and active dialogue** with nongovernmental organizations in San Bernardino
 - Legal Aid and IELLA
 - United Way
- **Enhance relationships with other county agencies**, especially those working with populations which can benefit from Self-Help services
- **Build reputation** and demonstrate to the community the hardworking and caring professionals that comprise the staff at the court
- **Increase the agency profile with elected representatives** at the state and local level
- Demonstrate the essential nature of services that benefit self-represented litigant in order to **attract funding** or to insulate the department in lean times
- **Attract talent** to the court
- Cultivate relationships with **local media and bloggers**

Strategy

General Strategy

- Hire a PR professional with experience in public agencies, preferably someone with a

legal background

- They should be able to interact with all court employees and provide trainings to management and line staff about how to speak with the press
- Generate public interest stories for distribution to both traditional and social media outlets
- Take advantage of public service announcements (PSAs) to publicize Self-Help
- Develop a working group that meets regularly to discuss how best to ensure equal access to the justice system for residents of the county
 - Chaired by the Presiding Judge or other high level court executive to show that Superior Court is serious about the dialogue
 - relevant court employees
 - Kelly McNamara
 - Include a mid-level manager and a staff representative
 - Superior Court Judge
 - Judges have shown resistance to some Self-Help initiatives in the past. Their concerns must be understood and their support must be encouraged.
 - Representatives from the Board of Supervisors, state Senate and Assembly, city government, public defender, and social service agencies
 - Provides a good opportunity to hear the needs of people in areas where court services are sparse or nonexistent
 - Include Bar Association, IELLA, and equal justice NGOs
 - Include nonprofits geared toward child welfare like United Way

Other Governmental Officials and Agencies

- Reach out to other county agencies working with populations which can benefit from Self-Help services
 - Department of Child Support Services
 - Department of Child and Family Services
 - Department of Public Health
 - Sheriff's Department
 - Public Defender's Office
- Communicate with the Board of Supervisors, City Councils & State Legislators

Nongovernmental Organizations

- Continue building relationships with local colleges like University of Redlands, Cal State San Bernardino, University of La Verne and Chaffey. Consider going further afield to UC Riverside.
 - Support internship program
 - Workforce Development
- Encourage long term partnerships with Legal Aid, Inland Empire Latino Lawyers Association, and other similar organizations through frequent contact and by collaborating on projects like Self-Help workshop development.
- Initiate and maintain contact with United Way of San Bernardino