



SOUTH CENTRAL REGIONAL CONFERENCE ON PRO SE LITIGATION



ANNOTATED AGENDA

THURSDAY, FEBRUARY 1, 2007

Hilton Americas Hotel, 1600 Lamar Street
Room 335AB

6:15-7:00 pm **Cash Bar Reception**

7:00 pm **Group Dinner**

7:45 pm **Introductions**

Neal R. Sonnett, Esq.
President, American Judicature Society

Welcome

James J. Alfini, Dean
South Texas College of Law, Houston

Honorable Harriet O'Neill
Justice, Texas Supreme Court

8:00-8:30 pm **Keynote Address**

Why We Should Care About Self-Represented Litigants

Hon. Jess H. Dickinson, Justice
Mississippi Supreme Court



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FRIDAY, FEBRUARY 2, 2007

South Texas College of Law
1303 San Jacinto (2 blocks from hotel)

- 7:30 AM** **If you wish**, meet in the lobby of hotel to walk together 2 blocks to South Texas College of Law, 1303 San Jacinto
- 7:45-8:15 am** **Continental Breakfast**..... E.S. Dining Room, 6th Floor
- 7:45-8:30 am** **Registration** G.T. Atrium, 1st Floor
- 8:20-8:30 am** **Conference Overview**..... G.T. Auditorium
Kathleen Sampson
Project Director, American Judicature Society
- 8:30-9:45 am** **PLENARY A** G.T. Auditorium
Judges and Court Staff – Facilitating Access While Maintaining Neutrality
What are the ethical dilemmas judges and court staff face when dealing with self-represented litigants? What protocols have been developed to guide them, and what do the case law and ethics advisory opinions say about the role of the judge? What materials have been developed to guide court staff?
Speakers: *Cynthia Gray*, Director, AJS Center for Judicial Ethics and author, *Reaching Out or Overreaching-Judicial Ethics and Pro Se Litigation*; *John Greacen*, Court Consultant and expert on court staff ethics.
- 9:45-10:00 am** **Break** G.T. Atrium
- 10:00-11:15 am** **PLENARY B** G.T. Auditorium
The Role of Attorneys in Pro Se Litigation
Speakers discuss a variety of ways attorneys can profitably engage in pro se assistance, including offering limited legal assistance (unbundling) and billing for paralegal assistance on some tasks. Speakers also discuss the role of pro bono assistance and volunteer attorneys presenting workshops and clinics for the self-represented. The role of state and local bar associations and state supreme courts in providing leadership and developing and promulgating rules governing attorney involvement in pro se litigation will be addressed.
Speakers: *Will Hornsby*, Staff Counsel, ABA Standing Committee on Delivery of Legal Services and author, "An Analysis of Rules that Enable Lawyers to Serve Pro Se Litigants," an April 2005 White Paper published by the ABA; *Bonnie Hough*, Supervising Attorney, California AOC Center for Children, Families and the Courts; *Shirley Williams*, Director, Mississippi Volunteer Lawyers Program.

11:30-12:45 pm Lunch E.S. Dining Room
Participants seated in peer groups.

1:00-2:15 pm Breakout Sessionssee below

I. Using Technology to Assist Self-Represented Litigants Room 314

A number of jurisdictions have found it useful to establish hotlines and websites with varying levels of sophistication. Speakers examine how these projects are funded and operated. **Speakers:** Joyce Raby, Program Analyst III, Legal Services Corporation; Neish Carroll, Staff Attorney, Texas Legal Services Center; Michael L. Monahan, Director, Pro Bono Project, State Bar of Georgia; Vincent Morris, Associate Director, Technology and Justice Projects, Arkansas Legal Services; Cheryl Nolan, Directing Attorney, Legal Aid Foundation of Los Angeles

II. Basic Steps in Planning Self-Help Assistance Activities Room 316

Speakers discuss how to develop a strategy to assist self-represented litigants. Factors to be considered include centralized v. decentralized court administration, local v. statewide funding, urban, high-volume caseloads v. rural or low-volume caseloads, high v. low stakeholder interest (including the bench and the bar), and other variables. Once the fiscal, organizational and political questions are addressed, and a decision is made to offer services to self-represented litigants, speakers will discuss how they have overcome or gone around barriers, built partnerships and started their programs.

Speakers: John Greacen, Court Consultant; Hon. Stephen George, Chief Judge, Family Division, Jefferson County Circuit Court (Louisville), KY; Granvette Matthews, Director, Family Division, Superior Court of Fulton County (Atlanta), GA, Family Law Information Center; John J. Specia, Jr., former Administrative Judge for the District Courts of Bexar County (San Antonio), TX; Hon. Neil Thomas, III, Hamilton County (Chattanooga), TN, Circuit Court

III. "Unbundling" Legal Services - What It Is and Is Not

Room 317

and How It Improves Revenue and Access to Justice

The speaker will explain what unbundling is and is not, why it is important to courts, and how it can improve attorney revenues. The speaker also will address malpractice and insurance coverage issues and other common concerns, including whether judges will permit limited assistance. Resource materials include a complete set of risk management materials and a roadmap for creating a successful unbundling program.

Speaker: M. Sue Talia, Attorney at Law, Private Family Law Judge, Danville, CA

Making the Courthouse Environment and Forms Room 517
User-Friendly for All Litigants, including the Self-Represented

When members of the public enter the courthouse, what aids can help them find their way around? Are forms and instructions written at a 6th grade level? Do court staff and judges speak plain English? What has to happen to implement statewide mandated forms? How are elderly, deaf and hard-of-hearing and blind persons, and people with physical disabilities accommodated? Speakers share what they have done in their jurisdictions to help court users navigate the system.

Speakers: Richard Zorza, Zorza Associates, author of monograph on designing a user-friendly court; Michael Dennard, former Idaho trial court judge; Hon. Norman Davis, Presiding Judge, Maricopa County, AZ, Family Court; J. Warren Keller, Chair, Kentucky Access to Justice Foundation.

2:15-2:30 pm Break G.T. Atrium

2:30-3:00 pm **Plenary C** G.T. Auditorium
Strategic Planning Tips for State Teams
Speaker: Richard Zorza, Zorza Associates

3:00-5:00 p.m. **State Delegation Meetings**see below
State delegations meet in assigned spaces.
Faculty will be available to offer advice if requested.

Alabama, Room 6003, 6th Floor

Arkansas, Room 517

Georgia, Room 317

Kentucky, G.T. Auditorium

Louisiana, Room 314

Mississippi, Room 6005, 6th Floor

Oklahoma, G.T. Auditorium

Tennessee, E.S. Dining Room, 6th Floor

Texas, Room 316

5:00 p.m. **Dinner on your own**
See *Downtown Dining* guide in front pocket of notebook.



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Saturday, February 3, 2007

South Texas College of Law

- 7:00 am** **Check out of the hotel** and store luggage with bell stand.
- 7:30 am** **If you wish**, meet in the lobby of hotel to walk together to South Texas College of Law, 1303 San Jacinto.
- 7:45-8:30 am** **Buffet Breakfast**..... E.S. Dining Room
- 8:30-10:00 am** **Program Showcase**G.T. Atrium
Faculty and presenters will provide more information and answer questions about their programs. See Tab 9 for Program Profiles on each presenter.
- A. **Utah Strategic Planning Process** - John Greacen
 - B. **Ethics Rules** that provide safe harbor to attorneys who assist the self-represented - Will Hornsby
 - C. **Three-County Regional Collaboration Model**, including teleconferenced one-on-one assistance by legal staff and teleconferenced workshops on forms completion - Bonnie Hough
 - D. **Legal Services Corporation's Technology Initiative Grant Program** - Joyce Raby
 - E. **Idaho's Interactive Court Forms Project** - Michael Dennard
 - F. **Maricopa County Family Court User-Friendly Project** and re-engineering resources to provide services without additional costs - Judge Norman Davis
 - G. **Mississippi Volunteer Lawyers Project** - Shirley Williams
 - H. **Arkansas Legal Services Website** - Vince Morris
 - I. **Georgia Website, Pro Se Assistance to Rural Litigants and Mobile Center** - Michael Monahan
 - J. **Fulton County, Georgia; Family Law Information Center** - Granvette Matthews
 - K. **Texas Legal Services Center Website** - Neish Carroll
 - L. **Bexar County (San Antonio) Court-Based Pro Se Services** - John J. Specia, Jr.
 - M. **Jefferson County, Kentucky; Court-Based Pro Se Services** - Judge Stephen George

10:00-10:15 am Break G.T. Atrium

10:15-11:30 am State Delegation Meetings same rooms as Friday

Alabama, Room 6003, 6th Floor
Arkansas, Room 517
Georgia, Room 317
Kentucky, G.T. Auditorium
Louisiana, Room 314
Mississippi, Room 6005, 6th Floor
Oklahoma, G.T. Auditorium
Tennessee, E.S. Dining Room, 6th Floor
Texas, Room 316

11:45am Lunch Pick up box lunch in Atrium

12:00-1:00 pm State Delegation Reports G.T. Auditorium
Moderator: *Richard Zorza*
A representative of each state briefly summarizes conclusions reached or plans made during the team meetings.

1:00 pm Adjourn