Prepared for:
The Minnesota Justice for All Project

Minnesota's LawHelpMN Guide:
TRUSTED INTERMEDIARIES AS USERS AND FACILITATORS

Prepared by:

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In addition to reporting on the project, this publication is meant to serve as a resource.

It also provides information about what worked and didn't work for those who might be considering a similar project.

We hope you find it interesting and useful.

The Project Team
March 2019

CATALYSTZONE

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TRUSTED INTERMEDIARIES AS USERS & FACILITATORS

EXECUTIVE SUMMARY

In mid-February, Minnesota Legal Services State Support (State Support) launched an easy-to-use portal called the **LawHelpMN Guide** (Guide). Designed to deliver a customized set of self-help resources and referrals that address an individual's specific legal concern or problem, the Guide generates curated results in response to an individual's answers to a series of simple questions. These "guided" questions are intended to narrow a person's legal topic and, if needed, assess their potential eligibility for services based on a variety of factors including location and income.

In developing the Guide for the redesigned www.LawHelpMN.org public portal, the Minnesota Supreme Court and state Access to Justice leaders recognized they would need to create community gateways to legal information and services--through local domestic violence and homeless shelters, schools, churches, public libraries, healthcare and social service providers, etc. These are the local institutions to which people are already turning in their communities when they need information or help. It is hoped these "**trusted intermediaries**" will facilitate use of LawHelpMN and the Guide.

"*Many people, especially those who have low incomes or who are vulnerable, do not receive help with their legal problems or do not find their way to the legal service provider they need without intervention from a **trusted intermediary** in a community organization.*"

Trusted Help Report
The Law Foundation of Ontario

Project Overview

From September through December 2018, the project team engaged members of three "trusted intermediary" groups of stakeholders in a human-centered design research process:

❖ Public librarians
❖ Social service providers
❖ Faith-based service providers/ministries

We received input from our participants in a variety of ways, from *pre-session online surveys* to in-person, real-time *interviews and observations* as participants were using the MNLawHelp Guide to *exit interviews* and *facilitated group discussion*. The primary areas of inquiry were:

▪ How could the Guide be used in each stakeholder groups community work?
▪ How could stakeholders most effectively use the Guide in their community work?
▪ What gaps did stakeholders see in the Guide that, if filled, would make it more useful for them and/or the community?
▪ How might the Guide be adopted most broadly across each stakeholder sector?

The group feedback sessions for librarians and social service workers were conducted in two locations, one rural and one urban. The Minneapolis/St. Paul area served as the urban location and Beltrami County was chosen for the rural location. Members of faith-based programs and ministries were interviewed individually in locations of their choosing. A total of 28 stakeholders participated:

• 14 social service providers (13 rural and 1 urban)
• 5 librarians (4 urban and 1 rural)
• 9 faith-based service providers (central/south Minnesota).

The project also engaged almost two dozen student volunteers from the University of Minnesota and Bemidji State University (BSU) to serve as observer-interviewers. All volunteers were trained on their specific roles and on the basics of design-thinking and human-centered legal design, were provided librarian and social worker user personas and reviewed all the instruments used in the course of the project.

Top-Level Takeaways

Here we summarize the "big picture" learnings while more specific, individual responses appear in the full report.

Before the participants were introduced to the Guide, we wanted to begin with a better understanding of whether or not our participants were already using the internet in their work with community members. We also wanted to know whether participants were being asked about or were seeing problems they perceived to have a legal component of some kind.

In an online survey, we asked if the internet was ever a source of help or information for them in their work with clients or community members. *62% of the total participants said the internet was "always" or "usually" a source of help or information.*

In the same survey, we asked how often they were seeing clients or community members they (the intermediaries) thought might have a problem with a legal aspect to it--even though the client/community member did not identify the problem as a legal one. *70% of the participants were seeing clients or community members with legal problems at least once a week.*

After the participants used the Guide:

- **All but one participant responded that they would definitely or very likely use the LawHelpMN site and the LawHelpMN Guide.** The one who said she "might use" the LawHelpMN site and guide worked closely with the offender community and had already developed a set of self-help and other resources specifically for her clients.

- **All the participants found the site easy to use themselves** with the exception of one elderly participant who was not comfortable with computers. However, he was still quite enthusiastic about the site's availability.

- **All felt that the site would be relatively easy to use for their clients and community members** if the user was literate.

Suggestions for tools like an audio reader[1] or chat function[2] were made while several felt they would make no changes at all. A number of the participants looked forward to the time it would be made **available in multiple languages**.

Facilitated group discussions underscored some of the comments made during the individual exit interviews, about **when and how to ask income eligibility questions**, wording that differentiates sexual assault from domestic violence and the often-repeated desire to see the site provide links or referrals to non-legal information and assistance.

During the discussion groups, participants encouraged us to make sure intermediary groups were made aware that the tool existed, how it can help and how it works. Questions to those assembled about **how best to create awareness** about the LawHelpMN site and **increase usage** of the LawHelpMN Guide among their peers produced valuable suggestions about who we needed to reach, what communication tools to use and the most meaningful messages we could convey.

All the participants were <u>very</u> excited about the existence of LawHelp MN and the Guide as a tool for community members and organizations to discover information and assistance pertinent to their specific problem. All said they would not only use it in their work and **would also recommend it to their co-workers and colleagues.**

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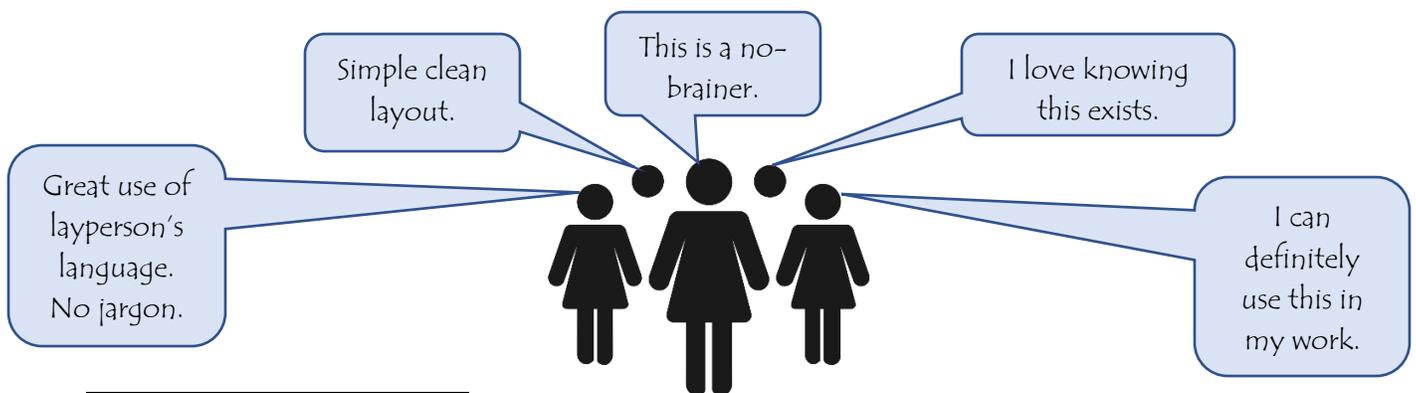
[1] There are programs and networks who provide audio reading services "for people who have difficulty reading standard print due to vision loss, physical or learning disability, mobility challenges, and age." https://reader.ku.edu (accessed March 23, 2019) as well as text-to-speech applications http://dyslexiahelp.umich.edu/tools/software-assistive-technology/text-to-speech-readers (accessed March 23, 2019)

[2] Chatbots "are computer programs designed to mimic human conversation. They create an artificially-generated response based on the input from a person, using dialogue-based text." https://www.americanbar.org/groups/gpsolo/publications/gpsolo_ereport/2018/december-2018/chatbots-justice-is-that-thing/) (accessed March 23, 2019)

<p style="text-align:center">LawHelpMN Guide Report:</p>

TRUSTED INTERMEDIARIES AS USERS AND FACILITATORS

Center on Court Access to Justice for All
...promoting access-friendly courts

a project of
NCSC
National Center for State Courts

HOME   TOPICS   ASSISTANCE   CURRICULUM   WEBINARS   JUSTICE FOR ALL

CENTER ON COURT ACCESS TO JUSTICE FOR ALL > JUSTICE FOR ALL PROJECT

Justice for All Project

Minnesota's Justice for All Funding

In early 2016, the National Center for State Courts announced the Justice for All (JFA) project, which aimed to support efforts by the states to include all relevant stakeholders in the civil justice community in a partnership to better understand, adopt, and move toward implementation of Conference of Chief Justices/Conference of State Court Administrators Resolution 5 (Meaningful Access to Justice for All)[3]. The project also sought to enhance states' commitment to reimagining how to work across organizational boundaries and optimize all available resources to advance access to justice for all.

In November 2016, the National Center for State Courts (NCSC), announced the recipients of their Justice for All (JFA) project grants[4]. Minnesota was one of only seven states to win a strategic planning grant. The original JFA states completed and reported on their state plans[5] and a "lessons learned" report was then published[6].

The following year, Minnesota secured a Technology Initiative Grant from the Legal Services Corporation and Minnesota Court Technology Grant funds for technology infrastructure of its online legal triage and channeling portal (the Guide).   Minnesota also received additional Justice for All funding for implementation of their plan. The JFA implementation supported the redesigned LawHelpMN portal in three ways, developing:

1. Unbundled/Limited Scope Legal Representation
2. Alternative Dispute Resolution Resources
3. **Outreach and User Design for Non-Traditional Stakeholders**

JFA implementation funds were used to underwrite the LawHelpMN Guide's **Trusted Intermediaries** project with the intention of addressing item 3 above.

Project Support

The Justice for All project is generously supported by the Public Welfare Foundation and The Kresge Foundation.

Public Welfare Foundation

THE KRESGE FOUNDATION

OPEN SOCIETY FOUNDATIONS

Project Partners

SRLN

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[3]CCJ/COSCA RESOLUTION 5: Reaffirming the Commitment to Meaningful Access to Justice for All
https://www.ncsc.org/~/media/Microsites/Files/access/5%20Meaningful%20Access%20to%20Justice%20for%20All_final.ashx (accessed March 23, 2019)
[4] https://www.ncsc.org/~/media/Microsites/Files/access/JFAImplementationAnnouncementFinal71118.ashx
[5] https://www.ncsc.org/~/media/Microsites/Files/access/JFA%20State%20Plans%20Combined.ashx
[6] https://www.ncsc.org/~/media/Microsites/Files/access/JFALessonsLearnedFinal2018.ashx

How the LawHelpMN Guide Works

LawHelpMN.org has long focused on providing reliable self-help information and legal services referrals for common civil legal issues facing low-income Minnesotans. The redesigned LawHelpMN.org includes a new navigation tool called the **LawHelpMN Guide**. The Guide is designed to deliver a customized set of self-help resources and referrals that address an individual's specific legal concern or problem. These curated results are generated in response to an individual's answers to a series of simple questions intended to:

> 1) narrow their legal topic, and
>
> 2) assess their potential eligibility for services based on a variety of factors including location and income.

The Guide firsts asks users questions about the type of legal problem they are having, and then offers self-help resources based on those answers. If the user wants to find legal help, they proceed to a second stage of questions where more personal information is gathered, including income, household size, county of residence and eligibility factors. These are necessary to determine qualification for free or low-cost legal services, the primary referrals offered by the site.

The LawHelpMN Guide is intended to improve the ability of Minnesotans to connect with the legal services most relevant to their particular situation, and for which they are most likely to be eligible, along a "continuum of meaningful and appropriate services." Offering referrals along that continuum includes referrals that are tailored to the individual's circumstances across a broad range of services, such as legal aid organizations, legal clinics, law libraries, self-help centers, alternative dispute resolution services, and private attorney referral programs.

Offering referrals along this continuum also means recognizing the needs and challenges of low- and moderate-income people who aren't financially eligible for traditional legal aid services, as well as those who may want to try to resolve their problem outside the court system. It is a particularly advantageous time to be developing the LawHelpMN Guide because of important recent developments in Minnesota intended to help close those gaps.

Those developments include the following projects:

The Low Fee Family Law Project[7] a joint initiative of the Minnesota State Bar Association (MSBA) and the Hennepin County Lawyer Referral and Information Service (LRIS), provides legal assistance at reduced rates for low-income individuals with family law issues. It matches those who do not meet legal aid guidelines and who are likewise not eligible for pro bono legal services with attorneys who are interested in serving modest-means family law clients at a reduced rate.

The Minnesota Unbundled Law Project[8] connects individuals looking for low-cost legal options with private attorneys offering limited scope or "unbundled" legal services, an arrangement that allows an attorney and a client to customize legal services according to the client's needs and budget.
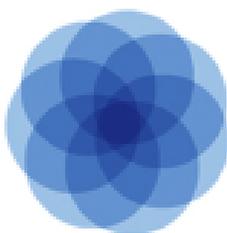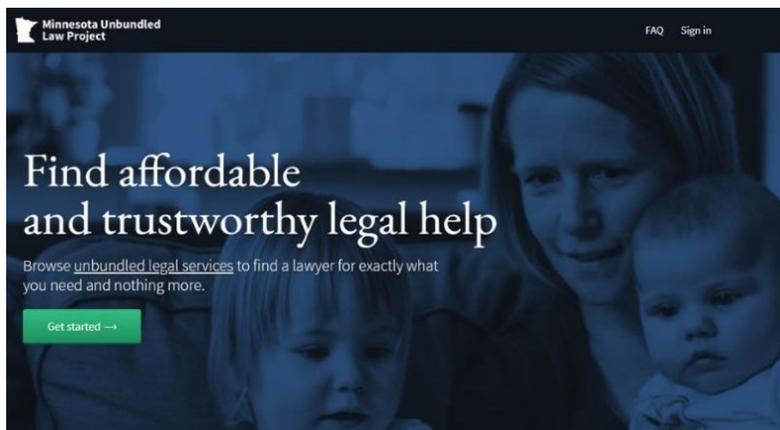
Community Mediation Minnesota (CMM)[9] is a statewide network of certified nonprofit service providers with skilled mediators ready to help Minnesotans resolve conflicts.

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[7] http://www.mnlegalservices.org/legal-services-in-the-news/2018/4/13/statewide-low-fee-family-law-project-now-accepting-referrals (accessed March 23, 2019)

[8] https://mnunbundled.org (accessed March 23, 2019)

[9] https://communitymediationmn.org/ (accessed March 23, 2019)

THIRD PLACES AND TRUSTED INTERMEDIARIES:

Taking justice to *where people already are* takes us to the places community members already go for help and to the people and institutions they trust. Recognition of the concept of "third places" and the use of "trusted intermediaries" as community connectors to legal information and assistance is critical to bridging the justice gap.[10]

THIRD PLACES

"Third place" is a term coined by sociologist Ray Oldenburg[11] and refers to places where people spend time between home ('first' place) and work ('second' place). As Oldenburg notes, "the most effective ones for building real community seem to be physical places where people can easily and routinely connect with each other: churches, parks, recreation centers, hairdressers, gyms and even fast-food restaurants."

Third places have important community-building attributes. Depending on their location, social classes and backgrounds can be "leveled-out" in ways that leave people feeling they are being treated as social equals. Informal conversation is the main activity and most important linking function. One commentator refers to third places as the "living room" of society.[12]

TRUSTED INTERMEDIARIES

> *"Many people, especially those who have low incomes or who are vulnerable, do not receive help with their legal problems or do not find their way to the legal service providers they need without intervention from a trusted intermediary in a community organization*." – Trusted Help report[13]

Discussions about access to justice typically focus attention on access through the traditional routes of courts, lawyers, law schools and pro bono or legal aid service providers. In this context,

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[10] Sandefur, Rebecca L, Executive Summary, Accessing Justice in the Contemporary USA: Findings from the Community Needs and Services Study (American Bar Foundation University of Illinois At Urbana-Champaign, 2014), http://www.americanbarfoundation.org/uploads/cms/documents/sandefur_accessing_justice_in_the_contemporary_usa._aug._2014.pdf (accessed March 23, 2019) The Study found widespread incidence of events and situations that had civil legal aspects, raised civil legal issues, and were potentially actionable under civil law. Two-thirds of individuals surveyed reported experiencing one or more such situations in the 18 months prior to the survey. Astoundingly, the Community Needs and Services Study also found that only about a fifth (22%) of those with a civil legal problem sought any kind of assistance at all. According to the study's author, **"[a] more important reason that people do not seek assistance with these situations, in particular assistance from lawyers or courts, is that they do not understand these situations to be legal. In other words, people know they have problems but haven't a clue that a legal remedy might be available**. See also Legal Services Corporation, The Justice Gap: Measuring the Unmet Civil Legal Needs of Low-income Americans Executive summary (2017), https://www.lsc.gov/sites/default/files/images/TheJusticeGap-ExecutiveSummary.pdf (accessed March 23, 2019)

[11] Ray Oldenburg is an urban sociologist who writes about the importance of informal public gathering places. In his book The Great Good Place (1991), Oldenburg demonstrates how and why these places are essential to community and public life, arguing that they are central to local democracy and community vitality.

[12] https://www.brookings.edu/blog/up-front/2016/09/14/third-places-as-community-builders (accessed March 23, 2019)

[13] Trusted Help: The Role of Community Workers as Trusted Intermediaries Who Help People with Legal Problems. http://www.lawfoundation.on.ca/what-we-do/publications-research-and-evaluations/trusted-intermediaries-research (accessed March 23, 2019)

solutions tend to emphasize more effective use of online technologies or simplification of processes to bridge the gap between those who need legal services and the services they require.[14]

Trusted community members, often serve as a natural first point of contact when a legal issue arises for those who don't typically have direct access to a lawyer. In some cases, community-based intermediaries can function effectively to provide assistance that can reduce or eliminate escalation of a legal problem to the point where traditional legal dispute resolution mechanisms are not even required.

Research shows that legal problems are often mixed with a range of related social and other issues, and people facing a cluster of issues may not even recognize that their problem is legal in nature. Key intermediaries can help people recognize a legal component, gain a basic understanding of the problem and possible next steps, as well as get a helpful referral to legal and social services. As a result of this early support, people may be better equipped to take some initial steps — such as talking with their landlord or neighbor — that can prevent a problem from escalating.

> *"I work with women returning home from prison, women who are in and out of jail, with dreams to be law-abiding citizens…we use the trauma-informed approach to heal our community. I also create programming so (the women) feel comfortable bringing their families to gatherings…to make them feel welcomed."*
>
> Participant

The use of intermediaries as an effective means to enhance access to justice was confirmed in the August 2013 Community Legal Education Ontario (CLEO) report, Public Legal Education and Information in Ontario Communities: Formats and Delivery Channels.[15] CLEO researchers found that:

> *"Low-income and socially isolated people are most likely to seek out or rely on in-person support from a trusted intermediary, such as community workers, when seeking information and assistance. In Canada, this is particularly true for people who speak non-official languages, Aboriginal peoples, people with low literacy skills, people with disabilities, and others who are low-income and disadvantaged. Moreover, because of cognitive changes that appear to take place when under stress, some research suggests "[o]ne-on-one, individualized information sessions may be the most appropriate way" to initially address legal issues with people in crisis."*

In 2016, the Law Foundation of Ontario selected a team to conduct research to help them better understand trusted intermediaries and the ways in which they could be supported to help advance access to justice for their clients.[16] They learned:

- o Well-trained intermediaries are key to providing broad-based access to justice, serving as a point of first contact to provide basic information, appropriate referrals and to

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[14] Bridging the Gap: Access to Justice Through Legal Intermediaries http://www.slaw.ca/2013/10/23/bridging-the-gap-access-to-justice-through-legal-intermediaries (accessed March 23, 2019)

[15]   http://www.plelearningexchange.ca/wp-content/uploads/2014/02/CLEO-Report-PLEI-Formats-and-Delivery-Channels-in-Ontario.pdf (access March 23, 2019)

[16]   http://www.lawfoundation.on.ca/what-we-do/publications-research-and-evaluations/trusted-intermediaries-research (accessed March 23, 2019)

ensure efficient use of more specialized legal resources by potentially reducing the demands upon those resources.
- o Trusted intermediaries play an important role in helping people access justice and/or legal support.
- o Intermediaries' relationships with community members are grounded in mutual trust, offer much needed support, and "provide vital service with inspiring commitment". They are eager to participate in training and receive supports so they can, in turn, help those who turn to them.
- o Trusted intermediaries provide people with legal information, make referrals to legal services, help clients fill out forms, and accompany people to meeting with legal service providers. Community workers can't give legal advice, but they can and do help people better understand the law and navigate the legal system.
- o Legal clinics and other legal practitioners have formed productive partnerships with trusted intermediaries and support their work in a variety of ways. Nonetheless, trusted intermediaries often have trouble finding legal professionals to help them and their clients.
- o More can be done to link community organizations and trusted intermediaries to legal service providers. Connections, partnerships, and collaboration are key to advancing access to justice.

Public Librarians

An important example of a "third place" is the public library.

Public libraries exist in urban, suburban, and rural areas, and typically have a long history in their community.

A Pew Research Center telephone survey of 1,601 Americans ages 16 and older conducted from March 7 to April 4, 2016, finds a growing sense that libraries can help people decide what information they can trust: 37% of Americans feel that public libraries contribute "a lot" in this regard, a 13-point increase from a survey conducted at a similar point in 2015.

There are a range of findings in the Pew survey of potential interest, demonstrating the value of libraries as trusted community hubs and community partners, including the idea that libraries serve communities at times of crisis is now well established. Some 55% of those ages 16 and older say libraries contribute a lot or somewhat when a natural disaster or major problem strikes the community.

> "*Most are looking for support with finding a job, maybe resume or job postings as well as printing some job applications for them…and some financial support such as gas vouchers or bus tokens, depending upon which is available. (It's my job) to be of assistance with an open mind and without judgment.*"
>
> Participant

Libraries also serve as a day-refuge. "Libraries are coping with a large number of patrons who are homeless or have mental illness."[17] This is not an exclusively an urban issue. Noted one mayoral candidate in Bemidji in October of last year, "(I've) met with other community leaders to continue working on the homelessness problem, as it has had an impact on the Bemidji Public

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[17] The Librarians Guide to Homelessness, June 2018 https://americanlibrariesmagazine.org/2018/06/01/librarians-guide-homelessness The American Library Association offers ideas and resources to its members called Extending Our Reach: Reducing Homelessness Through Library Engagement http://www.ala.org/aboutala/offices/extending-our-reach-reducing-homelessness-through-library-engagement-6

Library. I recognize our library has a lot of pressure on it, because people need a warm place, which the library is, and it has Wi-Fi." [18]

One reason public libraries are such important "third place" institutions is that they have gradually taken on other functions well beyond lending out books. In many communities, librarians are also ad hoc social workers and navigators. They help local people figure out the complexities of life, from navigating the health system to helping those with housing needs. This "go-to" role has influenced library programming and events, with libraries providing connections to health, housing, literacy, and other areas.

Community Service Providers

By Community Service Providers (CSPs) we mean nonprofit organizations whose mission does not include providing legal advice, but whose clients likely have legal issues in addition to the issues that brought them in. Some are large, structured, and supported by multiple funding streams--like nonprofit hospitals. Others are small, with few staff or are staffed by volunteers only, and have relatively little funding and infrastructure.

Community service providers may:

- operate in a specific sector, such as health, education or faith-based,
- serve a specific population, culture or ethnicity (like domestic violence victims or veterans or Somalis or Native Americans),
- resolve specific issues like homelessness, addictions, economic development, and/or
- provide wrap-around services (one stop shop, continuum of care).

Regardless of the type of service provided, people who visit community service providers often have legal issues whether they know it or not. Key factors in the value of community service providers include the client's[19] comfort and trust, a holistic approach to helping clients resolve

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[18] https://www.bemidjipioneer.com/news/government-and-politics/4521897-how-best-help-homeless-mayoral-candidates-albrecht-vene-take

[19] As in the Law Foundation of Ontario's Trusted Help report, "*we refer to the people receiving help from community organizations as "clients." We recognize that this term is not a ft for all community organizations or sectors. It suggests a formal relationship between a service provider and the recipient of the service that is not often found in community organizations. Some sectors use other terms, like "patient" in community health organizations, "learner" in literacy organizations, or "user" when relating to the provision of online services.* http://www.lawfoundation.on.ca/wp-content/uploads/LFO_TrustedHelpReport_Part2_EN.pdf TRUSTED HELP: Part 2: Detailed research findings | February 2018 9 against women organizations. In this report, we use "clients" in a broad sense to mean anyone who gets help from nonlegal community organization staff.

multiple aspects of their problems, and the opportunity for early intervention to prevent a legal problem from escalating.

A Minnesota Example of Legal and Community Service Provider Integration

Opening in 2009, **Northern Dental Access Center in Bemidji** serves low-income patients. A full-time attorney from Legal Services of Northern Minnesota is available to dental patients and the general community.

Northern Dental Access Center Medical-Legal Partnership

Summary

- **Need:** *To help low-income patients in rural Minnesota overcome legal barriers to oral healthcare and self-sufficiency.*

- **Intervention:** *The medical-legal partnership of Northern Dental Access Center and Legal Services of Northwest Minnesota provides free consultations and support services.*

- **Results:** *The innovative and collaborative approach has been recognized regionally and nationally, and over 9,000 new patients have been screened for legal issues.*

This Medical-Legal Partnership (MLP) helps low-income patients overcome legal barriers that prevent them from achieving optimal oral health. Patients checking in for a dental appointment are given a self-screening document to identify any legal issues that may be interfering with health or self-sufficiency.

Patients and community members can receive:

- Answers to basic legal questions
- Guidance in addressing legal barriers
- Full legal representation
- In-house referrals to other support services that can help low-income people overcome other barriers

Over 9,000 new patients have been screened for legal issues, 30% of whom (69% female, 31% male) report having a legal issue:

Faith-Based Service Providers

In 2010, more than half of Minnesota's population were considered adherents to the state's almost 6000 religious' groups- - from the African Methodist Episcopal Church to the Zoroastrian.[20]

Using a national survey of religious congregations in the U.S., the Duke Divinity School professor Mark Chaves found that 83 percent of congregations have some sort of program to help

> *"I text them to see how they are doing, invite them over to spend time together, worship with them, give them rides, provide childcare, provide meals."*
>
> Participant

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[20] http://www.thearda.com/rcms2010/r/s/27/rcms2010_27_state_name_2010.asp Congregational adherents include all full members, their children, and others who regularly attend services. The 2010 reports contain incomplete counts of congregations and adherents belonging to the eight largest historically African-American denominations. These denominations are not included in the 2000 reports and are largely missing from the 1990 and 1980 reports. (accessed March 23, 2019)

needy people in their communities. Most often, these efforts provide clothing, food, and temporary shelter, rather than intensive, long-term programs on substance abuse, post-prison rehabilitation, or immigrant resettlement.[21]

have argued that involvement in religious groups is associated with a variety of positive outcomes for youth—including better mental and physical health, lower levels of substance abuse, and high educational attainment—in part because religious groups provide strong social connections and a sense of identity. Plus, faith communities provide significant assistance for struggling families, from rental and food assistance to after-school care and mentoring of both kids and single parents.[22]

There has not been a comprehensive study regarding how many faith-based organizations are engaged in helping the poor, how they are doing so or how much time and money they are investing in their efforts. It is clear, however, that if these efforts were to end, low-income communities would suffer.

> *"We help with basic human needs: food, clothing, homelessness and financial assistance for rent, eviction, medication, emergencies and utilities. We provide assistance or advocacy for people when they are dealing with societal systems: housing, public assistance, courts and incarceration, reentry after release, parole officers and police."*
>
> *Participant*

"Sociologists, like Robert Putnam and Ram Cnann, have shown that religious participation is in its steepest decline among lower classes. Church attendance is correlated strongly to higher levels of education and income. Working class and poorer families are less likely to participate in a religious community than any other socioeconomic group. Religious faith and practice is a reflection of human beliefs, but it is also a marker of economic realities, including the gap between affluent and distressed neighborhoods.

Putnam has argued that involvement in religious groups is associated with a variety of positive outcomes for youth—including better mental and physical health, lower levels of substance abuse, and high educational attainment—in part because religious groups provide strong social connections and a sense of identity. Plus, faith communities provide significant assistance for struggling families, from rental and food assistance to after-school care and mentoring of both kids and single parents."

Low-Income Communities Are Struggling to Support Churches https://www.theatlantic.com/politics/archive/2018/01/low-income-communities-churches/549677/

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[21] Can Religious Charities Take the Place of the Welfare State? Emma Green Mar 26, 2017 https://www.theatlantic.com/politics/archive/2017/03/budget-religion/520605
[22] https://www.washingtonpost.com/news/acts-of-faith/wp/2015/03/26/why-so-many-empty-church-pews-heres-what-money-sex-divorce-and-tv-are-doing-to-american-religion/?utm_term=.1a5bb71d0b57

Methodology for Trusted Intermediary Feedback Sessions

This project was undertaken during the pre-launch user testing period with an early iteration of the LawHelpMN Guide.

Traditional user testing by individuals facing legal needs, especially low-income individuals, was already part of Legal Services State Support's work plan for the portal. CatalystZone was hired to take a design research approach to assist in developing a better understanding of how the portal could be used by three trusted intermediary stakeholder groups: social and faith-based service providers and public libraries. Their feedback would be used to enhance the user-centeredness of the portal's design.

The trusted intermediary participants used a development version of the Guide. Because the site development was still in progress, the full range of self-help resources and referrals that now exist had not yet been added.

For the trusted intermediary group feedback sessions, it had already been determined that the sessions would be held in one urban and one rural site. The Twin Cities area was the natural site for the urban pilot.

For the rural pilot, the project team looked at a number of factors in order to develop multiple profiles for a rural site, such as poverty level, the presence of special or vulnerable populations and a critical baseline of community service infrastructure, including but not limited to a community college; branch library; United Way, community foundation or some other umbrella funder or nonprofit resource; a faith alliance or council of churches. Ultimately Beltrami County was chosen. Located in northwestern Minnesota, little more than 100 miles from the Canadian border, Bemidji is its county seat.

Beltrami is Minnesota's 4th largest county in land area, with a population of 44,000+ and the state's highest poverty level (more than 18%).

Two of Minnesota's three Indian reservations, Leech Lake and Red Lake, are located partially within Beltrami County with the third (White Earth) nearby. Beltrami's population is 78% percent white and 12% American Indian.

- *The urban pilot* was held in mid-September with 5 participants--4 from libraries and 1 from a nonprofit.

- *The rural pilot* was held in October over the course of two days in two separate Bemidji locations and engaged 14 participants--including 13 social service providers and the Bemidji Public Library branch manager.

- *Faith-based community service providers* were engaged via individual in-person interviews and feedback sessions through the month of November and into early December 2018. 9 faith-based participants included members of the Lutheran, Baptist, Presbyterian denominations as well as the Muslim faith and members of a Nondenominational church.

The User:

Trusted Intermediary – serving as User, Guide, Facilitator

"Intermediaries are trusted community members, often working in social services or holding leadership positions within their communities. They serve as a natural point of first contact when a legal issue arises, for those who don't typically have direct access to a lawyer."[23]

The Product:

LawHelpMN site and LawHelpMN Guide

The existing LawHelpMN.org free legal information site has been redesigned with the adoption of a completely new platform (Drupal). The redesign goals included better user experience, narrowed and tailored resource and referral results and the addition of an online triage system known as the LawHelpMN Guide.

The Process:

Iterative Design

Iterative design is a design methodology based on a cyclic process of prototyping, testing, analyzing, and refining a product or process. Based on the results of testing the most recent iteration of a design, changes and refinements are made. This process is intended to ultimately improve the quality and functionality of a design. In iterative design, interaction with the designed system is used as a form of research for informing and evolving a project, as successive versions, or iterations of a design are implemented.[24]

Design Research

Design research and research methods differ from social science research or marketing research in that it focuses on people's experiences. In design research "we're trying to understand people's deeper motivations, their deeper needs…where they're comfortable, what they understand, from their perspective"[25] The creation of a librarian and a social worker user persona for training volunteer observers and interviewers along with the non-random selection of a small cohort of trusted intermediaries was designed to solicit a qualitative response more than a quantitative one[26].

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[23] Bridging the Gap: Access to Justice Through Legal Intermediaries by Karen Dyck
http://www.slaw.ca/2013/10/23/bridging-the-gap-access-to-justice-through-legal-intermediaries/
[24] https://en.wikipedia.org/wiki/Iterative_design (accessed March 23, 2019)
[25] Margaret Hagan, Understanding the Status Quo Using Design Research Methods (transcript), Suffolk Law Legal Innovation and Technology Online Certificate Program, February 2019
[26] *Ibid*. "Another distinction is that between research that focuses on attitudes versus that which focuses on behavior…we try to do both when we're doing design research, because when you talk to people in surveys and interviews and focus groups, you usually get their attitudes, what they say they like, what they say they would want to do in the future, which is very useful. But we all kind know what people say and what they actually do are often very different in practice. So, we try to balance out that more attitude focused research with behavioral research where we observe people and see what they actually do."

While the information contained in the report should not be considered definitive of any group perspective, it does help us begin to:

- develop a better understanding of the role and importance of trusted intermediaries in communities,
- consider additional methods for outreach, education or partnership, and
- ask better questions during the design, development and continuous improvement processes for current and future products, services and systems.

The Tools:

For Volunteers

> *A volunteer guide, scripts, in-person or video training and user personas* were provided to volunteers (see Appendix A)

For Participants

- *Online Survey* – a pre-session survey was developed to determine each participants usage of the internet in connection to their work and the likelihood they would encounter legal problems in their work with clients/community members.
- *In-Person One-on-One Observation* – staff and volunteers encouraged each participant to articulate their thinking process and took notes on verbal and nonverbal reactions as participants worked their way through the LawHelpMN Guide.
- *In-Person One-on-One Exit Interviews* – immediately after using the LawHelpMN Guide, participants were interviewed as to their impressions
- *In-Person Facilitated Group Discussion* – were conducted for the librarian and social service provider groups which met at central locations. Observer/interviewers traveled to individual faith-based participant's office or chosen location so group discussion was not possible.

INQUIRY:

Use:
How could the LawHelpMN Guide be used in stakeholder groups' community work?

In order to determine how participants were already using the internet, the project team asked in the pre-session online survey if the internet was ever a source of help or information for them in their work with clients or community members.

- **62% of the total participants said the internet was *always* or *usually* a source of help or information.**
  - For 3 out of the 4 librarians this was the case.
  - 9 of the 10 social service providers who answered this question *always* or *usually* used the internet.
  - Conversely, 4 out of 5 faith-based participants replied that they *rarely* or *sometimes* used the internet as a source of help or information in their work.

We also wanted to see how often they were seeing clients or community members they (the intermediaries) thought might have a legal aspect to it--even though the client/community member did not identify the problem as a legal one.

- **70% of the participants were seeing clients or community members with legal problems *at least once a week.***
  - 3 of the 4 librarians were seeing patrons with legal problems at least once a week.
  - 9 of the 10 social service providers were seeing legal problems at least weekly and of those, 5 responded that they saw them "almost every day".
  - 2 of the faith-based participants said once a week.

Finally, the project team wanted to know how often their clients or community members identified their needs as legal or law-related to the intermediaries.

  - 6 of the 11 social service providers said clients identified their own problems as legal "sometimes" while 4 replied "frequently"
  - All 5 of the faith-based participants responded that the community members identified their problems as legal "sometimes"

After the Session

Immediately after participants finished working their way through the LawHelpMN Guide, the volunteers began the exit interview to capture first impressions. When asked, "How likely is it that you would use this in your work,":

- **19 out of 20 participants responded that they would *definitely* or *very likely* use the LawHelpMN site and the LawHelpMN Guide.** The one respondent who said she "might"

use it worked with trafficking victims and said she had already developed resources and self-help materials for them.

When asked how they would use the site when working with clients or community members:

- **All the librarians said they would point their patrons to the site and help them get started.** They would also be available if the patron had questions once they were in the site, but otherwise it was not an appropriate role for them to do the research themselves or guide the patron step by step through the online tool. On the other hand, they might be willing to be more hands-on with the user once the user had reached the self-help section.
- **Of the social service providers,** 4 said they would search for their client <u>or</u> let them use it on their own; 3 said they would do the searches for their clients; and 3 said they would point community members to the site.
- **Faith-based participants responded** with 2 saying they would offer to do the search themselves; one would help the community member research and one would simply point them to the site. One of the respondents also suggested a group model where community members and faith-based volunteers could work together.   The 5th faith-based member, an elderly pastor not fully comfortable with a computer said he would prefer to spread the word among his peers.

Participants were asked how easy it was for them to use the site and how easy they thought it would be for clients and community members to use:

- **All the participants found the site easy to use themselves** with the exception of the elderly pastor mentioned above. However, he was still quite enthusiastic about the site's availability.
- **All felt that the site would be relatively easy to use for their clients and community members** *if the user was literate.* * One participant noted it was "easy to follow and not too wordy or complex", a comment that was echoed by other participants. (<u>Note</u>: an asterisk is used throughout the remainder of the report to indicate that multiple participants made the same or very similar comments.)

Effectiveness:

How could stakeholders use the LawHelpMN Guide most effectively in their community work?

<u>Note</u>: *Excitement about the existence of LawHelpMN and The Guide was universal. For that reason, Participants clearly tied effectiveness of the Guide's use to the need for intermediary outreach, education and ongoing engagement and relationship building--through feedback mechanisms, communication of updates, improvements, usage statistics, etc.*

During the discussion groups, participants encouraged us to make sure intermediary groups were made aware that the tool existed, how it can help and how it works. Volunteers asked for their

suggestions on how to introduce the tool to their peers. One of the suggestions was for us to segment our stakeholder target audiences by:

- location--i.e. rural versus urban
- group type--such as library, service provider, etc.
- emphasizing specific relevance to their work
- whether the intermediary will be using the tool, facilitating their clients use of the tool or simply pointing them in the right direction

Additional suggestions included:

- Whenever possible, use *your* community connections and ask them how best to go about it with their peers in their locales.
- Use influencers (professional associations, conference sessions, funders, recognized peer leaders, bosses).
- Have peer groups share tips about how they have used it or things they have discovered.
- Consider communication tools such as user groups, slack channels, e-tips, system updates for intermediaries.

<u>After the Session</u>

During the exit interview, participants were asked:

What did they like most? Being able to get done what is needed right then and there
- I liked pictures of the people that are reflective of the community
- The prompts with the questions helped guide my answers
- User-friendly. Clean. Simple. Engaging. Not cluttered. Easy to navigate. Not a lot of legal jargon*
- Convenient to have information organized in one place*
- Fact sheets*
- That it recognizes native people in one of the questions and that the issues and legal opportunities are different if you are on a reservation. Very grateful to see that this group of people is not ignored
- Seems to cover most of the issues that frequently come up with the people I serve

What did they like least?
- Needs to include more than just legal services. Bring in other referrals like counseling or non-legal resource links*
- Domestic violence (DV) screen pop-up* cames up so early in the process it could be off-putting or confusing if DV may not be issue client is coming in for. Ask if "in danger" not if domestic violence. "Convince the person this is a useful tool first"
- Currently a language barrier*
- The term self-help. Not one that clients use. People are already overwhelmed this may turn them off the site*
- Not being able to choose multiple options when asked why looking for help*

What features were the most important to you?
- The resources*
- It provides a place to go to; sometimes people aren't ready to seek help yet

- Guided interview was great, self-help step-by-step important. * "Many clients not comfortable with legal process, self-help features help clients get an informed idea before speaking with lawyer"
- Browse help
- Fact sheets* "Many of the moms I work with have limited control over their lives, imagine having access to this would be empowering."
- Ease of navigation*
- Comprehensive tool
- The section with referrals to clinics (VLN, clinics and referral system)
- All pretty important*

Gaps:

What gaps did stakeholders see in the LawHelpMN Guide triage tool that, if filled, would make it more useful for them and/or the community?

During the Feedback and Discussion Sessions (multiple similar responses)

- People might bristle at income question and/or not have the information to fill in a blank. Explain why you're asking and use drop-down menu with banded income.

- Signal what to expect. Like an upfront time estimate or a percentage-completed bar. Or if you can't finish your work will be saved for you.

- Print forms directly from page. Fill out forms online and print completed form.

- "Find a Lawyer" or "Get Legal Help" could be intimidating. "Find" and "Get" are directive words, makes you feel like you have to commit. "In need of legal services?" might be better. The words law, legal and lawyer often have a scary or negative connotation, especially to vulnerable people in crisis. First instinct was to click "find resources", to understand problem. Wanted to know more before selecting "find lawyer".

- The beginning screen or two are the most important to give the user affirmation that, "I can do this." Developers should always keep in mind that users feel both vulnerable and unworthy and often, having been traumatized, reach information overload quickly. For that and other reasons, suggest a "short form" or "express line"—a way for users to get in and out quickly.

- Couldn't find back button. Back button for returning to the previous screen or to beginning looks virtually the same, is in the same place and operates the same way on almost all websites and apps. Doing something different to go backwards is confusing to anyone who has computer experience.

- Self-help word can feel exhausting to people who are already tired and overwhelmed. Although having access to resources/fact sheets are empowering. "Moms I work with have minimal control over their lives."

- Social Services groups pointed out that domestic/intimate partner violence/abuse and sexual assault should be considered separately wherever mentioned or tied to a guided

interview. Sexual assault committed by an intimate partner is domestic violence. But not all sexual assault is committed by an intimate partner. Domestic violence may or may not include sexual assault. Service providers and survivors do not see the two as the same thing.

- Domestic violence pop-up to call 911. May not get a yes answer to the pop-up when you should. Call 911 may not be helpful. People know to call 911 when they are in danger. If they haven't called, they either can't or won't. Provide national or statewide DV and/or rape crisis lines and/or to other local/state websites or resources.

All three groups also felt that it would be wonderful (someday) to include nonlegal resources, preferably after a guided interview like the LawHelpMN Guide that connected them directly to the applicable resources in their community. At minimum, participants hoped that the triage system would provide non-legal information and/or links.

During the Exit Interview, participants were asked:

Which was the LEAST important feature?
- None. All helpful. Everything important. *
- Need to break out the topics more (like custody, foster care, explain difference between SSI and SSDI)
- Color scheme, font
- Income question* (see above)
- Abuse box— (see above)

What would make the site more useful?
- Being able to click more categories
- Add indigenous language, maybe as a welcome
- If you could change one thing about the site what would it be?
- Non-legal referrals
- Not just "here are forms" but "here is the form YOU need"[27]
- Audio reader for those who are not literate or who cannot see well.
- Everyone knowing about the site.
- More fact sheets. Could include more depth (like similar situations with which clients might identify)
- More information for offender and foster care populations
- If there are no legal resources for referral the "we can't help you right now" message could translate into "I knew it, no one ever helps me" for client. Perhaps place more positive emphasis on fact sheets or some way to redesign it so it's not such a bummer when there's no lawyer for you.[28]

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[27] Guiding consumers to the exact forms they need to address their specific legal issue continues to be an Unauthorized Practice of Law (UPL) issue which plagues many. Some online legal triage systems and other nonprofit providers, such as Upsolve.org, resolved this challenge by conveying "most people in your situation have chosen this form"

[28] Keeping in mind that many referral channels were not yet available during the intermediaries' review of the Guide, this was still a thoughtful and thought-provoking response from one participant.

- Being able to click multiple or all categories when asked what help is needed*
- Nothing*
- More links*
- A chat feature would be nice
- Instruction to click at submit task/topic button
- Back buttons that don't make me start over
- Somali language throughout
- Change message/design when you don't get referred to a lawyer
- More felon-related issues

Adoption:

How might the LawHelpMN Guide be adopted most broadly across each stakeholder sector?

<u>After the Session</u>

During the exit interviews, participants were asked how likely they were to recommend the online tool to their peers. All replied likely, very likely or definitely.

<u>During the Group Discussion</u>

During the group discussion volunteers gently pressed each of our groups to share with us how to get the word out about the LawHelpMN Guide most efficiently and effectively, what some of our challenges might be in doing so, what tools to use and what messages would most appeal to their peer groups.
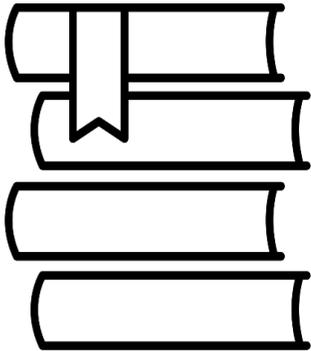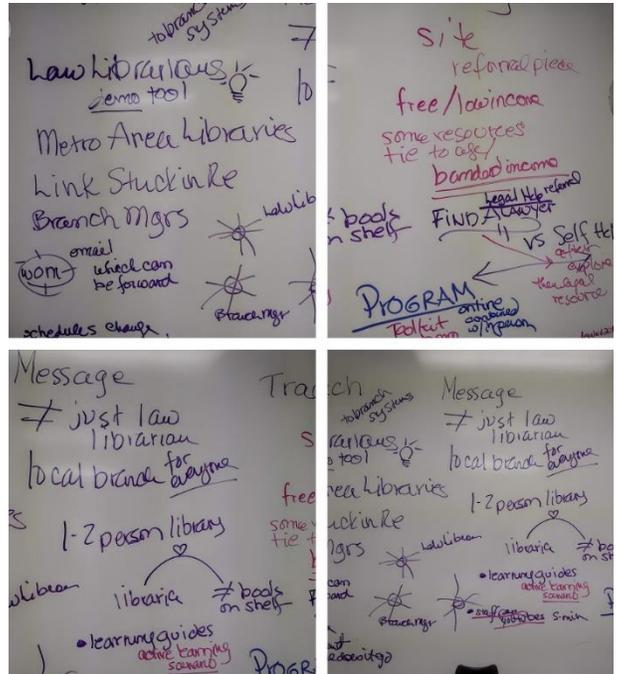

LIBRARIANS:

Key Takeaways

➢ Break through the information clutter. Librarians receive multiple new information resources daily from all quarters'
➢ Find a way to show the site to librarians. If they experience or engage with it, they will love it
➢ Look not just to public and law libraries but to other specialty libraries as well. [29] For example, Minnesota has several businesses with their own company libraries. One of our participants used to work in one and occasionally received questions on personal employment issues from her patrons that were not appropriate for her to answer.
➢ Librarians will point patrons to the right resource and help get them started but they will not guide or facilitate use. They are very cognizant of patron/user privacy.

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[29] https://en.wikipedia.org/wiki/Special_Libraries_Association "given the rapid adoption of information technologies for selecting, analyzing, managing, storing, and delivering information and knowledge, the average SLA member might be performing a range of services and employing a diverse mix of skills related to, but not exclusive of, library science. In fact, it is likely a special librarian does not work in a library, but rather an information center or resource center.

Outreach and Education Target Audiences

- Statewide and national library-related associations and conferences
- Metro area librarians
  - Branch manager as conduit
- Rural librarians
  - Often only 1-2 librarians
  - Start with branch manager
  - Offer community programming through local legal aid. Bring staff and pro bono lawyers to answer questions (will increase attendance) and also demo LawHelp MN and the Guide for community and librarians.
- Special Library Association members include law libraries, news libraries, corporate libraries, museum libraries, medical libraries, and transportation libraries.

Use/Create Tools

For the librarians to use with peers, give them:

- A draft email they can easily forward
- Digital pamphlets
- 2 to 5-minute YouTube demo, and/or
- A link to the site *with language or graphics that entice them into opening it*

It is best to have the branch manager, or another librarian share information with her colleagues as "something they should know about" rather than have it come from someone or some organization they don't know. Our librarian participants all said they would be willing to do that.

For library patrons, provide postcards, "business cards" or flyers that can be left on site for librarians to give to patrons.

Consider developing an online or leave-behind toolkit that contains everything librarians and patrons might need.

Develop Meaningful Messages

Orient the librarians to this new resource:

- Explain the site's purpose.
- Not just for law librarians because its "legal" (explain how it will benefit *them*).
- Free resources targeted to low-income (make sure librarians know why the income question is asked as they will be asked). Self-help information/Fact Sheets for everyone.
- Explain the difference between a "find a lawyer" referral system and self-help.

SOCIAL SERVICES

All but one social service provider was located in the Bemidji area, thus the discussion reflected a more rural perspective[30]

Key takeaways

➢ To get the word out, work through community foundations, other funders or existing groups coordinating community response. United Way agencies may or may not exist.

➢ Rural areas have so few resources and everyone knows everyone else so if you focus your attention on those groups, you will reach almost everyone you need.

➢ Each locality may have a different hub that their community service providers (CSPs) look to for information distribution. In some areas multiple CSP's may organize around a specific population or issue.

To maximize your impact and minimize your efforts and expenditures, you should:

Target Audiences/Events
- MN Council of Nonprofits
- Community Sexual Assault Response Teams (SART) teams (11 county hubs)
- Student Health Centers
- Law Enforcement
- Community Health or Services fairs

Use/Create Tools
- Social Media, especially Facebook
- Cards for Law Enforcement to carry
- Brochures or flyers for health fairs or any event where a provider might have a booth

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[30] Results of the Ontario Trusted Help Report on intermediaries suggests that:
- Rural frontline workers are somewhat more comfortable about providing basic information about legal rights and procedures than their urban counterparts. They are less likely, however, to have accompanied people to meetings with legal service providers or to tribunal or court hearings.
- Organizations serving Indigenous, rural, and northern communities often face additional barriers. Fewer services are available to them. They also contend with distances that make it more difficult to attend training and networking events and can limit possibilities to form connections and trusting relationships.
- Non-English Speaking and/or ESL intermediaries and their clients also have the challenge of limited access to legal information. They have fewer tools and services available in French, as well. Trusted intermediaries working with other languages and cultural groups also face specific barriers, such as lack of training geared to the populations they serve

http://www.lawfoundation.on.ca/wp-content/uploads/LFO_TrustedHelpReport_Part2_EN.pdf p. 13

Develop Meaningful Messages

Holistic approach- we will help you address all your clients' needs/barriers to success. Legal as part of wrap-around services/continuum of care.

How legal problems are entwined specific to their work. For instance, a domestic violence assistance provider might immediately think of divorce, custody, protective orders as legal issues—but may not think of how law interacts with self-sufficiency—from expungements, to credit/consumer issues. A child services provider might not think of expungements, education law, family stabilization through housing and benefits.

Address and treat social services providers as professionals and knowledgeable experts in their own right. Many have been condescended to by judges and lawyers or see the legal system as a barrier, not a boon, to meeting their clients.
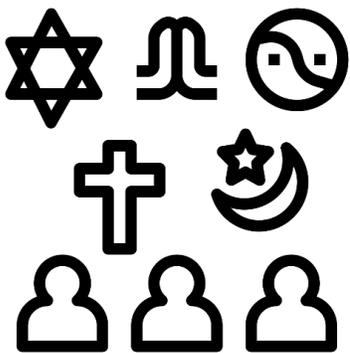
FAITH-BASED

Given our faith-based participants' time constraints, the project team was not able to gather them as a group. Instead they were visited individually. The group included current and former faith leaders, individual lay volunteers and a husband and wife team who worked together in ministry. Participants included members of the Presbyterian, Pentecostal, Muslim and Catholic faiths.[31]

Participant viewpoints are included with the other groups' feedback in the Queries section. What was most important to this group was the ability to help someone research their issue and know their rights, to have the resources organized all in one place and the resources and the legal information to be accurate and up-to-date.

Outreach and Education Target Audiences
Most were willing to share with the congregants of their place of worship and as well as to use in external missions and ministries. Reaching out to faith leaders and working through their networks as well as working with and through local and statewide faith alliances would likely be productive.

Communicate with local bar associations about how this resource can be used in ministry--as many members are active members of congregations and already provide some pro bono services through their house of worship. Some churches also have legal clinics and/or computer labs.

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[31] Executive Director of the Interfaith Council of St. Paul, Randy Ilyse Roth, assisted in the recruitment of an eclectic group of faith-based participants. Randy also provided her own perspective, as a former public interest lawyer and as a nonprofit and foundation executive.

Community and family foundations also provide small grants to churches to give to parishioners for one-time emergencies.[32] Identifying, contacting and educating these funders could provide an informed cadre of "influencers".

Use/Create Tools

Flyers, local legal aid programming with demonstrations of the Guide, peer-to-peer talking points for early adopters and faith leaders to use with their peers and take to meetings. Offering to speak at or demonstrate the Guide at faith alliance meetings.

Develop Meaningful Messages

The convenience of having legal resources all in one place, being able to get done what they need to get done in real time.

Specific information on the kinds of legal issues that are pertinent to the population they serve or the issues they are addressing.

NOW WHAT?

Next Steps

The new LawHelpMN site and the Guide are now live. The site launch has been publicized to the legal community through newsletters and bar publications, and a training for legal services staff. Presentations to self-help center staff, library groups, 211[33] specialists, and Congressional constituent advocate staffs are scheduled. Brochures featuring the Guide have been distributed to legal aid offices and library partners. The next step is to expand outreach and presentations to the broader social service and faith-based community, including those who engaged in this project. State Support staff plan to specifically reach out to the focus group participants to let them know the site is live, how their feedback was used, and to share outreach materials they can distribute to their communities.

The Triage Portal Advisory Committee (TPAC) was created by the Minnesota Supreme Court as a governance structure to make sure that there is long-term support for the Guide with the necessary resources to improve coordinated referrals over time. TPAC members include library and social services stakeholders. TPAC's work includes the creation of an evaluation plan for the Guide, including use of Google Analytics and other metrics.

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[32] Consideration might also be given to reaching out to the Minnesota Council on Foundations https://mcf.org/ which has peer networks such as the Family Foundation Network and The Rural Funders Working Group as well as its own conferences.

[33] In many states, dialing "211" provides people in need with a shortcut through what can be a bewildering maze of health and human service agency phone numbers. 2-1-1 is available to approximately 270 million people, or about 90% of the total U.S. population. www.211.org

How the Results will be Used

Many of the observations from the trusted intermediaries during design research sessions were considered and reviewed as part of our larger user testing feedback cycle. In particular, some of the feedback from users about the domestic violence warning pop-ups was incorporated in a revision of the Guide questions to minimize the places where that warning appeared. Since the content migration had only just begun when these sessions were held, the suggestion to include more resources was *de facto* incorporated as State Support staff continued to migrate content to the Guide and the site's library.

The suggestion to include more content in other languages is being implemented as development continues on our *mirror sites* in Hmong, Somali and Spanish and State Support staff will be working to transfer and add content to those sites. However, the Guide is not planned for other languages given the volume of questions and the challenge of translating 12 streams of questions. That said, the feedback about the value of multi-lingual will be used to determine priorities for site changes, including evaluating adding the Guide in other languages.

Suggestions that were not incorporated, such as allowing a user to select multiple topics at the outset, are certainly ideas State Support staff will keep in mind when reviewing the effectiveness of the site. A primary goal in moving to a new site, and creating the Guide, is to allow more iteration and improvement. As the site evolves, there will be close monitoring on how the Guide is working for users. Technological advances and changes will be a major factor in determining how the Guide can best serve users.

The suggestions about how to increase adoption of the Guide and reach out to trusted intermediaries who can benefit from the Guide and site will be incorporated and help guide our outreach strategies in the next few months. In particular, the recommendation from both librarians and social services to reach out to central points of contact (such as community foundations or a library branch manager) is an approach State Support staff are employing. This will help minimize our time spent contacting many individuals and instead allow us (and the target groups) to leverage existing networks to share and amplify the information about the Guide. The infographic developed by a volunteer from this project was a response to the feedback generated in these sessions. The librarians' feedback in particular will help us develop additional education materials for both intermediaries and users.
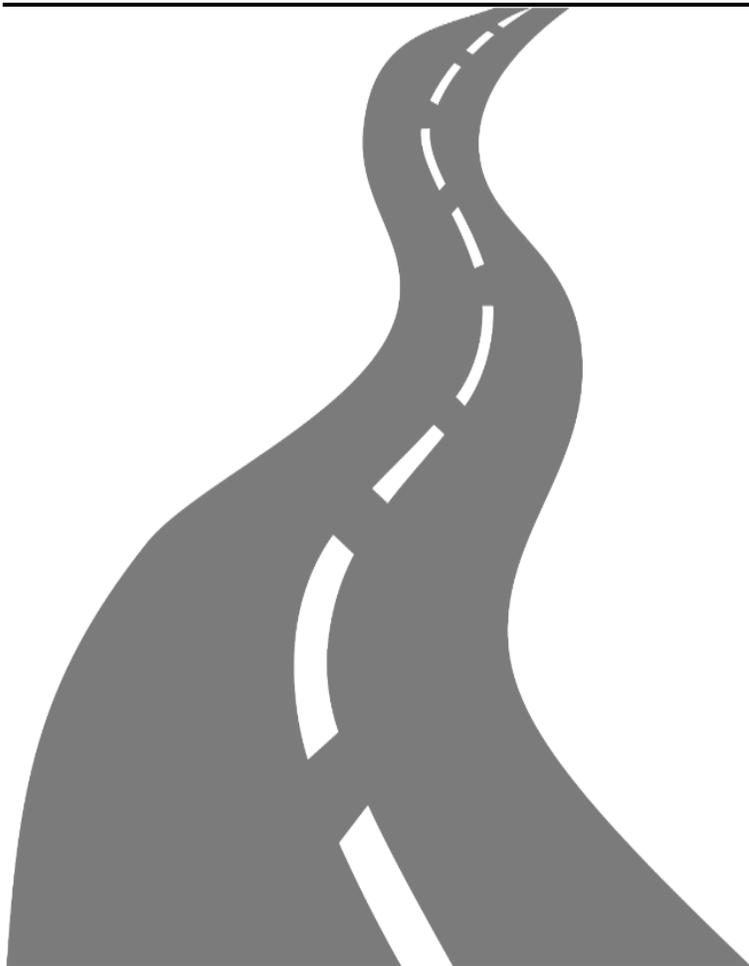
In the coming months, users of the redesigned LawHelpMN site and the Guide will be able to access online intake directly within the LawHelpMN Guide for a seamless user experience from the online triage system to an online intake application.

For others it is hoped that this report provides:

❖ *Greater awareness of the role trusted intermediaries could play in bridging the justice gap.*

❖ *Greater understanding of the role librarians, community service and faith-based providers already play.*

❖ *Access to processes, tools and tips that you can modify and use.*

❖ An awakening to the reality that… most people with legal problems aren't calling a lawyer, going to legal aid, visiting a court self-help center or going online for legal information.

"Low-income Americans rarely seek professional help for the legal problems they most commonly experience—those resulting from health issues and consumer and financial disputes—either because they think they can manage without lawyers, or don't see the problems as legal ones. Rebecca Sandefur, who advised LSC about its justice-gap survey, says this pattern suggests **we need to completely re-think our outreach strategies—to radically re-think how we connect people to services***.*"[34]

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[34] Caplan, Leonard, The Justice Gap: America's Unfulfilled Promise Of "Equal Justice Under Law", Harvard Magazine, https://harvardmagazine.com/2017/11/unequal-justice-america

OTHER LESSONS LEARNED

Planning and Logistics

In order to determine what types of entities would be able to send participants a number of conversations were held with State Support staff.

The work plan was for sessions to be held in one urban area and one rural area. The Twin Cities was the natural choice for the urban location. Rural profiles were developed for 5 other areas in Minnesota with a focus on four key factors: poverty levels, special populations or issues, the presence of a community college or university and a baseline concentration of social service providers from which to draw participants.

The profile of City of Bemidji/Beltrami County at page 62 is an excerpt from one of the rural profiles and where the project team ultimately decided to conduct our rural part of the project.

Recruiting Participants

> This was one of the most time-consuming parts of the project. The project team remained aware that every communication created impressions that would inure to the benefit or detriment of the local legal aid program as well as to other access to justice stakeholders in the state. We also wanted to recruit entities with which the local legal aid already had relationships as well as with those they did not.

> In addition to tapping into the existing relationships of the local legal aid program, one of the most effective jumping off places for recruiting seemed to be through introductions to the executives of influential nonprofits or funders in the community. The local United Way, Community Action Program or community foundation may be good places to start.

> Connecting with these execs, explaining what you are trying to do and then asking them what agencies to work with may award you a resounding "yes" when you also ask if they would provide you an introduction or allow you to use their names. One executive director of a community resource organization even wrote to her peers in the community *for* us.

> When reaching out to the target organizations the project team once again started at the top. We talked to a number of executive directors who were excited about what we were doing and quickly identified the right employee or volunteer. Not only does this save your prospective participant the awkwardness of having to ask a supervisor for time off, he or she is also much more likely to respond to you when you are putting together schedules and to show up at the feedback session despite professional conflicts or demands.

Recruiting and Training Volunteers

> Students from the University of Minnesota law and design schools were used as volunteer observers and interviewers for the urban participant meetings. They attended an in-person training that was hosted by the Faegre Baker Daniels law firm which also videotaped the training for use by the rural area volunteers.

The history and principles of design thinking and its use in the law were covered. User personas were created for librarians and social workers as volunteers were expected to take a subjective, empathetic view in their questioning and observations.

Bemidji State University's Social Work Department chair offered to have her social work research students serve as our volunteers. The training video was reviewed and discussed during class time and students were given assignment credit for serving as volunteer observers and interviewers.

Space

The project used free or low-cost space. Initially, the project team was hopeful university or library computer labs and adjacent rooms could be used, but the September/October (start-of-the-school year) timing of our sessions and the need to use the space for an entire morning or afternoon made it difficult to find appropriate space.

In the Twin Cities, we were lucky to secure meeting space in the St. Paul office building where Legal Services State Support is located.

In Bemidji, we held our first sessions at the Northwest Indian Community Development Center in the space typically used for their largest meetings including their regular Drum Circle. Holding the sessions at a community service provider centrally located to and trusted by the area's Native American population was absolutely critical.

Our second set of rural sessions took place at the Beltrami Electric Cooperative (pictured right). For those doing rural projects, electric membership co-operatives[35] often have very well-outfitted space available for community and nonprofit meetings at a nominal cost.

Incentives.

Volunteers received meals, gift cards ($10-15) and mileage reimbursement. Participants received $100 gift cards for spending 1-2 hours with us. We made snacks and refreshments available at all times to everyone.

Computer and Wi-Fi access

Because the project team was not able to use technology labs, we had to provide sufficient laptops for participants to test the LawHelpMN Guide. That mean someone had to set them up and keep them running. One of the nonprofits in which we held a feedback session did not have strong enough Wi-Fi to support multiple users.

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[35] https://www.electric.coop/our-organization/nreca-member-directory/

Collecting and synthesizing the responses.

> The online surveys were put together using Survey Monkey and the results were simple to synthesize and to parse by sectors and by rural or urban.

> The exit interviews were short answer open ended questions, making them a little but more challenging to collect. We used Google Sheets.

> The observations were the biggest challenge as they noted body language, facial expressions and the expressions and questions of each participant as he or she used the LawHelpMN Guide. The length and variety of observations did not lend themselves well to a collection device that would make synthesis easier.

> We had decided not to have volunteers collect real-time observations and exit interview responses by computer for two reasons. Using a laptop to take notes would have been extremely distracting to the participant and it would have required volunteers to bring and use their own laptops. We were overly optimistically hoping the volunteers would be able to download handwritten observations and exit interview responses after their interactions and before departing the premises.

Inclusivity

In reviewing the racial, ethnic and poverty demographics of our locations, the project team focused on trusted entities that served representative populations.

Bemidji is located in Beltrami County, Minnesota's 4th largest county in land area, with a population of more than 15,000. Beltrami also has the highest poverty rate in the state. While 78% of Beltrami's population is Caucasian, the largest percentage of its population of color is American Indian. More than 1800 people, 12% of Beltrami's population, are Native American. Parts of two reservations (Leech Lake and Red Lake) lie within Beltrami county with a third reservation (White Earth) close by.

Project team members understood that no matter our own experiences in Minnesota, in rural areas generally or serving a variety of populations, outreach to Beltrami's own community leaders was critical. For that reason, there were several pre-session phone calls and meetings with local leaders representing various constituencies to insure an inclusive and culturally appropriate process.

Of particular importance was reaching out to Dr. William Blackwell, executive director of the Bemidji State University American Indian Resource Center. Dr. Blackwell was very generous with his time and his advice.

With the limited amount of time in Bemidji, Dr. Blackwell recommended a focus on tribal members who lived in or near town rather than on trying to hold our sessions on one of the three close by reservations. It would have

been disrespectful and burdensome to expect members of one tribe to travel to another tribe's reservation. Dr. Blackwell also pointed out that for tribal members to take us seriously, feel respected and participate, our *volunteers* would have to include tribal members.

Strengthening Community Relationships

"We remained aware that, with every communication, we were creating impressions that would inure to the benefit or detriment of the local legal aid program as well as to other access to justice stakeholders in the state. We also wanted to recruit entities with which the local legal aid already had relationships as well as with those they did not." Recruiting Participants, Page 32

Every intersection with trusted intermediaries during the recruitment, engagement and follow-up stages of a project like this is a unique opportunity to begin or strengthen a relationship on behalf of the local legal aid program and/or the state access to justice community. You are an emissary, indirectly doing community outreach and education about access to justice--even though you may not be from the locality, or sometimes even the state, in which you are working.

Be diplomatic, transparent, trustworthy, listen and connect.   Start with the local legal aid program(s) leadership and let them know what you are doing, ask their advice.

Remember that trusted intermediaries are professionals, have a deep understanding of local culture and see a different side of community and individual needs than even a longtime, local legal aid lawyer might. When conducting this kind of project, seek guidance from trusted

intermediary group leaders and other community stakeholders on who to talk to and how best to proceed.

Let everyone know you are seeking as much diversity of perspective as possible and let them tell you what respect looks like to the diversities you are seeking.

2018 BUSH PRIZE WINNER!

NORTHWEST INDIAN COMMUNITY DEVELOPMENT CENTER

One of the most important human-centered design mindsets for those who want to create successful and meaningful experiences for others in finding legal information self-help resources or using an online service like the LawHelpMN Guide is empathy[36]. The capacity to empathize with community service partners is as important as empathizing with your clients.

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[36] Klemola, Meera, Why Every Organization Needs Legal Design, Medium, Mar 5, 2018 "At the heart of legal design is human-centeredness and **empathy** — a deep understanding of users intellectual, social, emotional and physical needs. Currently, law can lack this…This results in a large gap between the law, lawyers and the end users of legal information and services. Legal design addresses this gap by integrating human needs into the development phase of legal solutions." Legal design results in legal information, services, products and processes that are transparent, accessible, understandable, useful and engaging for your users. https://medium.com/legal-design/why-every-organization-needs-legal-design-a7395da65ecb

APPENDICES

Volunteer Guide

Minnesota Legal Triage Pilot Project

Volunteer Guide

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Important Dates:

Sept. 14: Volunteer
Training

Sept. 18-19: Urban
Pilot

Oct 3-4: Rural Pilot
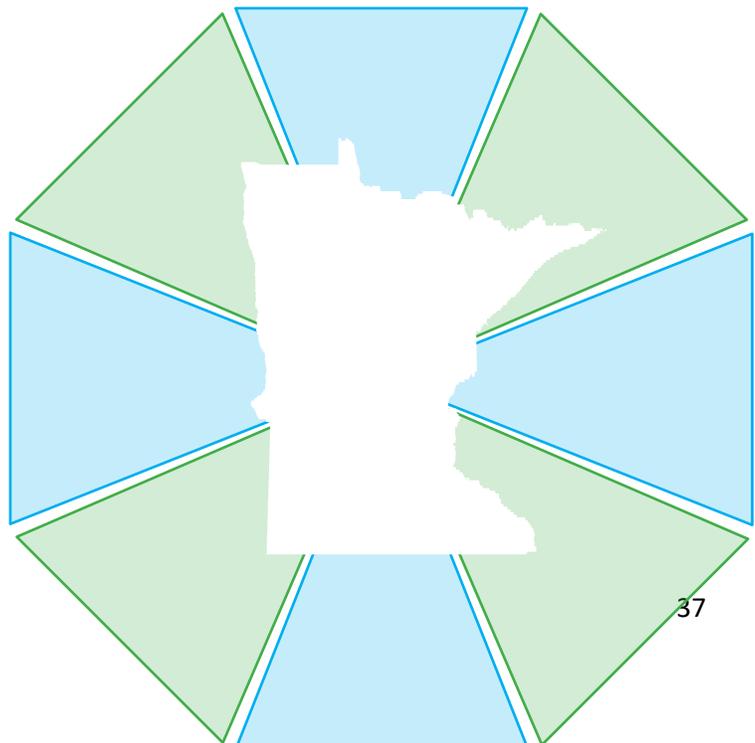
Legal Triage

and Access to Justice

In the medical context, the definition of triage pertains to the sorting of patients and allocation of treatment as related to the urgency of their need for care and according to a system of priorities.

In the legal context, triage most often means a "process to diagnose/understand a person's situation/problem(s) and to provide early education, information, guidance, services and referral that best meet that person's situation and needs (sorting) within the resources available (allocation)."[1]

Several states' access-to-justice communities are beginning to incorporate online triage into their existing legal information portals to help better connect people directly with the legal resources that best suit their specific needs.

1   Boyle, Kari D., Triage – a Vital Tool to Increase Access to Justice http://www.slaw.ca/2013/07/11/triage-a-vital-tool-to-increase-access-to-justice July, 2013.

The Minnesota Legal Triage Pilot

Minnesota was one of seven states awarded Justice for All (JFA) grant funding from the National Center for State Courts intended to assist states in moving toward "100 percent access to effective assistance for essential civil legal needs."[2]

The grant applicants—the judicial branch, Minnesota Legal Services Coalition, and the Minnesota State Bar Association (MSBA)—have been working with the courts, private bar, legal aid, and other partners for several months, looking at key parts of the justice system. As a result, Minnesota is integrating a triage tool into the LawHelpMN statewide portal.[3]

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2   Conference Of Chief Justices/Conference Of State Court Administrators (CCJ/COSCA) Resolution 5 Reaffirming The Commitment To Meaningful Access To Justice For All, 2015 http://www.ncsc.org/~/media/Microsites/Files/access/5%20Meaningful%20Access%20to%20Justice%20for%20All_final.ashx.

3   Parrell, Betsy, Innovations for Clients: Online Triage System on the New LawHelpMN.org, http://www.mnlegalservices.org/legal-services-in-the-news/2018/4/30/innovations-for-clients-online-triage-system-on-the-new-lawhelpmnorg, April 30, 2018.

However, recent studies[4] show that most low-income people who need legal help never call an attorney or visit a legal aid office or court self-help center.

"Low-income Americans rarely seek professional help for the legal problems they most commonly experience—those resulting from health issues and consumer and financial disputes—either because they think they can manage without lawyers, or don't see the problems as legal ones." Rebecca Sandefur, who advised LSC about its justice-gap survey, says this pattern "suggests we need to completely re-think our outreach strategies—to radically re-think how we connect people to services."[5]

In order to get legal help to those who may not know they have a legal problem, we hope to create a gateway to legal information and services through domestic violence and homeless shelters, schools, churches, public libraries, healthcare, and social service providers. Librarians, shelter advocates, school counselors, and social workers would then themselves become user/facilitators of the LawHelpMN triage system. We call these "**trusted intermediaries**."

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4   Legal Services Corporation, The 2017 Justice Gap Report, Measuring the Unmet Civil Legal Needs of Low Income Americans, https://www.lsc.gov/sites/default/files/images/TheJusticeGap-FullReport.pdf June 2017 and Sandefur, Rebecca L., Accessing Justice in the Contemporary USA, Findings from the Community Needs and Services Study, http://www.americanbarfoundation.org/uploads/cms/documents/sandefur_accessing_justice_in_the_contemporary_usa._aug._2014.pdf August, 2014 American Bar Foundation.

5   Caplan, Lincoln, The Justice Gap - America's Unfulfilled Promise Of "Equal Justice Under Law" https://harvardmagazine.com/2017/11/unequal-justice-america Harvard Magazine, November-December 2017.

Primary Objectives

The goals of the project are to determine:

− Whether the LawHelpMN triage tool could be used in the community work of the stakeholders (the "trusted intermediaries").

− How the stakeholders could use the LawHelpMN triage tool most effectively in their community work.

− What gaps stakeholders see in the LawHelpMN triage tool that would make it more useful for them and/or the community.

− How the LawHelpMN triage tool could be adopted most broadly across each stakeholder sector.

Volunteer Roles

You will be helping us test how the stakeholders/trusted intermediaries' response to the LawHelpMN triage tool. As a volunteer, you may have one or more of these roles:

- **Live Observer:** you will take notes on your observations as the trusted intermediary tests the Triage tool. After the session, you will use one of the computers onsite to record your notes into Google Forms.

- **Live Moderator and Exit Interviewer**: you will interact with the trusted intermediary and draw out their real-time, spoken reactions as they use the Triage tool. After the session, you will conduct an exit interview with a trusted intermediary, preferably not the same person from the moderating session.

- **Group-Discussion Scribe**: you will take notes as the participants are led in a group discussion about their testing experience.

Noise and Distraction

It is critical that we do not disturb or distract the participants. In that light, please keep the following in mind while volunteering:

- Bathrooms and hallways are especially hazardous for discussions. Even during a session, the next trusted intermediary may be waiting nearby.

- Please avoid laughing or shouting during sessions. Rooms are not completely soundproof.

- Turn computer notifications and phone ringers off. If you must take a call, please do so where you can't be overheard or accidentally recorded.

- Please don't distract anyone by talking during the session. If you must make a comment to someone, pass a note.
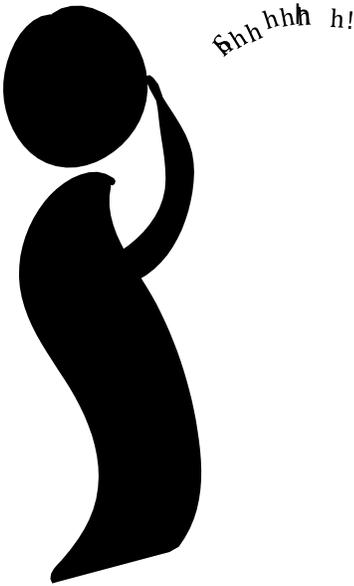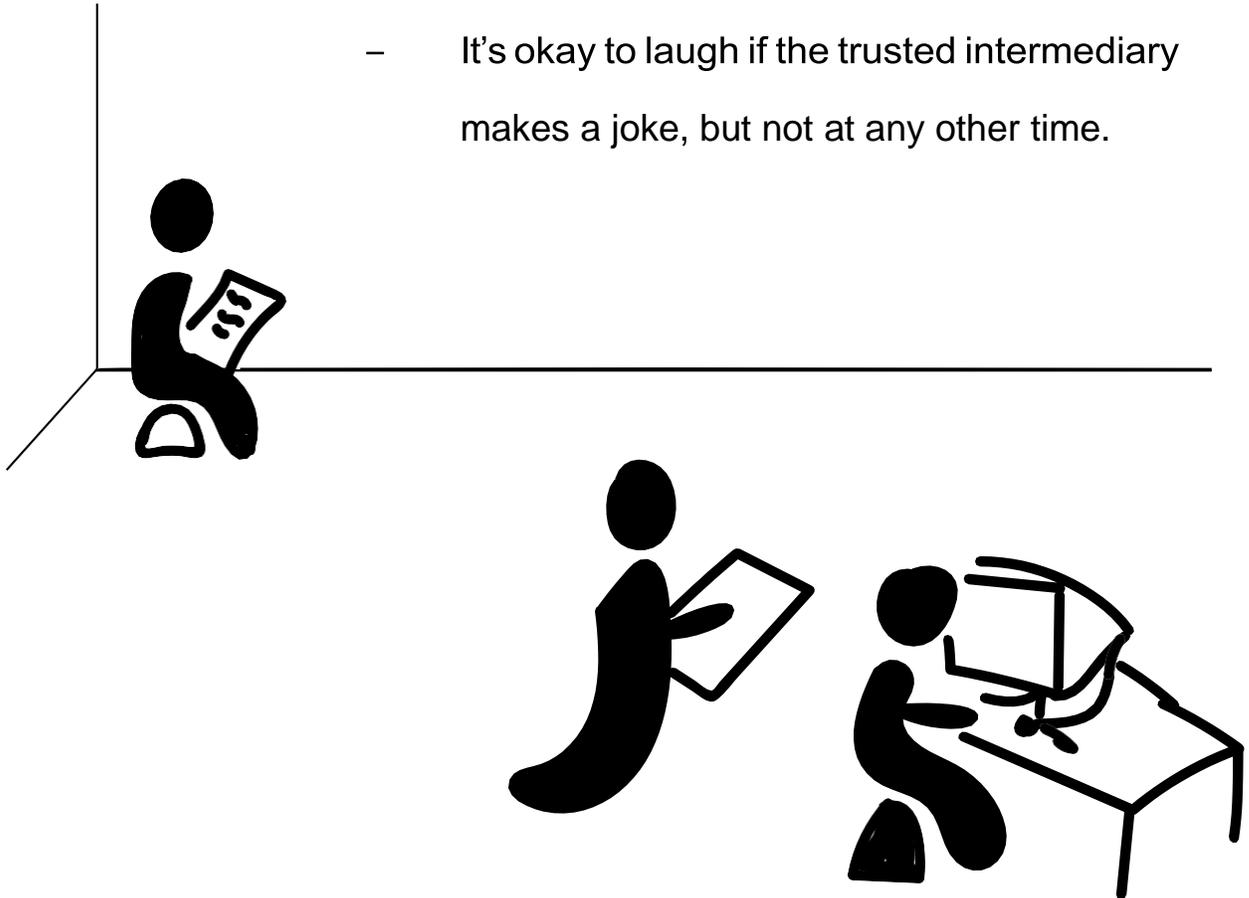
Live Observer Directions

As the observer, you want to be unnoticed, like the plant in the corner.

- Please sit out of the trusted intermediary's line of sight (behind them) and try to be completely silent.

- Smile in a friendly way and watch carefully while taking notes.

- During and before the sessions, don't engage participants in conversation, offer advice, correct them, or answer their questions, because introducing new information or giving unintentional clues can bias the results.

- Answer only a question if the moderator asks you directly. It's very common for moderators to ask participants questions that they already know the answers to, questions to help the user relax, and questions to find out what the participant understands. Don't answer those questions either. It's important to understand what the participant believes to be true, even when that's not technically correct.

– Be careful not to distract anyone.

Your fidgeting, sighing, posture, facial

expressions, noise from phones or clothing,

and so on, can easily change the trusted

intermediary's behavior and comfort level.

If you need to, please leave the room quietly.

No in and out.

– It's okay to laugh if the trusted intermediary

makes a joke, but not at any other time.

Live Observer Notetaking

The moderator will be following a scripted set of questions and actions. You will have a copy of this script with the questions. As the trusted intermediary responds to the questions, please fill in the responses in the appropriate boxes on the worksheet, so we can track responses.

In addition to filling out the worksheet, take many notes. Write about everything because you don't know what might prove valuable during data analysis. Make sure to have plenty of notecards on hand before the session begins.

Each participant was assigned one color of note card or one notetaking document. Changing documents and colors between participant sessions is mission critical, so please help ensure that it happens.

After the moderating session, you will enter your notes and the responses to the moderator's questions into a Google Forms document. We will have designated time and space available for you to do this after the moderated session.

Live Observer Notetaking

Include the scenario letter on each note.

Add your initials or name to your note, so we know who to ask if we

don't understand something.

Write one observation per note, so we can sort them into categories later.

Don't write paragraphs with several ideas;

just keep notes in sequence when they go together.

Don't write on the back, in case we need to cut them into sections. ——

Observers: Examples of Effective Notes

Mistakes

She didn't click Save before closing the window.

He skipped the City field on the address form.

System Errors

The menu didn't drop down the first time she clicked it.

Click Paths and Navigation

Home > New Car > Vehicle Type > Back > Model > Back (looking for "vans")

Searched "ford truck" > Ford.com > Trucks & Vans

> F-150 > Models

Quotes

"I expected this to work like Amazon."

"This is great!"

Body Language

She looked confused at the very beginning, but not later.

She seemed very comfortable with the third page.

Anything Else!

Anything that seems overlooked, misunderstood, ambiguous, or confusing.

Suggestions, questions, and comments (including your own).

Live Moderator

As the moderator, you will ask the trusted intermediary leading questions as you guide them through the site. The observer will record the responses. Please stick to the following format:

DO THIS	ASK THIS
1. Take participant to the home page:	"Where would you or a client start if you wanted help?" **And then, based on what they indicate, ask:** "Why did you select that option?"
2. Have them click the "Get Legal Help" or "Start Here" button **(the entry point for Triage) and stop at 1st Page of Triage.**	"What was your first impression when you entered the site?"
3. Have them go through the first 3 questions, which are "screening" questions.	"How do you find these questions?" "Is there anything here that is confusing?"
4. Stop At 4th Page	"Is this page: b. Easy to understand for a client/community member?" c. Easy to use for you?" d. Easy to use for a client or community member?" "How would you make this page easier to use?"

DO THIS	ASK THIS
5. After Selecting a legal topic, pause them on Question 1:	"Is this easy for you to understand?" "Would it be easy for your client? "Is it easy for you to use? " "How would you make it easier?"
6. Allow them to click through, and for each additional question until they reach the end:	"What are your impressions here?"
7. At the final Page	"What do you think about the outcome?" "What did you expect?"
8. Have them click "Find a Lawyer"	"Why would you select this?" "Would you ever *not* select this option?" "When or why would you not?" "What do you think about the questions it asks next?" "Is it easy to understand for you? For a client or community member? Easy to use?" "Would a client or community member understand?"

Exit Interviews by Moderator

After moderating a session, you will also conduct an exit interview with a trusted intermediary, preferably not the same one from the moderating session.

The exit interview consists of ten questions, which we will provide for you in a worksheet form. The goal of these questions is to gather impressions about the Triage Tool immediately after its use. Please fill out the worksheet with the participant's answers as they respond to the questions.

Other Instructions

Help us improve our interviews at our next session or pilot. When you think of a question you would have liked to have asked the participant, please write it down. Near the end of the session, the facilitator will collect these.

Please review the notetaking instructions and materials. It is critical that you follow these instructions during the moderating session and that you help us digitize your notes by filling them into the Google Forms that we have created.

Please arrive on time and ask questions.

Thank you for your help!

In-Person Training Agenda

AGENDA

JUSTICE FOR ALL VOLUNTEER TRAINING

Friday, September 14, 2018
11:00 am to 2:30 pm
Faegre Baker Daniels
2200 Wells Fargo Center, 90 S. 7th St.
Minneapolis, MN 55402, Floor 22

11:00	**WELCOME/INTRODUCTIONS**	**Kelly Tautges,** Pro Bono Counsel/Dir. Of Pro Bono & Community Services, Faegre Baker Daniels
11:15	**THE JUSTICE FOR ALL PROJECT**	**Bridget Gernander**, Legal Services Grant Program Mgr., MN Sup Court **Emily Good**, Legal Services Statewide Support
11:30	**INTRO TO DESIGN THINKING**	**Deb Lawton**, User Design/Lecturer Univ. of MN College of Design
12:30	LUNCH/BREAK	
1:00	**DESIGN THINKING IN LEGAL**	**Emily Good**
1:30	**DESIGN RESEARCH TOOLS**	**Melissa Moss,** Consultant, CatalystZone
1:50	**VOLUNTEER ROLES/Q & A**	**Emily Good** **Melissa Moss**
2:20	**NEXT STEPS/WRAP-UP**	

OUR SINCERE APPRECIATION TO FAEGRE BAKER DANIELS FOR SERVING AS OUR HOST

Training Video

The training for volunteers at Faegre Baker Daniels' offices in the Twin Cities was recorded live by the firm. The video will be made available online along with this report after publication.

As the training was approximately 3 hours long, the following guide to excerpts was provided to Bemidji State University Social Work Department Chair Sue Rickers so she could preview the video--then show and discuss with her student/ volunteers during a regular class period.

<u>Video Excerpts</u>

COUNTER MARKER NUMBER	SEGMENT
7:38 to 11:27, 16:01 to 17:58	The Minnesota Justice for All Project
27:34 to 45:50	Intro to User-Centered Design/Design Thinking And why we'd like volunteers to know
1:57 to 2:15	Volunteers
2:20:11 to 2:30:20	Tools and User Personas - because we want our volunteers to observe and interview with empathy/subjectively, not objectively (out of professional dispassion)
2:33:45 to 2:39:53	Volunteer Guide/Volunteer Roles

PUBLIC LIBRARIAN EMPATHY MAP

Demographics

      Gender: Female

      Age: Urban – in their 20s-30s

                      Rural – skews older 40+ (long time employees)

      Job title: Circulation Clerk

      Education: Job doesn't require college degree. Many have studied English or Journalism in Undergrad and may go for master's while working

Personality:

      More likely to be INFP (Introvert, Intuitive, Feeling, Perceptive)

Motivations:

      Interaction with patrons

      Instilling/empathizing with love of reading

Quote:

      "We all have to be problem-solvers because everyone who has a problem is not confident enough to do that for themselves"

Behaviors:

      People Pleaser. A Helper. Customer-Service is intuitive

Fears:

      Sometimes needs affirmation that they don't have to know all the answers just a good idea of where to find them.

Environment:

      Library is cultural hub to the community. Colleagues may be professional kind & helpful to patrons but not always to each other.

Influencers:

      Colleagues, Professional Development (presenters at conference, trainings)

Frustrations and obstacles:

      Logistics. If you're the only one on the front desk you can't help with questions because you may be too busy checking out books. Patrons without any computer skills at all and having to show them how to get online and where, how to do a search. Most people in a hurry. No one browses the stacks anymore--except the oldest patrons. Most people won't even check our online databases/catalogues. Just come to us directly with the question.

How he/she wants to be seen/thought of by her colleagues

      Giving of time and expertise. Ethical (protecting confidentiality). Well read. Personable. Part of the team. Available. Approachable. Hardworking.

Wants/Needs:

      To build trust with the patrons

What constitutes success?

      Matching a person with an author they weren't even considering. When helping them problem solve, finding a reputable source and know they comprehend what they are reading. Fine line between helping people and making them feel like they are being led around.

SOCIAL WORKER EMPATHY MAP

Demographics
　　　　Gender:　　　　Female
　　　　Age:　　　　　25-35
　　　　　　　　　　　(First 5-10 years of career are frontline then going for MSW/moving to
　　　　　　　　　　　supervision/clinical work)
　　　　Job title:　　　Domestic Violence Victim's Advocate
　　　　Education:　　　Undergraduate degree in Social Work
Personality:
　　　　More likely to be INFP (Introvert, Intuitive, Feeling, Perceptive)
Motivations:
　　　　Known for a long time wanted to be a social worker, make a difference. Passion for caregiving.
　　　　Many go in to social work because of their own damage/past issues or desire to fix things they
　　　　couldn't fix in their own families
Goal:
　　　　Doing whatever it takes to fix the client that's standing in front of them
Quote:
　　　　"Social workers carry the pain of all their clients"
Pain Points:
　　　　So much emotional and physical energy expended on the job, nothing left for relationships, kids,
　　　　parents. Job goes home with you and effects everything. Can forget self-care. Burnout.
　　　　Compassion fatigue.
Fears:
　　　　That she "can't fix it"
Environment:
　　　　Isolating. Adversarial relationships. Has to be on protective guard. Fighting for client. Clients
　　　　often angry, frustrated and in pain. May know they need something (like meds) but be
　　　　noncompliant). Have to win over client and make the system work for them. Nobody is on your
　　　　side. People don't like it when social workers get involved--many times they are not seeking you
　　　　out, but you have been requested or required to get involved. Long traumatic emotional
　　　　workdays.
Influencers:
　　　　Colleagues become her go-to people. She mistrusts anyone outside the social work community
　　　　because "they don't get it". Especially dislikes lawyers and judges who refer to her as "just a
　　　　social worker"
Frustrations and obstacles:
　　　　System bureaucracy. Policy and the law are obstacles to her helping/fixing the client.
How he/she wants to be seen/thought of by her colleagues
　　　　Fair. Objective. Does what's right. Not a Pollyanna do-gooder. Wants to be respected and taken
　　　　seriously as a professional. Not just a job.
What constitutes success?
　　　　Positive Feedback from a client. Having the client achieve the outcome they set out to achieve.

APPENDIX B: Participant Tools

➤ **PRE-SESSION ONLINE QUESTIONAIRRE** – *A week before the session, participants received a short online survey to complete*

➤ **FEEDBACK SESSION AGENDA**

> LIVE LAWHELP/TRIAGE SYSTEM TESTING: Each participant had a moderator and an observer
>
> EXIT INTERVIEW After exiting the computer lab, each participant will take part in an exit interview
>
> GROUP DISCUSSION After completing the Exit Interview, most participants took part in a Group Discussion
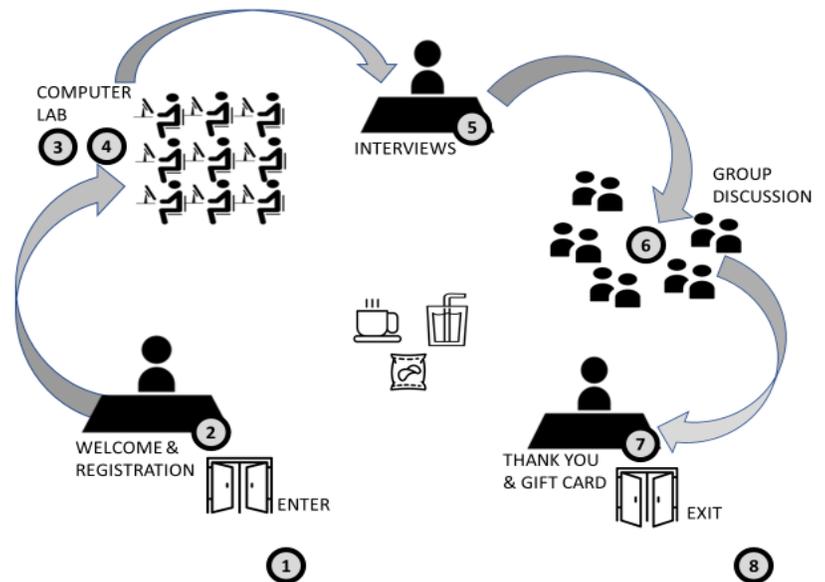
➤ **POST SESSION ONLINE ASSESSMENT** – After the feedback session, most participants received a brief online survey to evaluate the feedback process.

PRE-SESSION ONLINE SURVEY

Purpose: To help us understand how our trusted intermediary participants engage with the members of their local community

Collect: Name, Age Range, Education level, Job title, Organization, Preferred contact Info (Phone Text Email)

TYPE	QUESTION	ADDITIONAL
1. Short answer	Why do people come to your organization for help?	Comment Box
2. Checklist (check as many as apply).	How would you describe the professional or volunteer work you do to help clients/ community members?	Incl. "Other" w/Comment Box
3. Multiple Choice	Is the internet ever a source of help or information for you in your work with clients/community members?	Never, Occasionally, Often, All the Time

4. Forced Ranking 1-10	What do you see as the biggest obstacles in the lives of the clients/community members with whom you work?	✓ Poverty ✓ Housing ✓ Domestic Violence ✓ Access to Affordable Healthcare ✓ Mental Health ✓ Addictions ✓ Lack of Education ✓ Lack of Employment ✓ Credit Issues ✓ Access to Transportation Incl. "Other" w/Comment Box
5. Short Answer	How often do people come to you for help with a problem that you identify in part or in whole as a legal need or problem?	Never, A few times a year, Once a Month, Once a Week, Almost Every Day
6. Multiple Choice	Does a client/community member ever tell you they have a legal problem?	Yes, Sometimes, No
7. Short Answer	What do you do if you think if a client/community member might have a legal problem or they tell you they do?	Comment Box
8. Short Answer	How often do people come to you for help with a problem that you identify in part or in whole as a legal need or problem	Never, A few times a year, Once a Month, Once a Week, Almost Every Day

LIVE SCENARIO MODERATOR INSTRUCTIONS AND INTERVIEW TOOL

Purpose: to get real-time, spoken impressions from the user while he or she makes her way through the site.

MODERATOR ACTION	MODERATOR QUESTIONS
Take people to the home page	"Where would you or a client start if you wanted help?" And then, based on what they indicate, ask "what do you think you will find there?" "why did you select that option"
Have them click the "Get Legal Help" or "Start Here" button (the entry point for triage).	
Stop At 1st Page of Triage The first 3 questions are "screening" questions	What was your first impression when you entered the site? "How do you find these questions?" "Is there anything here that is confusing?"

Stop At 4th Page	Is this page:
	    a. Easy to understand for you?
	    b. Easy to understand for a client/community member?
	    c. Easy to use for you?
	    d. Easy to use for a client or community member

	How would you make this page easier to use?
After Selecting A Legal Topic Question 1: Remaining Questions	 Pause them on question 1 and ask "is this easy for you to understand, would it be easy for your client? Is it easy for you to use? How would you make it easier?" then allow them to click through and Ask "what are your impressions here?" for the additional questions until they reach the end
At the Final Page	What do you think about the outcome? Is this what you expected? What did you expect?
Click "Find a Lawyer"	Why would you select this? Would you ever not select this option? When or why would you not? What do you think about the questions it asks next? Is it easy to understand for you? For a client or community member? Easy to use? Is the referral information clear and helpful? Do you want more options? Do you understand how or why you received this information? Would a client or community member understand?

EXIT INTERVIEW TOOL (ONSITE)

Purpose: To gather user impressions about the triage tool immediately after its use

1. How likely is it that you would use this in your work?

2. How could you imagine using it in your work?

3. How likely is it that you would recommend this site to a colleague or co-worker?

4. What do you like most about our site? Why?

5. What do you like least about our site? Why?

6. How easy is our site for you to use? How easy do you think the site would be to use for the clients/community members with whom you work?

7. Which feature of our site are most important to you? Which would be most important for the clients/community members with whom you work?

8. Which feature of our site is least important to you? Which would be least important for the clients/community members with whom you work?

9. What would make the site more useful for you? What would make it more useful for the clients/community members with whom you work?

10. If you could change one thing about our site what would it be and why?

Purpose: to help us understand how best to introduce the LawHelpMN triage tool to each stakeholder group in such a way that it will be accepted, adopted and used broadly and effectively--as well as to create a pathway for ongoing community feedback and response

How could the LawHelpMN triage tool could be adopted most broadly across each stakeholder sector?

How should it be introduced?

What messaging and/or training should be used

POST SESSION ONLINE SURVEY (Not consistently used)

Purpose: To help us evaluate the process and the experience for both volunteers and participants without the pressure or influence of having to do so in-person.

Participants

1. Did you find the site easy to use or hard to use? Can you explain why?
2. How did you feel about the in-person feedback process you participated in? How would you describe it to someone else?
3. What would you want us to do differently next time to improve the participant experience?

Volunteers

1. For those of you who had the opportunity to see the site? Did you find the site easy to use or hard to use? Can you explain why?
2. How did you feel about the process you participated in? How would you describe it to someone else?
3. What would you want us to do differently next time to improve the volunteer experience?
4. What would you want us to do differently next time to improve the participant experience?

Population: 44,442. Portions of Leech Lake and Red Lake Indian reservations are in the county. The county has the highest poverty rate of all MN counties. Beltrami has a total area of 3,056 square miles: 2,505 square miles is land, 551 square miles (18%) is water. It is the 4th-largest county by area.

Resident Population (ACS 2012-2016)	Bemidji	
Total population	14,664	100.0%
- Gender and Age		
Male	7,004	47.8%
Female	7,660	52.2%
Under 5 years	818	5.6%
5-9 years	783	5.3%
10-14 years	662	4.5%
15-17 years	525	3.6%
18-24 years	3,898	26.6%
25-34 years	1,757	12.0%
35-44 years	1,402	9.6%
45-54 years	1,321	9.0%
55-64 years	1,243	8.5%
65-74 years	971	6.6%
75-84 years	753	5.1%
85 years and older	531	3.6%
17 years and younger	2,788	19.0%
18-64 years	9,621	65.6%
65 years and older	2,255	15.4%
- Race and Ethnicity		
White Alone, not Hispanic or Latino	11,541	78.7%
Of Color	3,123	21.3%
Black or African American	169	1.2%
American Indian or Alaskan Native	1,805	12.3%
Asian or Pacific Islander	185	1.3%
Other Race		suppressed
Two or More Races	697	4.8%
Hispanic or Latino total	267	1.8%
Foreign Born	379	2.6%
- Language Spoken		
Population (5 years and older)	13,846	100.0%
English Only	13,317	96.2%
Language other than English	529	3.8%

Northwest Region

The Northwest region's economy lags behind other Minnesota regions, with stagnant job growth over the last two years and one of the highest poverty rates and lowest median household incomes among regions across the state. There are pockets of job growth in some communities in the Northwest region, but housing and transportation expenses as a share of household income are among the highest in the state.

http://www.mncompass.org/trends/insights/2017-09-12-statewide-listening-sessions

% Below Poverty, County Rank, 2016

http://www.mncompass.org/economy/poverty#4-5270-g

83	Blue Earth	15.0%
84	Cass	15.5%
85	Clearwater	16.5%
86	Mahnomen	17.5%
87	Beltrami	18.3%

LEGAL AID PROGRAMS

Anishinabe Legal Services

Legal Services of Northwest MN

APPENDIX D: Law Foundation of Ontario Trusted Help Report

The Law Foundation of Ontario (LFO) is similar to U.S. Interest on Lawyers Trust Accounts (IOLA/IOLTA) programs. Established by statute in 1974, The Law Foundation of Ontario is the sole foundation in Ontario with the mandate of improving access to justice.

In 2016, LFO "selected a team to conduct research to help us better understand trusted intermediaries and the ways in which they could be supported to help advance access to justice for their clients."[37] The resulting Trusted Help Report[38] is an incredible resource for anyone with an interest in trusted intermediaries as connectors to the justice system. It shares "the findings from a literature review, file review, focus groups, interviews, and a survey of more than 400 people, including more than 230 frontline workers in non-legal organizations. The report provides insights into what trusted intermediaries are doing and how comfortable they are doing it".

Challenges Faced by Trusted Intermediaries[39]

Diverse communities

> Organizations serving Indigenous, rural, and northern communities often face additional barriers. Fewer services are available to them. They also contend with distances that make it more difficult to attend training and networking events and can limit possibilities to form connections and trusting relationships. French-speaking intermediaries and their clients also have the challenge of limited access to legal information. They have fewer tools and services available in French, as well. Trusted intermediaries working with other languages and cultural groups also face specific barriers, such as lack of training geared to the populations they serve.

Interest and comfort

> Some frontline workers are interested in serving as trusted intermediaries for clients with legal problems and others are not. Those who are not interested may lack confidence in dealing with the complexity of legal issues and processes. They may not see it as part of their jobs, or the organizations they work for don't support the role.

Turnover

> Relationships take time to build, but they are an essential feature of the trusted intermediary role. Workers who are just starting out or who play a largely administrative role cannot do what those with deeper relationships in the community can do. Community organizations inevitably have high staff turnover and they face the problem of maintaining capacity after a seasoned worker leaves.

Time

> On a busy day, workers may not have the time to discuss the legal aspects of a problem with their clients, to consult information resources, or to attend lengthy training sessions

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[37] http://www.lawfoundation.on.ca/what-we-do/publications-research-and-evaluations/trusted-intermediaries-research/

[38] Ibid

[39] Pp. 33-35 http://www.lawfoundation.on.ca/wp-content/uploads/LFO_TrustedHelpReport_Part2_EN.pdf

that could help them in the trusted intermediary role. This is especially true of workers in small organizations.

Money

Community organizations have the ongoing challenge of limited funding. Their funding may simply not cover all of the client support and services they would like to offer. Money can also be a barrier to accessing trusted intermediary training and supports. Organizations in rural areas and the north, where travel is costlier and more difficult, face additional challenges.

Organizational policies

Leadership and support for the trusted intermediary role within organizations is important. Where organizations serve as trusted intermediaries, the organization and its funders need to see that role as part of its mandate to meet client needs. Someone in the organization should be responsible for overseeing the work. However, sometimes management worries about helping clients in legal areas because of concerns about liability. If the organization does not recognize and support the trusted intermediary role, the workers do not get training and cannot spend much time helping clients in this way. Despite these obstacles, workers typically have a strong commitment to helping their clients and they do some of this work on an informal basis.

APPENDIX E: About the Team

EMILY GOOD – LEAD STAFF

Emily was primary liaison between the JFA project and the LawHelpMN rebuild team. She managed and recruited metro area participants and helped coordinate metro area volunteers. Emily also served as technical expert and trainer about LawHelpMN Guide during all sessions and harmonized site development schedule with focus group schedule to ensure viable product was available for testing.

EXPERIENCE

Legal Projects Manager, Legal Services State Support
Adjunct Professor, Immigration & Human Rights Clinic, University of Minnesota Law School Director, Refugee & Immigrant Program, The Advocates for Human Rights

EDUCATION
- B.A. University of Iowa
- J.D. University of Minnesota Law School

MELISSA PERSHING MOSS – LEAD CONSULTANT

Melissa served as the project process/tools designer and lead facilitator and provided overall management of the project as well as supervision of interns, volunteers and subcontractors. She also managed, recruited and coordinated rural pilot participants and volunteers.

EXPERIENCE

Founder & CEO, CatalystZone, LLC - CatalystZone
Deputy Director/Strategic Initiatives, The Florida Bar Foundation (IOLTA)
Other Legal Aid-Related: Executive Director – Legal Aid of North Carolina, Legal Services Alabama, Program Counsel – Legal Services Corporation Office of Program Performance
Other Nonprofit-Related: Executive Director – The Julian Center (DV/Trafficking), The Damian Center (HIV/AIDS), Board of Directors – Indiana Coalition Against Domestic Violence

EDUCATION

BS, Broadcast Communications, Butler University
JD, Georgia State University College of Law.
Legal Innovation & Technology Certificate Candidate, Suffolk Law School, anticipated completion 2020
Design Thinking for The Social Sector Certificate: Stanford Social Innovations Review (SSIR)
Nonprofit Board Consulting Certificate, BoardSource

MADELINE BUCK – PROJECT SUPPORT & FEEDBACK SESSION LEADER

Madeline designed a system for recording the observations and data from the interviews with trusted intermediaries. She observed and facilitated conversations with librarians as they tested the tool onsite and recruited and interviewed faith-based service providers about the usability and value of the online tool from their perspective. She enjoyed being part of a project where the most common reaction was "when can I share this with others?"

EXPERIENCE

Coord., Int'l Health, Safety & Compliance – University of Minnesota
Law Clerk - Minnesota Supreme Court, Minnesota Judicial Branch
Student attorney, research assistant, legal writing assistant, University of Michigan
Summer Associate, Faegre Baker Daniels LLP
Legal Intern, Natural Resources Defense Council
Fulbright Scholar, US-Norway Fulbright Foundation

EDUCATION

Coursework, Minneapolis College of Art and Design
JD, University of Michigan Law School
Bachelor of Arts (B.A.), St. Olaf College - French, Nordic Studies
Peace Studies, Scandinavian Government, Universitetet i Oslo / University of Oslo (UiO)

JOSIE ADKINS – FEEDBACK SESSION LEADER

Josie assisted with ideation and completion of the user feedback sessions. Taking the skills learned in her coursework at the University of Minnesota, she collaborated with the team to ensure a smooth testing process in order to thoroughly discover project improvements. She also completed the infographics to communicate study findings to the justice community.

EXPERIENCE

- Graphic Designer, Allée Creative
- Sr. Graphic Design Intern, University of Minnesota Recreation & Wellness
- Graphic Design Intern, University of Minnesota Campus Club
- Volunteer Graphic Designer, UMN CSE Week
- Volunteer Graphic Designer, Little Sprouts Learning Center LLC
- Design Competition Winner, Muscular Dystrophy Association

EDUCATION

- University of Minnesota-Twin Cities, Bachelor's Degree in Graphic Design (minor in Mass Communications, emphasis in User Experience), expected graduation May 2019

APPENDIX F: Acknowledgements

- Bill Blackwell Jr., Executive Director, American Indian Resource Center, Bemidji State University
- Anne Hoefgen, Executive Director Legal Services of Northwest Minnesota Legal Services
- Cody Nelson, Executive Director, Anishinabe Legal Services

Participating Agencies & Institutions

For supporting involvement by their staff and/or volunteers as feedback participants

Twin Cities area

- Dakota County Library
- Scott County Library
- Ramsey County Law Library
- Joy's Way

Bemidji area
- Beltrami Area Service Collaborative
- Beltrami County Human Services
- Bemidji Public Library
- Community Resource
- Evergreen Youth Services
- Hope House
- Northern Dental Access Center
- Northwest Indian Community Development Corporation
- Northwoods Habitat for Humanity
- Northwoods Shelter
- Support Within Reach
- Village of Hope

Technology Initiative Grant

Legal Services Corporation

Justice for All Grant

NCSC
Public Welfare