

# APPENDICES

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## APPENDIX A: Volunteer Training & Materials

### Volunteer Guide

# Minnesota Legal Triage

## Pilot Project

## Volunteer Guide

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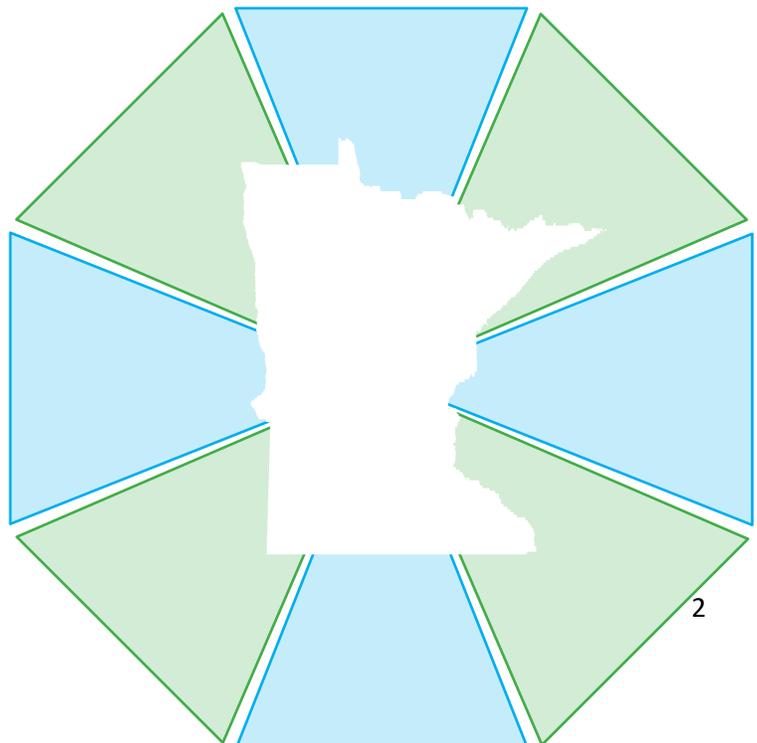
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### Important Dates:

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).”<sup>1</sup>

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.

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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.”<sup>2</sup>

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.<sup>3</sup>

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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](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<sup>4</sup> 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.”<sup>5</sup>

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](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

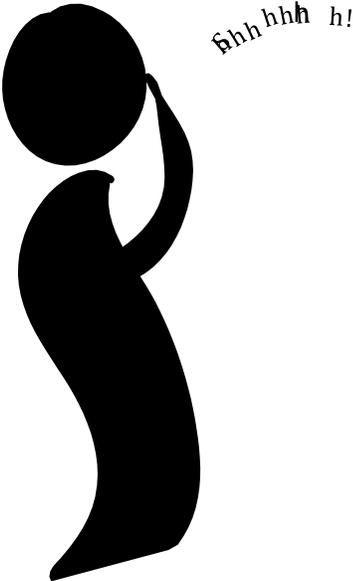
You will be helping us test how the stakeholders/trusted intermediaries' response to the LawHelpMN triage tool. As a volunteer, you may have one or more of these roles:

- **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.



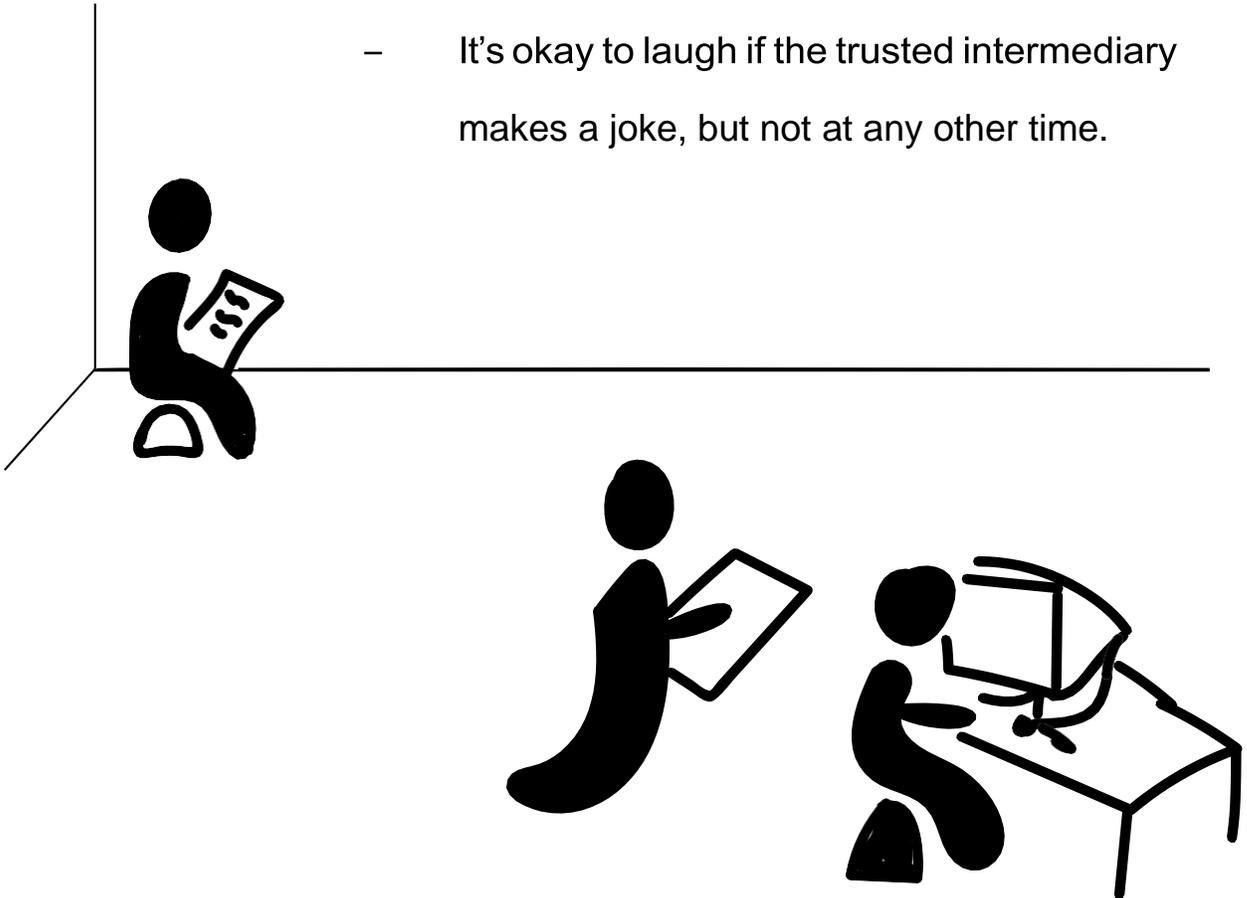
### Live Observer Directions



*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

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

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.

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
<p><b>1. Take participant to the home page:</b></p>	<p>“Where would you or a client start if you wanted help?”</p> <p><b>And then, based on what they indicate, ask:</b></p> <p>“Why did you select that option?”</p>
<p><b>2. Have them click the “Get Legal Help” or “Start Here” button</b></p> <p><b>(the entry point for Triage) and stop at 1<sup>st</sup> Page of Triage.</b></p>	<p>“What was your first impression when you entered the site?”</p>
<p><b>3. Have them go through the first 3 questions, which are “screening” questions.</b></p>	<p>“How do you find these questions?”</p> <p>“Is there anything here that is confusing?”</p>
<p><b>4. Stop At 4<sup>th</sup> Page</b></p>	<p>“Is this page:</p> <ul style="list-style-type: none"> <li>b. Easy to understand for a client/community member?”</li> <li>c. Easy to use for you?”</li> <li>d. Easy to use for a client or community member?”</li> </ul> <p>“How would you make this page easier to use?”</p>



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

## 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

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

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

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## 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.*

### Video Excerpts

<b>COUNTER MARKER NUMBER</b>	<b>SEGMENT</b>
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

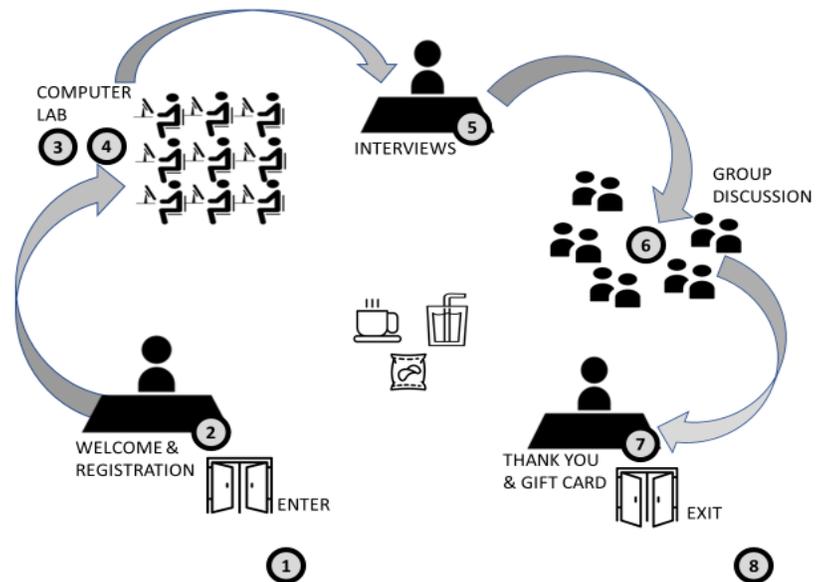
- **PRE-SESSION ONLINE QUESTIONNAIRE** – A week before the session, participants received a short online survey to complete

- **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 <u>you</u> 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?	<input checked="" type="checkbox"/> Poverty <input checked="" type="checkbox"/> Housing <input checked="" type="checkbox"/> Domestic Violence

		<ul style="list-style-type: none"> <li>✓ Access to Affordable Healthcare</li> <li>✓ Mental Health</li> <li>✓ Addictions</li> <li>✓ Lack of Education</li> <li>✓ Lack of Employment</li> <li>✓ Credit Issues</li> <li>✓ Access to Transportation</li> </ul> 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.**

<b>MODERATOR ACTION</b>	<b>MODERATOR QUESTIONS</b>
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 1 <sup>st</sup> Page of Triage	What was your first impression when you entered the site?
The first 3 questions are "screening" questions	"How do you find these questions?" "Is there anything here that is confusing?"
Stop At 4 <sup>th</sup> Page	Is this page: <ul style="list-style-type: none"> <li>a. Easy to understand for you?</li> <li>b. Easy to understand for a client/community member?</li> <li>c. Easy to use for you?</li> <li>d. Easy to use for a client or community member</li> </ul> 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?

## POST SCENARIO GROUP FACILITATION FOCUS (ONSITE)

**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?

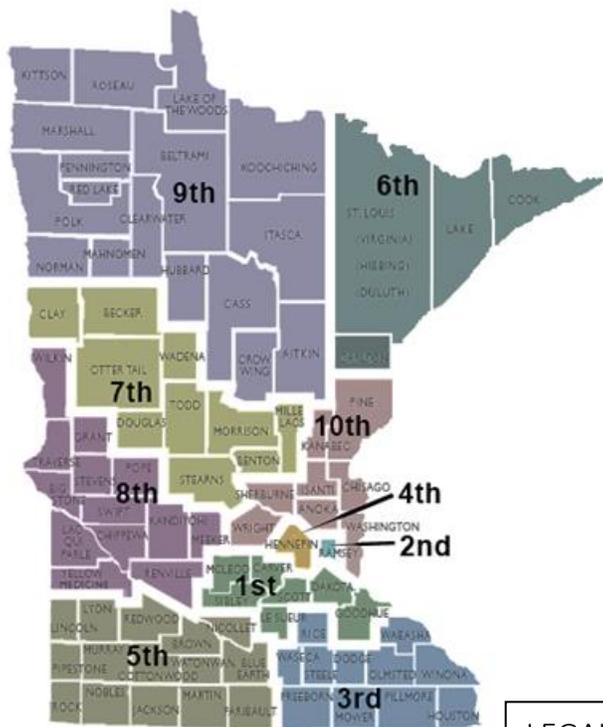
# APPENDIX C: Rural Profile- Bemidji

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)

	14,664	100.0%
<b>Total population</b>		
<b>- Gender and Age</b>		
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%
<b>- Race and Ethnicity</b>		
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		<i>suppressed</i>
Two or More Races	697	4.8%
Hispanic or Latino total	267	1.8%
<b>Foreign Born</b>	379	2.6%
<b>- Language Spoken</b>		
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.”<sup>1</sup> The resulting Trusted Help Report<sup>2</sup> 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<sup>3</sup>

#### 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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<sup>1</sup> <http://www.lawfoundation.on.ca/what-we-do/publications-research-and-evaluations/trusted-intermediaries-research/>

<sup>2</sup> Ibid

<sup>3</sup> Pp. 33-35 [http://www.lawfoundation.on.ca/wp-content/uploads/LFO\\_TrustedHelpReport\\_Part2\\_EN.pdf](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

### Minnesota JFA Trusted Intermediary Feedback Project 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. She provided overall management of the project as well as supervision of interns, volunteers and subcontractors. Melissa 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

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For donating meeting space

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For its student volunteers

### **University of Minnesota Design School**

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- Deb Lawton, Lecturer, User Experience, Digital Arts and Graphic Design

### **Bemidji State University**

For donating faculty expertise/supervision and student volunteers and to

- Sue Rickers, Assistant Professor & Department Chair in Social Work
- Social Work Research Class Members

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- Bridget Gernander, Legal Services Grant Program Manager
- Susan Beaudet, Legal Services Grant Program

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- Ashley Charwood, Northwest Minnesota Regional Coordinator, Minnesota Council on Nonprofits
- Ruth Sherman, Executive Director, Community Resource Connections, Bemidji

- 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