

**Montana Supreme Court
Access to Justice Commission
Large Conference Room, Office of the Court Administrator
301 S. Park, Third Floor, Helena, MT
September 20, 2019 ~ 10:00am -12:00pm**

Agenda

- I. Call to Order and Introductions: Justice Baker (Tab 1)
 - a. Approval of 3/8/19 meeting minutes: Justice Baker (Tab 2)
 - b. Approval of 6/7/19 meeting minutes: Justice Baker (Tab 2)
- II. Montana Legal Services Association update: Alison Paul – 20 minutes
 - a. Justice for all Montanans Program
 - b. DV Working Group
 - c. Rural Incubator Program for Lawyers: Mēghan Scott
- III. Justice Initiatives Committee: Ann Goldes-Sheahan – 20 minutes
- IV. Law Library update: Sarah McClain – 5 minutes
 - a. Self-Help Video Project:
[Montana Courts YouTube channel](#)
 - b. Letters of recognition: Justice Baker (Tab 3)
 - c. Pro Se Case Law Update:
https://courts.mt.gov/Portals/189/cao/ct_services/probono/prosecases.pdf
- V. ATJC Standing Committee Reports
 - a. Self-Represented Litigants: Ann Goldes-Sheahan and Nolan Harris – 10 minutes
 - b. Law School Partnerships: Kelsi Steele – 10 minutes
 - c. Policy and Resources: Abigail St. Lawrence – 10 minutes (Tab 4)
 - i. **Action Item:** Approve Bill Draft
 - d. Communications and Outreach: Melanie Reynolds – 10 minutes
 - e. Strategic Planning: Niki Zupanic and Tara Veazey – 20 minutes (Tab 5)
 - i. **Action Item:** Approve Amendment to Strategic Plan
- VI. Review of Karla M. Gray Equal Justice Award nomination process: Justice Baker – 5 minutes
- VII. Review 2019 and 2020 Meeting Dates
 - a. December 6, 2019
 - b. March 6, 2020
 - c. June 5, 2020
 - d. September 18, 2020 (Joint Meeting with JIC)
 - e. December 4, 2020
- VIII. Public Comment

Tab 1

Montana Access to Justice Commission

MEMBERS

Justice Beth Baker, Chair

Term expires: 30-Sep-2021

Montana Supreme Court Justice

bbaker@mt.gov

406-444-5570

Ed Bartlett

Term expires: 30-Sep-2021

Business/Communications Leader

efbartlett@charter.net

406-431-6014

Georgette Boggio

Term expires: 30-Sep-2022

*Representative of Native American
communities*

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Hon. David A. Carter

Term expires: 30-Sep-2020

Court of Limited Jurisdiction Judge

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406-697-6087 (c)

Rick Cook

Term expires: 30-Sep-2020

Clerk of a District Court

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Rep. Kim Dudik

Term expires: 30-Sep-2020

Montana House of Representatives

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406-239-5771

Sen. Terry Gauthier

Term expires: 30-Sep-2020

Montana Senate

mrmac570@me.com

406-461-0744

Aimee Grmoljez

Term expires: 30-Sep-2020

Business/Communications Leader

agrmoljez@crowleyfleck.com

406-457-2030 (w)

406-459-5958 (c)

Hon. Leslie Halligan

Term expires: 30-Sep-2020

District Court Judge

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Term expires: 30-Sep-2021

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406-243-5291

Hon. John Kutzman

Term expires: 30-Sep-2021

District Court Judge

jkutzman@mt.gov

406-454-6897

Katy Lovell Term expires: 30-Sep-2022	<i>Aging Services Bureau</i>	klovell@mt.gov 406-444-7787
Daniel McLean Term expires: 30-Sep-2022	<i>State Bar of Montana</i>	dan.mclean.esq@gmail.com 406-449-4165
Kyle Nelson Term expires: 30-Sep-2022	<i>Montana Justice Foundation</i>	knelson@goetzlawfirm.com 406-587-0618
Alison Paul Term expires: 30-Sep-2022	<i>Montana Legal Services Association</i>	apaul@mtlsa.org 406-442-9830, Ext. 15
Melanie Reynolds Term expires: 30-Sep-2021	<i>Representative of organizations working with low-income individuals</i>	melanie.reynolds@q.com 406-461-0417
Melissa Schlichting Term expires: 30-Sep-2021	<i>Office of the Attorney General</i>	mschlichting@mt.gov 406-444-3602
Hon. Stacie Smith Term expires: 30-Sep-2019	<i>Montana-Wyoming Tribal Judges Association</i>	ssmith@fortpecktribes.net 406-768-2400

ATJC SUPPORT

Niki Zupanic <i>Montana Justice Foundation</i>	Staff Support nzupanic@mtjustice.org 406-523-3920
Kevin Cook <i>Montana Law Library</i>	IT Support kcook@mt.gov 406-444-9285
Carin McClain <i>Montana Justice Foundation</i>	Staff Support cmclain@mtjustice.org 406-523-3920
Krista Partridge <i>Montana Legal Services Association</i>	Staff Support kpartrid@mtlsa.org

ATJC Standing Committees

COMMUNICATIONS AND OUTREACH

Melanie Reynolds, Chair	melanie.reynolds@q.com
Georgette Boggio	gboggio@elkriverlaw.com
Katy Lovell	klovell@mt.gov
Sarah McClain	smcclain@mt.gov
Daniel McLean	dan.mclean.esq@gmail.com
Emma O'Neil	coneil@mtlsa.org
Melissa Schlichting	mschlichting@mt.gov
Mēghan Scott	mscott@mtlsa.org
Hon. Stacie Smith	ssmith@fortpecktribes.net
Niki Zupanic	nzupanic@mtjustice.org

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Kelsi Steele, Chair	kelsi.steele@mso.umt.edu
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Hillary Wandler	hillary.wandler@umontana.edu

POLICY AND RESOURCES

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Hon. Beth Baker	bbaker@mt.gov
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Sen. Terry Gauthier	mrmac570@me.com
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Alison Paul	apaul@mtlsa.org
Michelle Potts	mpotts@mtlsa.org
Niki Zupanic	nzupanic@mtjustice.org

SELF-REPRESENTED LITIGANTS

Ann Goldes-Sheahan, Co-Chair	agoldes@montanabar.org
Nolan Harris, Co-Chair	nharris2@mt.gov
Abby Brown	abby@mtwaterlaw.com
Rick Cook	rcook@mt.gov
Ed Higgins	ehiggins@mtlsa.org
Hon. John Kutzman	jkutzman@mt.gov
Kay Lynn Lee	kaylynnlee04@yahoo.com
Sarah McClain	smcclain@mt.gov
Hon. Kaylan Minor	kaylan.minor@mt.gov
Kyle Nelson	knelson@goetzlawfirm.com
Staff Support: Carin McClain	cmcclain@mtjustice.org

STRATEGIC PLANNING

Niki Zupanic, Chair	nzupanic@mtjustice.org
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Hon. David Carter	dacarter@co.yellowstone.mt.gov
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Debra Steigerwalt	dsteigerwalt7@gmail.com

Tab 2

Montana Supreme Court Access to Justice Commission
March 8, 2019
Large Conference Room, Office of the Court Administrator
301 S. Park, Third Floor, Helena, MT
10:00 AM – 12:00 PM
Meeting Minutes

Commissioners Present: Justice Beth Baker, Georgette Boggio, Hon. David Carter, Rick Cook, Aimee Grmoljez, Hon. Leslie Halligan, Dean Paul Kirgis, Hon. John Kutzman, Katy Lovell, Dan McLean, Alison Paul, and Melanie Reynolds.

Commissioners Absent: Ed Bartlett, Rep. Kim Dudik, Sen. Terry Gauthier, Kyle Nelson, Melissa Schlichting, and Hon. Stacie Smith.

Others Present: Hannah Cail, Brian Copeland, Patty Fain, Ann Goldes-Sheahan, Nolan Harris, Sarah McClain, John Mudd, Derrek Shepherd, Debbie Steigerwalt, Tara Veazey, Hannah Wilson, and Niki Zupanic.

Call to Order & Introductions

Justice Baker called the meeting to order at 10:00 a.m. Justice Baker asked for corrections on the December meeting minutes. There were no corrections. Alison Paul moved to approve the December minutes and Melanie Reynolds seconded. The minutes were approved without objection.

Legislative Update

Justice Baker provided an update on the 2019 Civil Justice Improvement Act. The House Judiciary Committee heard the bill in late January. Justice Baker said the bill hearing went very well and the witness testimony in support was very compelling, but the committee members would not support the filing fee increases and voted against the bill, 10-9. The legislation is a revenue bill and has a later transmittal deadline, but there still does not appear to be a path forward and the bill is likely dead. Justice Baker said the group working on the bill is regrouping and the Policy & Resources Committee will be meeting on May 13 to discuss next steps after the session. Alison Paul noted that it took seven tries to pass the legislation creating state funding for domestic violence legal services.

Montana Legal Services Association Update

Alison Paul reported on the new federal grants that MLSA was awarded at the end of last year, resulting in MLSA hiring 12 new people. MLSA has restructured its supervision and hired two new directors, who will be starting soon. The other new hires included adding new attorneys and filling positions that had been vacant. Alison shared that MLSA also has a new partnership with the Aging Services Bureau to hire an elder abuse attorney. Alison also reported on several technology projects that MLSA is working on. MLSA is continuing work on a website for crime victim services and expects it to be launched within this year; refreshing the Law Help website to improve search functionality and update content; enhancing the AskKarla online advice platform; and extending rural videoconferencing services with the Court Self-Help Centers. Alison said the

Domestic Violence Working Group had been on a short break while MLSA added new staff, so there is no current update from the group, but it should be meeting again soon.

Rural Incubator Project for Lawyers

Hannah Cail reported that the RIPL program received five applications for its inaugural cohort of Fellows and she shared the backgrounds of the two participants who were selected. The initial “boot camp” CLE is taking place this week, with experienced attorneys serving on panels about ethics, data security, business practices, and other topics. Additional CLE programming will be offered throughout the program and the Fellows will begin providing pro bono hours through MLSA. The program is also connecting the Fellows with mentors and modest means referrals.

Self-Represented Litigants Committee

Nolan Harris reported on the committee’s family law forms project. He thanked the judges and masters who offered their feedback and said the parenting plan and final decree forms are getting ironed out with more plain and user-friendly language. Final drafts will be ready in May and will be shared at the judges’ conference, with a survey also going to all judges. Nolan expects the project will be done in June. He thanked Hannah Wilson, a clerk for Justice Sandefur, and Anisa Ricci, a Justice for Montanans AmeriCorps Service Member serving at the State Law Library Self Help Law Center, for their help with collecting feedback on the forms. Nolan welcomed others to join the form subcommittee’s meetings and calls.

Self Help Video Project

Hannah Wilson and Sarah McClain reported on a new project between the Law Library and the Court Self-Help Centers to create a series of videos to familiarize self-represented litigants with the centers and the legal process. The first videos are now available on [the Court’s YouTube channel](#) and on the Court’s website. They said more videos are to come and welcomed ideas for video topics. They then played one of the videos, which shares best practices for filing documents in Montana district courts.

Strategic Planning Committee

Niki Zupanic provided an update on the grant received from the National Center for State Courts for the “Justice for All Project” to support the Commission’s strategic planning effort and introduced Tara Veazey, the consultant selected to facilitate the project. Tara directed the group to the slide deck at Tab 3 of the meeting packet. Tara shared the progress of the strategic planning committee’s Justice for All work. The committee reviewed the project work plan and reserved nine months of the project for implementation of a handful of items to be determined by the Commission at its June meeting.

Tara reviewed the first phase of the project, which is to conduct an inventory assessment. She reported she was in the process of summarizing the existing research and current data from the courts and MLSA. Tara will be surveying stakeholders and the committee will assess the results and analyze our strengths and challenges in each of the Justice for All assessment components. Tara reviewed those components and shared that more detailed descriptions of each component were in the meeting packet. The committee does not anticipate suggesting significant changes to the Commission’s recently adopted strategic plan, but will be back at the June meeting with the inventory assessment, any suggestions for refining the Commission’s strategic plan priorities, and

work plan options for the implementation phase of the project. Justice Baker said the committee will be meeting again on April 1 and will keep the other committee chairs updated.

2019 Biennial Report of the Montana Access to Justice Commission

Justice Baker shared that the Commission's biennial report to the Montana Supreme Court is due this year. Niki Zupanic will be contacting the committee chairs to collect more information and will draft the report. Justice Baker asked members to watch for an email with the draft report for their review.

Public Comment and 2019 Meeting Dates

Justice Baker asked for public comment. There was no public comment. Justice Baker reviewed the 2019 meeting dates. The meeting was adjourned at 11:07 a.m.

Montana Supreme Court Access to Justice Commission
June 7, 2019
Large Conference Room, Office of the Court Administrator
301 S. Park, Third Floor, Helena, MT
10:00 AM – 12:00 PM
Meeting Minutes

Commissioners Present: Justice Beth Baker, Rep. Kim Dudik (phone), Hon. Leslie Halligan (phone), Katy Lovell, Kyle Nelson (phone), Melanie Reynolds, Melissa Schlichting (phone), and Hon. Stacie Smith (phone).

Commissioners Absent: Ed Bartlett, Georgette Boggio, Hon. David Carter, Rick Cook, Sen. Terry Gauthier, Aimee Grmoljez, Dean Paul Kirgis, Hon. John Kutzman, Dan McLean, and Alison Paul.

Others Present: Brooke Bray, Brian Coplin, Ann Goldes-Sheahan, Nolan Harris, Carin McClain, John Mudd, Emma O'Neil, Krista Partridge, Anisa Ricci, Derrek Shepherd, Kelsey Steele, Tara Veazey, and Niki Zupanic.

Call to Order & Introductions

Justice Baker called the meeting to order at 10:01 a.m. A quorum was not present and so the minutes from the previous meeting were not approved.

Equal Justice Conference Highlights

Anne Goldes-Sheahan reported on the 2019 Equal Justice Conference that she attended in May. The State Pro Bono Coordinators pre-conference meeting included presentations on Pro Bono Marketplaces, which are comparable to classified advertisements for pro bono services, and the Mobile Justice Bus used by Kentucky Legal Aid. She also noted that the National Coalition for Civil Right to Counsel gave a presentation on the growing number of states that require access to counsel for tenants in eviction cases, and for individuals facing termination of their parental rights in step-parent adoption proceedings.

Judge Halligan attended the Access to Justice Commission Chairs Meeting and other court-related sessions at the conference. Topics discussed included the involvement of legal aid organizations in expungements, re-entry courts and job training, non-attorney legal navigators, troubleshooting the pro bono attorney-client relationship, online dispute resolution, and clinics at law schools. Justice Baker commented that the Commission is looking into a number of these initiatives and any conference resources on these topics would be helpful.

Elder Law Training: Legal Services Developer Program

Katy Lovell reported on the Legal Services Developer Program (LSDP) in the State Office on Aging. The program provides elder law training and resources for seniors, family members, and social services staff. They also provide advocacy and advice for seniors on civil legal issues, and limited scope estate-planning document preparation services. Through a subgrant from the Montana Board of Crime Control, LSDP has also placed an Elder Law Attorney at Montana Legal Services to provide advice and direct representation for seniors with civil legal problems arising

from elder abuse and financial exploitation. Katy also reported that LSDP is building a tele-clinic program with video conference equipment at senior centers in frontier locations. The tele-clinics will start with estate planning services and will eventually expand to other civil legal matters. LSDP also provides training on elder abuse issue spotting and reporting for Area Agencies on Aging, the Long Term Care Ombudsman, financial institutions, and health care centers, and recently offered training in Hardin on Indian Wills for lay advocates on the Crow Reservation.

2019 Annual Pro Bono Report

The Annual Pro Bono report is included at Tab 3 of the meeting materials, and Justice Baker highlighted a few statistics from the report. She reminded the group that pro bono service and pro bono reporting are both voluntary in Montana, and added that pro bono reporting has improved since the State Bar has combined it with the required IOLTA reporting. Justice Baker noted that 72% of attorneys reported pro bono hours in 2019, amounting to over 164,000 hours of service, and 74% of attorneys reported a positive pro bono experience.

Self-Represented Litigants Committee

Nolan Harris reported that the committee is working on videos to help people who use pro se forms, and noted that this will be particularly helpful for use in the high-traffic self-help law centers. The videos would also be posted on the MontanaLawHelp website. Nolan added that they are wrapping up edits on the family law pro se forms with Judge McElyea's assistance. The forms were presented at the judge's conference, and Nolan pointed out that this whole process has highlighted the need for judicial involvement and input from the very beginning of forms development.

Policy and Resources Committee

Niki Zupanic gave an update from the Policy and Resources Committee. The committee met in May and the meeting notes are included at Tab 4 of the meeting materials. Niki highlighted the committee's debrief of the 2019 legislative session and the lessons learned for next session. The committee plans to have in-district meetings with legislators- and the public and will work on developing materials and a target list of legislators to visit in preparation for a civil legal aid funding request in 2021. The committee will meet next in July.

Communications and Outreach Committee

Melanie Reynolds reported on the recent activities of the Communications and Outreach Committee. She noted that the primary objective of the committee is to coordinate with and support the Policy and Resources Committee in its effort to educate legislators and the public on the need for funding of civil legal aid. The committee is currently working on a library of educational materials to promote a better understanding of the relationship between civil and non-civil legal needs.

Strategic Planning Committee

Project Consultant- Tara Veazey, and Strategic Planning Committee Chair, Niki Zupanic, presented an update on the Justice for All (JFA) project to support the Commission's strategic planning effort. Tara explained that because the JFA is building on an established foundation of strategic planning and legal needs studies, we were able to save project resources to begin implementation of the plan. Tab 5 of the meeting materials includes the final draft of the inventory

assessment of access to justice efforts in Montana, organized by the four core values adopted by the Commission and including 16 components of access. Surveys were conducted with two groups: Community Stakeholders and the Legal Community. The Community Stakeholder survey achieved a particularly high response rate, with 126 responses from a good cross-section of stakeholders. 83% of stakeholder respondents indicated that their clients have civil legal issues, and even though 77% have referred clients to MLSA, they reported difficulty in knowing if they have enough information to make legal referrals. The survey results were used to inform the final assessment of each of the 16 components. Key takeaways included identification of the following needs: more non-legal and user members on the Access to Justice Commission and its committees; systematic development of pro se and other resources to ensure sustainability; training and education for court staff; and simplification of court processes and rules.

Niki explained that based on the JFA findings, the Strategic Planning Committee has proposed a revision to the Strategic Plan to add an item to create a recruitment and retention plan to focus on involving more non-legal stakeholders and users of the civil justice system on the Commission and committees. Since a quorum of Commissioners was not present to approve the revision, Justice Baker said this action item would be added to the agenda for the next meeting.

Finally, implementation activities have been prioritized to use grant funding and Tara Veazey's time most effectively. The top implementation priority is research and recommendations on streamlining and simplifying court procedures, rules and processes in courts with the highest volumes of self-represented litigants. Tara will also lead the planning process for each committee to systematize their priorities. Justice Baker thanked Tara and the committee for their work on the assessment and the great progress that allowed the implementation tasks to begin. She asked the group if there were any comments or concerns on the implementation priorities, and none were raised.

2019 Biennial Report

Justice Baker directed the group to Tab 6 of the meeting materials for the required Biennial Report of the Access to Justice Commission to the Montana Supreme Court. There were no comments or objections to the report from the Commission members in attendance. Since a quorum of Commissioners was not present to approve the report, Justice Baker said that an email vote would be taken following the meeting.

Karla M. Gray Equal Justice Award Nominations

Justice Baker reminded the group that the nomination deadline for the Karla M. Gray Award is June 17, and that the Justice Initiatives Committee will screen nominations before sending them to the Commission for a final vote. Nominations are valid for three years and the 2019 awardee will need to be selected by the end of July.

Legal Services Corporation (LSC) Budget Update

Justice Baker reported that she sent a letter to the LSC Board in support of continued funding for civil legal aid, and noted that the House budget currently includes an increase in funding for LSC.

Public Comment and 2019 Meeting Dates

Justice Baker asked for public comment. There was no public comment. Justice Baker reviewed upcoming meeting dates and noted that the next meeting date has been changed to September 20 due to a conflict with the State Bar Annual Meeting. The meeting was adjourned at 11:27 a.m.

Tab 3



Supreme Court of Montana

Access to Justice Commission

August 28, 2019

Anisa Ricci

Re: Form Video Development for Montana Courts

Dear Anisa:

On behalf of the Montana Supreme Court's Access to Justice Commission, I write to express my sincere appreciation for your hard work creating self-help videos to help Montanans fill out legal forms and navigate court processes. These videos will be a valuable tool for self-represented litigants and an educational resource for future AmeriCorps serving in the Justice For Montanans program. Not only that, they will help the courts by giving instructions and information that often take judges' time in the courtroom.

You are leaving a legacy in Montana, as your work on this project advances the Commission's mission to increase the availability of online resources for the public. Thank you for being part of the solution to help close the gaps in the Montana justice system. Your dedication to helping people get their day in court is greatly appreciated and speaks volumes about your character and values.

On the Commission's behalf, I wish you the best of luck in your future endeavors, knowing you will carry with you the values of a dedicated public servant.

Sincerely,

A handwritten signature in blue ink, appearing to read "Beth Baker", is written over the typed name.

Beth Baker
Supreme Court Justice
Chair, Access to Justice Commission



Supreme Court of Montana

Access to Justice Commission

August 28, 2019

Hannah Wilson

Re: Form Video Development for Montana Courts


Dear Hannah:

On behalf of the Montana Supreme Court's Access to Justice Commission, I write to express my sincere appreciation for your hard work creating self-help videos to help Montanans fill out legal forms and navigate court processes. These videos will be a valuable tool for self-represented litigants and an educational resource for future AmeriCorps serving in the Justice For Montanans program. Not only that, they will help the courts by giving instructions and information that often take judges' time in the courtroom.

You are leaving a legacy in Montana, as your work on this project advances the Commission's mission to increase the availability of online resources for the public. Thank you for being part of the solution to help close the gaps in the Montana justice system. Your dedication to helping people get their day in court is greatly appreciated and speaks volumes about your character and values.

On the Commission's behalf, I wish you the best of luck in your future endeavors, knowing you will carry with you the values of a dedicated public servant.

Sincerely,


Beth Baker
Supreme Court Justice
Chair, Access to Justice Commission



Supreme Court of Montana

Access to Justice Commission

August 28, 2019

Michael Turpie

Re: Form Video Development for Montana Courts


Dear Michael:

On behalf of the Montana Supreme Court's Access to Justice Commission, I write to express my sincere appreciation for your hard work creating self-help videos to help Montanans fill out legal forms and navigate court processes. These videos will be a valuable tool for self-represented litigants and an educational resource for future AmeriCorps serving in the Justice For Montanans program. Not only that, they will help the courts by giving instructions and information that often take judges' time in the courtroom.

You are leaving a legacy in Montana, as your work on this project advances the Commission's mission to increase the availability of online resources for the public. Thank you for being part of the solution to help close the gaps in the Montana justice system. Your dedication to helping people get their day in court is greatly appreciated and speaks volumes about your character and values.

On the Commission's behalf, I wish you the best of luck in your future endeavors, knowing you will carry with you the values of a dedicated public servant.

Sincerely,


Beth Baker
Supreme Court Justice
Chair, Access to Justice Commission

Tab 4

**** Bill No. ****

Introduced By *****

By Request of the *****

A Bill for an Act entitled: "An Act creating the Civil Justice Improvements Act of 2021; creating the Civil Justice Improvements Grant Program to be administered by the Supreme Court Administrator; increasing fees for certain filings in district court; creating an account and allocating a portion of the filing fees to the account; amending sections 3-1-702, 25-1-201, 25-9-506, and 44-7-202, MCA; providing an effective date; and providing a termination date."

Be it enacted by the Legislature of the State of Montana:

NEW SECTION. **Section 1. Civil justice improvements account.**

(1) There is a civil justice improvements account in the state special revenue fund established in 17-2-102(1)(b)(i). The revenue in the account must be used solely to provide funding to improve the administration of civil legal matters as provided in [section 2]. Programs funded by the account are intended to improve court efficiency, reduce delays, provide legal information and assistance to persons of limited means, and help all court users save time and money by resolving their disputes more quickly.

(2) There must be paid into the account money collected pursuant to 25-1-201(5), (6), and (7), and 25-9-506(1).

(3) Money deposited in the account is subject to appropriation by the legislature and may be used only by the supreme court administrator to provide civil justice improvement grants pursuant to [section 2].

NEW SECTION. **Section 2. Civil justice improvements grant program.**

(1) There is a civil justice improvements grant program administered by the supreme court administrator.

(2) Alternative dispute resolution programs connected with a district court or court of limited jurisdiction, legal aid clinics affiliated with an accredited Montana law school that assist persons of limited means with civil legal matters, and tax-exempt organizations are eligible to receive grant funds from the program. An eligible tax-exempt organization must be a 501(c)(3) non-profit organization in operation for at least one year that ordinarily renders or finances legal services to persons of limited means in civil matters or has a primary focus of coordinating volunteer or reduced-fee legal services to provide attorney representation to Montanans of limited means. Funds awarded from the program may be used only for the purposes set forth in this section.

(3) The supreme court administrator shall establish criteria and procedures for the distribution and accountability of money in the account. The court administrator shall award grant funds within the amount appropriated by the legislature to programs that serve domestic violence survivors; programs that provide alternative

dispute resolution for high-volume self-representation cases such as family law and landlord-tenant matters; programs that facilitate the ability of Montanans of limited means to receive volunteer or reduced-fee legal services; programs that serve persons with demographic barriers or in locations that lack access to legal services; programs in communities that serve Native American populations; programs that reach broadly across the entire state, including through technological innovations; and development of civil legal forms and instructional materials explaining court rules and processes that can be used by people representing themselves.

(4) An applicant for a grant of funds from the account must include in the grant application a detailed plan for how the applicant will use the funds for one or more of the purposes of this section and for how the applicant will collect and report data, account for the funds received, and measure progress on performance goals.

(5) Money disbursed from the account cannot be used to bring a suit against the State of Montana or other governmental entity, unless the suit is brought to enforce an individual's right to access governmental benefits or services provided under a statute or regulation, including but not limited to social security, medicare, medicaid, and housing benefits; to acquire land or buildings; to provide legal advice or representation on criminal matters; to support lobbying, as defined by § 5-7-102(11), MCA; or to pay attorneys employed in for-profit law firms.

Section 3. Section 3-1-702 , MCA, is amended to read:

"3-1-702. Duties. The court administrator is the administrative officer of the court. Under the direction of the supreme court, the court administrator shall:

(1) prepare and present judicial budget requests to the legislature, including the costs of the state-funded district court program;

(2) collect, compile, and report statistical and other data relating to the business transacted by the courts and provide the information to the legislature on request;

(3) to the extent possible, provide that current and future information technology applications are coordinated and compatible with the standards and goals of the executive branch as expressed in the state strategic information technology plan provided for in 2-17-521;

(4) recommend to the supreme court improvements in the judiciary;

(5) administer legal assistance for indigent victims of domestic violence, as provided in 3-2-714;

(6) administer the civil justice improvements grant program, as provided in [section 2];

~~(6)~~(7) administer state funding for district courts, as provided in chapter 5, part 9;

~~(7)~~(8) administer and report on the child abuse and neglect court diversion pilot project provided in 41-3-305;

~~(8)~~(9) administer the pretrial program provided for in 3-1-708;

~~(9)~~(10) administer the judicial branch personnel plan; and
~~(10)~~(11) perform other duties that the supreme court may assign.
|(Subsection ~~(7)~~8) terminates June 30, 2019 -- secs. 5, 7, Ch. 141, L.
2017.)|"

{Internal References to 3-1-702: None.}

Section 4. Section 25-1-201 , MCA, is amended to read:

"25-1-201. Fees of clerk of district court. (1) The clerk of district court shall collect the following fees:

(a) at the commencement of each action or proceeding, except a petition for dissolution of marriage, from the plaintiff or petitioner, ~~\$90~~ \$150; for filing a complaint in intervention, from the intervenor, ~~\$80~~ \$150; for filing a petition for dissolution of marriage, \$170; for filing a petition for legal separation, \$150; and for filing a petition for a contested amendment of a final parenting plan, \$120;

(b) from each defendant or respondent, on appearance, ~~\$60~~ \$75;

(c) on the entry of judgment, from the prevailing party, \$45;

(d) (i) except as provided in subsection (1)(d)(ii), for preparing copies of papers on file in the clerk's office in all criminal and civil proceedings, \$1 a page for the first 10 pages of each file, for each request, and 50 cents for each additional page;

(ii) for a copy of a marriage license, \$5, and for a copy of a dissolution decree, \$10;

(iii) for providing copies of papers on file in the clerk's office by facsimile, e-mail, or other electronic means in all criminal and civil proceedings, 25 cents per page;

- (e) for each certificate, with seal, \$2;
- (f) for oath and jurat, with seal, \$1;
- (g) for a search of court records, \$2 for each name for each year searched, for a period of up to 7 years, and an additional \$1 for each name for any additional year searched;
- (h) for filing and docketing a transcript of judgment or transcript of the docket from all other courts, the fee for entry of judgment provided for in subsection (1)(c);
- (i) for issuing an execution or order of sale on a foreclosure of a lien, \$5;
- (j) for transmission of records or files or transfer of a case to another court, \$5;
- (k) for filing and entering papers received by transfer from other courts, \$10;
- (l) for issuing a marriage license, \$53;
- (m) on the filing of an application for informal, formal, or supervised probate or for the appointment of a personal representative or the filing of a petition for the appointment of a guardian or conservator, from the applicant or petitioner, \$70, which includes the fee for filing a will for probate;
- (n) on the filing of the items required in 72-4-303 by a domiciliary foreign personal representative of the estate of a nonresident decedent, \$55;
- (o) for filing a declaration of marriage without solemnization, \$53;
- (p) for filing a motion for substitution of a judge, \$100;

(q) for filing a petition for adoption, \$75;

(r) for filing a pleading by facsimile or e-mail in all criminal and civil proceedings, 50 cents per page.

(2) Except as provided in subsections (3) and (5) through (7), fees collected by the clerk of district court must be deposited in the state general fund as specified by the supreme court administrator.

(3) (a) Of the fee for filing a petition for dissolution of marriage, \$5 must be deposited in the children's trust fund account established in 52-7-102, \$19 must be deposited in the civil legal assistance for indigent victims of domestic violence account established in 3-2-714, and \$30 must be deposited in the partner and family member assault intervention and treatment fund established in 40-15-110.

(b) Of the fee for filing a petition for legal separation, \$5 must be deposited in the children's trust fund account established in 52-7-102 and \$30 must be deposited in the partner and family member assault intervention and treatment fund established in 40-15-110.

(4) If the moving party files a statement signed by the nonmoving party agreeing not to contest an amendment of a final parenting plan at the time the petition for amendment is filed, the clerk of district court may not collect from the moving party the fee for filing a petition for a contested amendment of a parenting plan under subsection (1) (a).

(5) Of the fee for filing an action or proceeding, except a petition for dissolution of marriage, \$9 must be deposited in the

civil legal assistance for indigent victims of domestic violence account established in 3-2-714 and \$60 must be deposited in the state special revenue account established in [section 1].

(6) Of the fee for filing a complaint in intervention, \$70 must be deposited in the state special revenue account established in [section 1].

(7) Of the fee collected on appearance from each defendant or respondent, \$15 must be deposited in the state special revenue account established in [section 1].

~~(6)~~ (8) The fees collected under subsections (1)(d), (1)(g), (1)(j), and (1)(r) must be deposited in the county district court fund. If a district court fund does not exist, the fees must be deposited in the county general fund to be used for district court operations.

~~(7)~~ (9) Of the fee for issuance of a marriage license and the fee for filing a declaration of marriage without solemnization, \$13 must be deposited in the domestic violence intervention account established by 44-7-202 and \$10 must be deposited in the county district court fund. If a district court fund does not exist, the fees must be deposited in the county general fund to be used for district court operations.

~~(8)~~ (10) Any filing fees, fines, penalties, or awards collected by the district court or district court clerk not otherwise specifically allocated must be deposited in the state general fund."

{ Internal References to 25-1-201:

3-1-804	3-1-804	3-1-804	3-1-804
3-1-804	3-2-714	7-4-2516	15-1-121
15-1-121	25-10-404	25-10-405	25-10-405

25-30a-2210 27-32-104 27-32-104 44-7-202}

Section 5. Section 25-9-506 , MCA, is amended to read:

"25-9-506. Fees. (1) Except as provided for in subsection (2), a person filing a foreign judgment shall pay to the clerk of court a fee of ~~\$60~~ 122, of which \$62 must be deposited in the state special revenue account established in [section 1].

(2) Fees for docketing, transcription, or other enforcement proceedings must be as provided for judgments of the district court.

(3) Fees collected by the clerk of district court not otherwise specially allocated must be forwarded to the department of revenue for deposit in the state general fund."

{ Internal References to 25-9-506:

15-1-121}

Section 6. Section 44-7-202 , MCA, is amended to read:

"44-7-202. Domestic violence intervention account -- administration by board of crime control. (1) There is a domestic violence intervention account in the state special revenue fund in the state treasury. There must be paid into this account the designated filing fees paid under 25-1-201~~(7)~~(9) to the clerk of the district court. The money deposited in the account must be used for services provided under 44-7-201.

(2) Funds deposited in the account may be expended by the Montana board of crime control, as provided for in 2-15-2306, to fund

services and activities under and payment of administrative costs of the domestic violence intervention program provided for in 44-7-201."

{ *Internal References to 44-7-202:*

25-1-201 44-4-310 44-7-201 44-7-201 *

44-7-203}

NEW SECTION. **Section 7. Reporting.** The supreme court administrator shall submit a report to the law and justice interim committee on or before September 30, 2025, documenting the amount of revenue deposited in the state special revenue account established in [section 1], the amount of funds distributed pursuant to [section 1], and the programs or nonprofit organizations to which funds were distributed. The report shall include a summary of the legal services provided to persons of limited means by organizations receiving funds under [section 2], a summary of outcome measures, and information concerning the impact, if any, on court efficiencies and caseloads.

NEW SECTION. **Section 8. {standard} Codification instruction.** [Sections 1, 2 and 7] are intended to be codified as an integral part of Title 3, chapter 2, part 7, and the provisions of Title 3, chapter 2, part 7, apply to [sections 1, 2 and 7].

NEW SECTION. **Section 9. {standard} Effective date.** [This act] is effective July 1, 2021.

ATJC Draft Copy

As of: September 9, 2019 (4:25PM)

LCXXXX

NEW SECTION. **Section 10. {standard} Termination.** [This act]
terminates June 30, 2027.

- END -

Tab 5

Montana Access to Justice Commission

Strategic Plan

2019-2020

adopted 12/7/18

PROPOSED REVISION ON PAGE 11

Statement of Purpose

The purpose of the Montana Access to Justice Commission is to develop, coordinate, and implement initiatives to expand access to and enhance the quality of justice in civil legal matters.

Core Values

As members of the Montana Access to Justice Commission, we believe:

Access

- Access to justice depends on the availability of affordable legal information and services, including assistance and representation when needed.
- Barriers to access to justice must be prevented, removed, or reduced.
- Court users should have access to justice through full participation in the judicial process, regardless of their socio-economic status, English language proficiency, cultural background, legal representation status, or other circumstances.

Coordination

- A coordinated and comprehensive statewide system for delivering legal services must be maintained.
- The justice system must collaborate with other persons, professions, and organizations to meet the legal and law-related needs of the public.

Education

- Public legal education must be provided to create and sustain an informed and empowered public and to build broad support for access to justice.
- Public awareness of the importance of civil legal services is needed to expand justice.

Resource Development

- Access to justice requires adequate funding, resources, and support.
- Adequate and sustained public and private funding, resources, and support must be provided to assure access to justice for low-and moderate income and other vulnerable persons.

Access

Objective Statement	Strategies and Activities	Strategy Leader <i>And Partners</i>
Develop and advocate for adequate support and resources for people to have their legal issues fully resolved in a fair, timely, and appropriate manner	<p>1. Create a mechanism for the ongoing development, review, and updating of standardized, plain-language forms and instructions for use by self-represented litigants</p>	<p>Self-Represented Litigants Committee</p> <p><i>Court Help Program</i></p> <p><i>Montana Legal Services Association</i></p>
	<p>2. Develop and maintain mechanisms for linking Montanans who have legal problems with the programs, attorneys, and service providers who may be able to assist with their particular issues in their community</p> <p><i>(see also under Coordination)</i></p>	<p>Self-Represented Litigants Committee</p> <p><i>Education and Outreach Committee</i></p> <p><i>Montana Legal Services Association,</i></p>

		<i>Justice for Montanans</i> <i>AmeriCorps Program</i> <i>Court Help Program</i> <i>State Pro Bono Program</i> <i>State Bar of Montana</i> <i>Justice Initiatives Committee</i>
	3. Create a statewide inventory of the resources, materials, and support available to self-represented litigants and develop a mechanism for updating the inventory on a regular basis	Self-Represented Litigants Committee <i>Court Help Program</i>
	4. Research and make recommendations to streamline and simplify court procedures, rules, and processes in areas of law with a high volume of self-represented litigants	Policy and Resources Committee

	5. Evaluate and recommend policies to enable remote access to the court system, allowing litigants, legal aid, and pro bono attorneys greater access to the court system	Self-Represented Litigants Committee <i>Law School Partnerships Committee</i> <i>Office of Court Administrator</i>
	6. Identify and address gaps in existing training materials for judges, clerks of court, and court staff, update existing materials, and develop new materials as needed	Self-Represented Litigants Committee <i>Office of Court Administrator</i> <i>State Law Library</i> <i>State Pro Bono Program</i>

	7. Develop new strategies for disseminating training materials with judges, clerks of court, and court staff, and provide new opportunities to engage judges, clerks of court, and court staff about access to justice issues	Self-Represented Litigants Committee <i>Office of Court Administrator</i> <i>State Pro Bono Program</i> <i>State Law Library</i>
	8. Monitor and support the Court Help Program to provide services to pro se litigants across the state	Self-Represented Litigants Committee
	9. Support and promote pro bono attorneys providing services to low-income Montanans	State Pro Bono Program <i>Montana Legal Services Association</i> <i>State Bar of Montana</i> <i>Justice Initiatives Committee</i>

		<i>Alexander Blewett III School of Law</i>
	10. Foster models for mediation and other alternative dispute resolution services programs	State Pro Bono Program <i>Montana Legal Services Association</i> <i>Justice Initiatives Committee</i> <i>Alexander Blewett III School of Law</i>
	11. Encourage attorneys to provide limited scope representation through model materials, training, and a referral system	State Bar of Montana Justice Initiatives Committee <i>Montana Legal Services Association</i> <i>State Pro Bono Program</i>

	12. Increase judicial understanding and support of limited scope representation	Self-Represented Litigants Committee
	13. Promote and support statewide implementation and utilization of the State Bar of Montana's modest means program	State Bar of Montana <i>Justice Initiatives Committee</i> <i>State Pro Bono Program</i> <i>Montana Legal Services Association</i>
	14. Revisit the gaps and barriers study and recommend strategies for legal aid providers, courts, and other entities to adopt in response	Self-Represented Litigants Committee <i>State Pro Bono Program</i> <i>Montana Legal Services Association</i> <i>Justice Initiatives Committee</i>

Coordination

Objective Statement	Strategies and Activities	Strategy Leader
<p>Coordinate legal assistance providers, the law school, the bar, and other entities to foster an effective and efficient statewide, integrated civil legal services delivery system that addresses the relationships between civil legal needs and non-legal issues</p>	<p>1. Support innovative programs among other stakeholders, such as incubator programs and expanding statewide pro bono and limited scope opportunities for law students</p>	<p>Law School Partnerships Committee</p> <p><i>State Pro Bono Program</i></p> <p><i>Montana Legal Services Association</i></p> <p><i>State Bar of Montana</i></p> <p><i>Justice Initiatives Committee</i></p> <p><i>Alexander Blewett III School of Law</i></p>

	<p>2. Develop and maintain mechanisms for linking Montanans who have legal problems with the programs, attorneys, and service providers who may be able to assist with their particular issues in their community</p> <p><i>(see also under Access)</i></p>	<p>Self-Represented Litigants Committee</p> <p><i>Education and Outreach Committee</i></p> <p><i>Montana Legal Services Association, Justice for Montanans AmeriCorps Program</i></p> <p><i>Court Help Program</i></p> <p><i>State Law Library</i></p> <p><i>State Pro Bono Program</i></p> <p><i>State Bar of Montana</i></p> <p><i>Justice Initiatives Committee</i></p> <p><i>Alexander Blewett III School of Law</i></p>
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	3. Facilitate partnerships with and among agencies and organizations to address the relationships between civil legal needs and non-legal needs	Education and Outreach Committee Policy and Resources Committee
	4. Coordinate with local bar associations and the State Bar Justice Initiatives Committee on recruitment and recognition of pro bono attorneys	State Bar of Montana Justice Initiatives Committee <i>State Pro Bono Program</i>
	5. Create a recruitment and retention plan for the Commission and committees to ensure continuity and strong leadership and to focus on involving more non-legal stakeholders, including users of the civil justice system	Strategic Planning Committee

Education

Objective Statement	Strategies and Activities	Strategy Leader
<p>Increase support for improving access to justice, recognizing the value of a strong, adequately-funded civil legal services delivery system, and addressing the relationships between civil legal needs and non-legal issues</p>	<p>1. Create a library of educational materials promoting access to justice programs, with up-to-date and relevant statistics and information, and develop a mechanism for regularly updating and disseminating those materials on a variety of platforms</p>	<p>Education and Outreach Committee</p> <p><i>Office of Court Administrator</i></p> <p><i>State Law Library</i></p>
	<p>2. Develop and seek publication of news articles, opinion-editorials, and informational pieces on the importance and economic impact of legal aid, pro bono service, and access to justice</p>	<p>Education and Outreach Committee</p> <p><i>Montana Legal Services Association</i></p> <p><i>State Bar of Montana</i></p>

		<i>Montana Justice Foundation</i> <i>State Law Library</i>
	3. Promote better understanding of the relationships between civil legal needs and non-legal needs	Education and Outreach Committee
	4. Expand upon the Court Help Program legislative audit findings to show the importance of civil legal assistance to court efficiency	Education and Outreach Committee <i>Office of Court Administrator</i> <i>State Law Library</i>

Resource Development

Objective Statement	Strategies and Activities	Strategy Leader
Resource Development: Secure adequate, sustainable funding to create and maintain an effective continuum of services for resolving civil legal problems, both in and out of court, and to increase the capacity and infrastructure available to support those services	1. Advocate to the legislature for civil legal aid funding	Policy and Resources Committee
	2. Seek grant funding for Commission activities and staff and collaborate with other stakeholders to secure funding for joint projects	Policy and Resources Committee <i>Montana Justice Foundation</i> <i>Montana Legal Services Association</i> <i>Office of Court Administrator</i>

	3. Advocate for support from the Montana congressional delegation for funding for Legal Services Corporation and other access to justice programs	Policy and Resources Committee <i>State Bar of Montana</i>
	4. Examine the potential for increasing <i>pro hac vice</i> fees and dedicating the proceeds to legal aid providers	Policy and Resources Committee <i>State Bar of Montana</i>
	5. Increase <i>cy pres</i> awards to access to justice organizations	Policy and Resources Committee <i>Montana Justice Foundation</i> <i>Montana Legal Services Association</i> <i>State Bar of Montana</i>

State Bar of Montana Justice Initiatives Committee 2019-2020 Strategic Plan

Statement of Purpose

The State Bar of Montana Justice Initiative Committee works to increase access to civil legal services by recruiting pro bono volunteers, providing education and training, identifying and removing barriers to legal services, conducting research and policy analysis, and coordinating with and supporting other entities.

Objectives and Strategies

- (1) Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services.
 - i. Develop and execute a marketing campaign to promote pro bono, modest means, and limited scope services
 - ii. Increase law student participation in pro bono opportunities
 - iii. Hold more CLEs and repeat the public employee CLE
 - iv. Identify existing pro bono opportunities, promote them through SBM channels, and funnel students and attorneys to them
 - v. Engage new attorneys in pro bono, modest means, and limited scope services
- (2) Expand access to civil legal services through coordination with the Access to Justice Commission, the judiciary, the State Bar of Montana and local bar associations, and other entities.
 - i. Meet with our partners, share our plan, and coordinate our work
- (3) Develop mechanisms for ongoing review and reporting of progress on JIC's objectives.

Other Areas of Work

- (1) Develop and maintain mechanisms for linking Montanans who have legal problems with the programs, attorneys, and service providers who may be able to assist with their particular issues in their community
- (2) Recruit, train, support and promote pro bono attorneys providing services to low-income Montanans
- (3) Foster models for mediation and other alternative dispute resolution services programs
- (4) Encourage attorneys to provide limited scope representation through model materials, training, and a referral system
- (5) Promote and support statewide implementation and utilization of the State Bar of Montana's modest means program
- (6) Research and recommend policy changes and strategies for removing barriers to pro bono, modest means, and limited scope services
- (7) Support innovative programs among other stakeholders, such as incubator programs and expanding statewide pro bono and limited scope opportunities for law students
- (8) Coordinate with local bar associations, the Access to Justice Commission, and other entities on recruitment and recognition of pro bono attorneys

Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services		
Strategy	Strategy Leaders <i>And Partners</i>	Activities
Develop and execute a marketing campaign to promote pro bono, modest means, and limited scope services	Ann Goldes-Sheahan and John Mudd <i>State Bar Executive Committee and Board of Trustees</i> <i>State Bar Communications Director Joe Menden</i> <i>JIC members</i> <i>Pro bono volunteers</i>	Convene a working group to develop a detailed plan and timeline: <ul style="list-style-type: none"> • Develop a global message (ex: "Why Pro Bono?") or something positive • Push the overall message through the bar as the platform with Montana Lawyer, Facebook page, annual meeting, other messaging, maybe video, website (connecting with other websites like courts webpage and MLSA)
		Develop a metric and evaluation system for comparing whether pro bono participation increases
		Research other states' and organizations' marketing plans and messaging

<p>Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services</p>		
Strategy	Strategy Leaders <i>And Partners</i>	Activities
<p>Increase law student participation in pro bono opportunities</p>	<p>Lindsay Lorang and Lindsey Simon</p>	<p>Set up a meeting with the law school's pro bono coordinator</p>
		<p>Identify areas of practice for optimal law student participation</p>
		<p>Research law student practice rules for administrative advocacy</p>

Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services

Strategy	Strategy Leaders <i>And Partners</i>	Activities
Hold more CLEs and repeat the public employee CLE	<p>Stuart Segrest, Jim Shea, and Patty Fain</p> <p><i>Justice Initiatives Committee government/public interest lawyer subcommittee</i></p> <p><i>Access to Justice Commission</i></p> <p><i>State Bar of Montana CLE Committee</i></p> <p><i>State Bar of Montana Public Interest section</i></p> <p><i>Local pro bono committees</i></p> <p><i>State of Montana legal department directors/chief legal counsel</i></p> <p><i>MLSA</i></p>	<p>Pro Bono specific CLEs</p> <ol style="list-style-type: none"> Conduct research (per Statement of Purpose) to identify topics of interest and unmet legal needs, including the annual pro bono report, information from other committees and working groups, and existing legal needs surveys. Create list of CLE or workshop topics, and the number to offer Choose dates and get on State Bar CLE calendar Identify speakers that are experts or have experience in subject matter Apply for credits, advertise and launch
		<p>State agencies and department pro bono roundtable discussion</p> <ol style="list-style-type: none"> Identify representatives from state agencies/departments for pro bono contact Create a state agency/department specific pro bono agenda Organize and facilitate meeting prior to second CLE Summarize meeting results to share with JIC
		<p>Second public interest/government attorney CLE</p>

		<ul style="list-style-type: none"> i. Determine when and get on State Bar CLE calendar ii. Determine focus and format iii. Incorporate results from the roundtable discussion (see B above.) iv. Identify expert and guest speakers v. Apply for credits, advertise and launch
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Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services

Strategy	Strategy Leaders <i>And Partners</i>	Activities
Identify existing pro bono opportunities, promote them through SBM channels, and funnel students and attorneys to them	Angie Wagenhals, Ann Goldes-Sheahan, and Patty Fain	Review the pro bono inventory annually for updated information, project partners, etc.
		Make sure interested parties know about opportunities, make sure JIC is aware of opportunities, keeps them in mind
		Add agenda item to JIC meetings on a semi-regular basis to update committee members on programs and make sure list is complete, questions answered, etc.
		Develop list of who should get materials (i.e. swearing ins); develop materials to share, and assign who can distribute materials

Increase the provision of civil legal services by developing and promoting programs to recruit, train, and support pro bono attorneys, and removing barriers to providing pro bono, modest means, and limited scope legal services

Strategy	Strategy Leaders <i>And Partners</i>	Activities
Engage new attorneys in pro bono, modest means, and limited scope services	Bill Bronson and Kay Lynn Lee <i>Judge's Association</i>	Encourage law firms to implement a "pro bono"/modest-means, etc., mind-set in their firms, with special emphasis on new associates
	<i>Access to Justice Commission</i> <i>State Bar of Montana</i> <i>Local Bar Associations</i>	Encourage local bar associations and the district judges to encourage the mind-set, and appropriate local programming to re-enforce this (eg., recent Cascade County Bar Association CLE addressing importance of pro bono)
	<i>Targeted law firms in various communities</i>	Encourage the law school to inculcate this value system in students on a continuing basis throughout the students' education
		Develop a metric which "defines" and then "measures" success

Expand access to civil legal services through coordination with the Access to Justice Commission, the Judiciary, the State Bar of Montana and local bar associations, and other entities

Strategy	Strategy Leaders <i>And Partners</i>	Activities
Meet with our partners, share our plan, and coordinate our work	Angie Wagenhals and Niki Zupanic	Set a regular annual meeting with ATJC and calendar prep work leading up to that meeting
	<i>Angie for MLSA</i> <i>Stuart and Ann for SBM</i>	Identify a JIC liaison to ATJC – someone who will attend quarterly ATJC meetings, speak on behalf of JIC, and report between the two entities
	<i>Justice Shea for MTSC</i> <i>Patty for OCA</i> <i>Lindsay or Lindsey for the law school (with new pro bono coordinator Kelsi Steele)</i> <i>Niki and Ann for ATJC</i> <i>Bill for CCLC and Pam Poon and others involved with local bar efforts</i> <i>Hilary Wandler for Veterans Clinic</i>	Finish the JIC strategic plan and circulate to project partners: <ul style="list-style-type: none"> • State Bar of Montana Board of Trustees, sections, and local bar associations • Attorney associations (MTLA, etc.) • ATJC • MLSA • Montana Supreme Court, Office of Court Administrator • State agencies (eg., Legal Services Developer) • Other legal providers
		Ask those partners for input, feedback, and assistance with our action items
		Consider designating a State Bar of Montana liaison or creating more frequent updates to or more interaction with the Board of Trustees

SRL STANDING COMMITTEE UPDATE

1. FORMS SUBCOMMITTEE

Family law forms have been the focus for the last three months. Next meeting is 10/2.

A. Parenting Plan

- i. Attachments for multiple schedules, holiday schedules, limited parenting time, and medical support orders have been rolled into the main parenting plan document.
- ii. Plain-language changes have been proposed to simplify the notice requirement for any Notice of Intent to Move.

B. Property Distribution

- i. More space allotted for information (vehicles, assets, etc.)
- ii. Option for mortgage refinancing date proposed. This has been proposed after several litigants across Montana have been reported to have post-decree issues with opposing party not paying on home awarded to them.

C. Dissolution Decree

- i. Decrees have been reformatted with “Findings and Facts” and “Decree” areas.
- ii. Child support and medical support language has been added into decrees.

D. Affidavit for Entry of Dissolution Decree without Hearing

- i. Reformatted for two-person use. Both parties would be able to sign document to waive hearing.

2. EDUCATION AND OUTREACH SUBCOMMITTEE

Brochures/written resources are being shopped out to different working groups. Rick Cook and I are working on a Court Staff training focused on pro se litigants.

Court Staff Training:

The purpose of this training is to inform clerks of court, and other court staff, about the realities for the pro se population they are assisting every day. The impetus for the training came from a number of complaints reported by self help law centers. It focuses on trauma-informed research and research into the biases of court staff. We want to increase the understanding of these realities so the customer service towards pro se litigants can improve. With better treatment and improved customer service, we hope to increase the receptiveness and legitimacy of court orders (reducing boomerang effect in parenting plans, etc.B).