

# Remote Legal Support:

A Guide for Nonprofit and  
Pro Bono Innovation

# Table of Contents

|   |    |
|---|----|
| <b>Executive Summary</b> .....                          | 3  |
| <b>Introduction</b> .....                               | 4  |
| <b>Chapter 1: Survey Results</b> .....                  | 5  |
| <b>Chapter 2: Tech Tools</b> .....                      | 11 |
| <b>Chapter 3: Service Delivery Models</b> .....         | 16 |
| Asian Americans Advancing Justice - Los Angeles.....    | 16 |
| Colorado Legal Services.....                            | 19 |
| Dilley Pro Bono Project.....                            | 21 |
| Family Offense Petition Program.....                    | 23 |
| Gay Mens' Health Crisis.....                            | 25 |
| International Rescue Committee.....                     | 27 |
| Legal Information for Families Today.....               | 30 |
| Montana Court Help.....                                 | 32 |
| Montana Health Justice Partnership.....                 | 33 |
| <b>Chapter 4: Working with the Community</b> .....      | 35 |
| <b>Chapter 5: Working with Volunteers</b> .....         | 37 |
| Volunteer Recruitment.....                              | 37 |
| Volunteer Training.....                                 | 37 |
| Volunteer Supervision.....                              | 38 |
| Volunteer Feedback.....                                 | 39 |
| <b>Appendix</b> .....                                   | 41 |
| Using Citizenshipworks to Create an RLS Program.....    | 42 |
| Remote CFI Prep Pilot Project Volunteer Agreement ..... | 44 |
| Example Limited Service Agreement - AAJLA.....          | 47 |
| <b>Contributors</b> .....                               | 49 |
| <b>Partners</b> .....                                   | 50 |

\* This is an interactive table. Click section titles to navigate.

# Executive Summary

This manual is the collective effort of more than 10 nonprofit immigration organizations and projects. We met regularly for over a year, to explore ways to leverage technology, and share strategies that improve access to justice for rural and underserved communities.

In early 2019, we surveyed and interviewed immigration nonprofits across the country to find out:

- Whether and how organizations are using technology to connect people to legal information or services.
- What are the barriers to providing offsite legal information or services ("Remote Legal Support").
- How national networks and organizations can help the field develop and deliver Remote Legal Support (RLS).

We collected responses from more than 200 immigration nonprofits with a range of roles and services in the field. In general, they had little experience but strong interest in technology-based strategies to reach rural and underserved communities. They identified barriers to developing Remote Legal Support projects, including insufficient staff, partnerships, training, and technology. They also identified resources that would help them explore the options: a training manual, examples of successful programs, sample documents, and more.

We created this manual in response to the national survey. We've published key findings from the national survey results, to share the nonprofit immigration field's experience and interest. The manual features successful RLS programs, including program logistics, processes, challenges, tools, checklists, sample documents, and best practices. Finally, it includes projects and models from across the nonprofit sector.

We hope the manual inspires confidence, and helps nonprofits and pro bono lawyers engage rural and underserved communities. In the months ahead, we will offer training webinars on successful programs, to answer questions and provide additional support. We plan to connect partners for pilot projects, to explore the RLS model. We hope this manual helps the field reach more people, and improve access to justice.

# Introduction

The supply of immigration legal services – including private attorneys, nonprofit organizations recognized by the Department of Justice to provide legal assistance, and a smattering of online or other resources – falls far short of the demand. For example, a 2013 study by the Urban Institute found that, “the infrastructure for assisting undocumented immigrants is very thin, compared to projected needs.”<sup>1</sup> A 2018 report by the New York Immigration Coalition found that even after “extraordinary investments” by governments and philanthropy in very well-resourced states such as New York, the existing legal services infrastructure was capable of serving “only a fraction” of immigrants in need of assistance.<sup>2</sup>

The demand for immigration legal services is far-ranging. It includes lawful permanent residents applying for citizenship, those seeking to petition for family members, and the man-made crisis at the US-Mexico border for prospective asylum applicants. Because of the limited supply of high quality, low-cost immigration legal services, many low-income people will delay or forego completing applications. Asylum seekers will give up, or lose their cases, and return to dangerous conditions. We need to find new ways to get more legal information, help, and services to immigrants and other underserved communities.

Given the diverse and complex demands on legal service providers, our field is exploring innovative solutions to stretch capacity. Advocates across the nonprofit sectors are using technology and legal empowerment strategies to make existing processes more efficient. Instead of driving to clinics or appointments to meet with clients, they use technology (Skype, Facetime, SMS/text) to meet with clients remotely or review applications. Clients can use their phones to take pictures and text documents for review. They can use online tools to complete parts of applications on their own, such as biographic information. Legal service providers are also working with organizers, navigators, volunteers, and non-legal services staff to assist with document preparation or use online tools to add capacity. The legal advocates can focus their time reviewing eligibility, red flags, or legal concerns. This staffing model allows the legal staff to work at the top of their license and allocate their resources most efficiently.

Technology is not a silver bullet, but common tools like cell phones, tablets, and computers can help stretch limited legal resources. This manual provides examples of ways that nonprofit organizations are using technology to provide **remote legal support**, and extend capacity.

**Contributed by:**  
Laura Vazquez  
Senior Program Manager, Immigration Initiatives  
UnidosUS

---

<sup>1</sup> Erwin de Leon and Robert Roach, “Immigrant Legal-Aid Organizations in the United States,” Urban Institute, <https://www.urban.org/sites/default/files/publication/24066/412928-Immigrant-Legal-Aid-Organizations-in-the-United-States.PDF>, 2013. See also, Catholic Legal Immigration Network, Starting a Legal Immigration Program, [https://cliniclegal.org/sites/default/files/starting\\_a\\_legal\\_immigration\\_program\\_0.pdf](https://cliniclegal.org/sites/default/files/starting_a_legal_immigration_program_0.pdf), 2010.

<sup>2</sup> No Safe Harbor, New York Immigration Coalition and The Immigrant Advocates Response Collaborative, <https://d1jikt90t87hr.cloudfront.net/323/wp-content/uploads/sites/2/2017/03/No-Safe-Harbor-2018.pdf>, updated 2018.

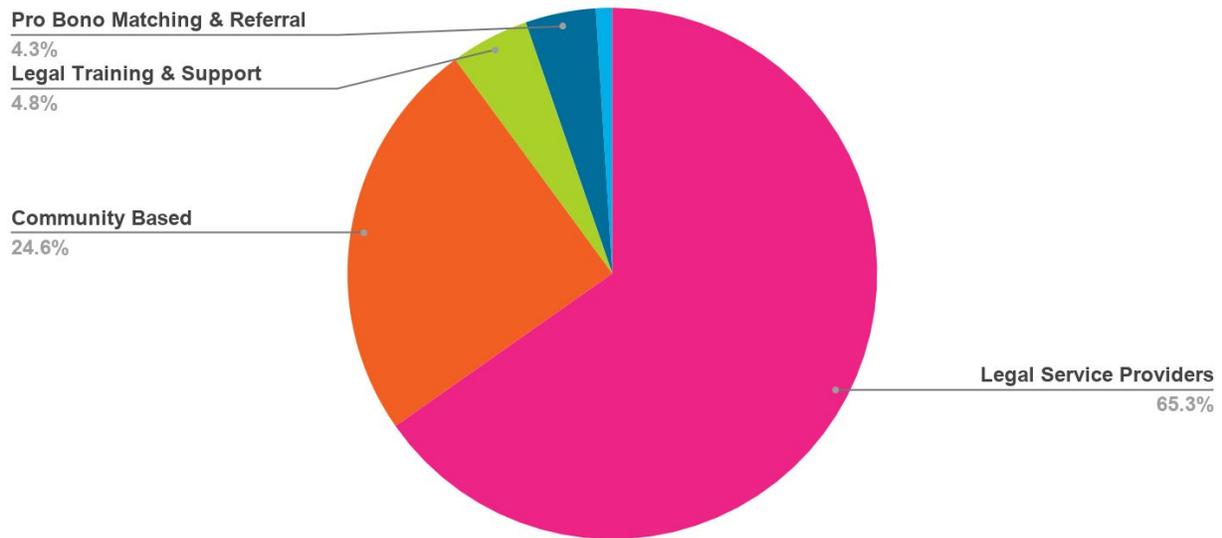
# Chapter 1: Survey Results

In early 2019, Pro Bono Net's Immigration Advocates Network conducted a national survey to gauge the immigration field's attitude toward Remote Legal Support (RLS). We wanted to find out how many organizations use technology-based strategies to reach remote and underserved populations; and how many organizations are interested in developing RLS programs. The survey results provide a number of useful insights. This chapter highlights PBN's survey process, key findings of the survey, and implications for this guide.

## Process

We sent the survey to more than 6,000 nonprofit immigration advocates. The survey garnered over 200 responses, reaching legal service providers (65.3%), as well as staff at community based (24.6%), legal training/support (4.8%), pro bono matching or referral (4.1%), and other (1%) organizations.

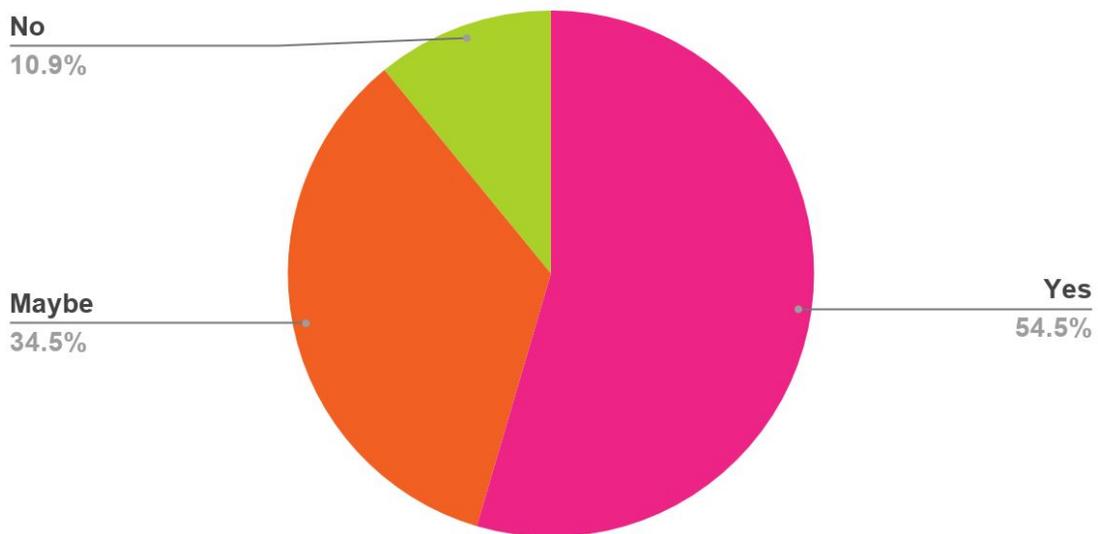
Figure 1. Types of Organizations Surveyed



## Need for Remote Legal Support

The survey responses reflect a strong interest in Remote Legal Support (RLS) strategies to leverage limited resources and reach more people. As Figure 1.2 illustrates, the majority of surveyed organizations (54.5%) reported a need for remote strategies to connect people to legal support. Another 34.5% thought it might help. Among the legal service providers, 85.7% stated that RLS would improve their ability to reach underserved populations, and 71.4% foresaw RLS helping them leverage and better utilize existing legal staff.

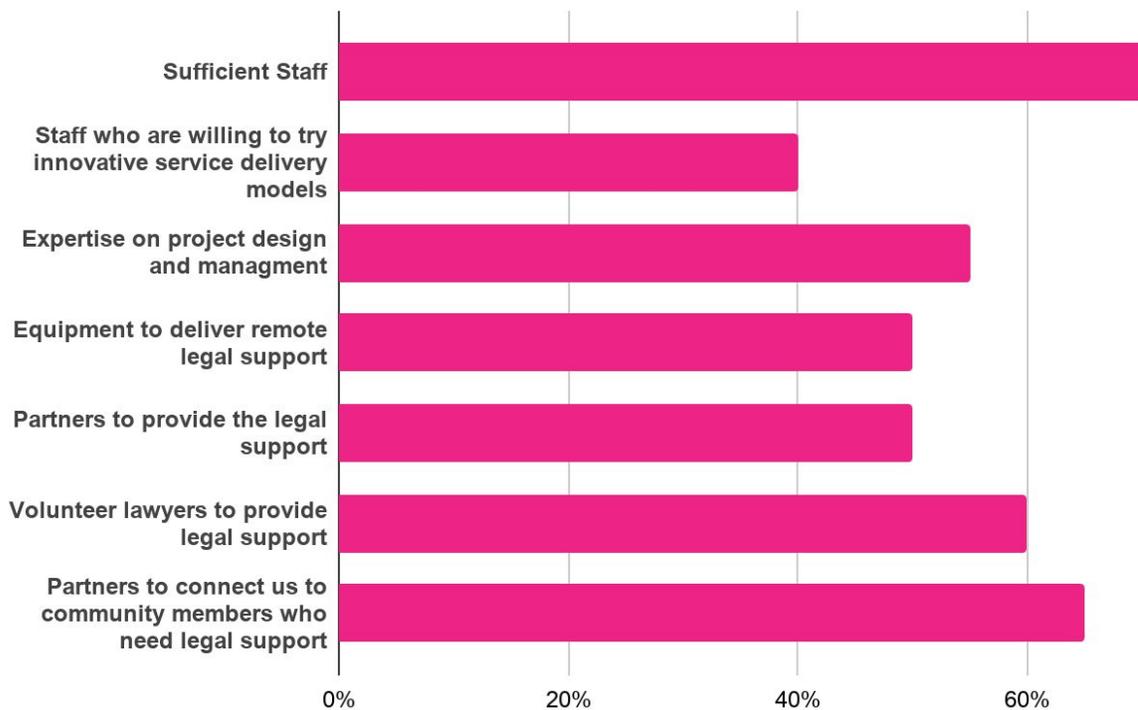
Figure 1.2. Need remote/online legal support for community members



## Interest vs. Capacity

Many organizations expressed enthusiasm for RLS (nearly 80%), but were not confident that they could implement remote programs. This theme continued throughout the survey. Organizations reported that RLS would positively impact their work and ability to reach underserved communities (85.7%), but were concerned about how to staff programs (70%) and how to connect to those in need (65%). Figure 1.3 illustrates the challenges the survey responses identified for building RLS programs.

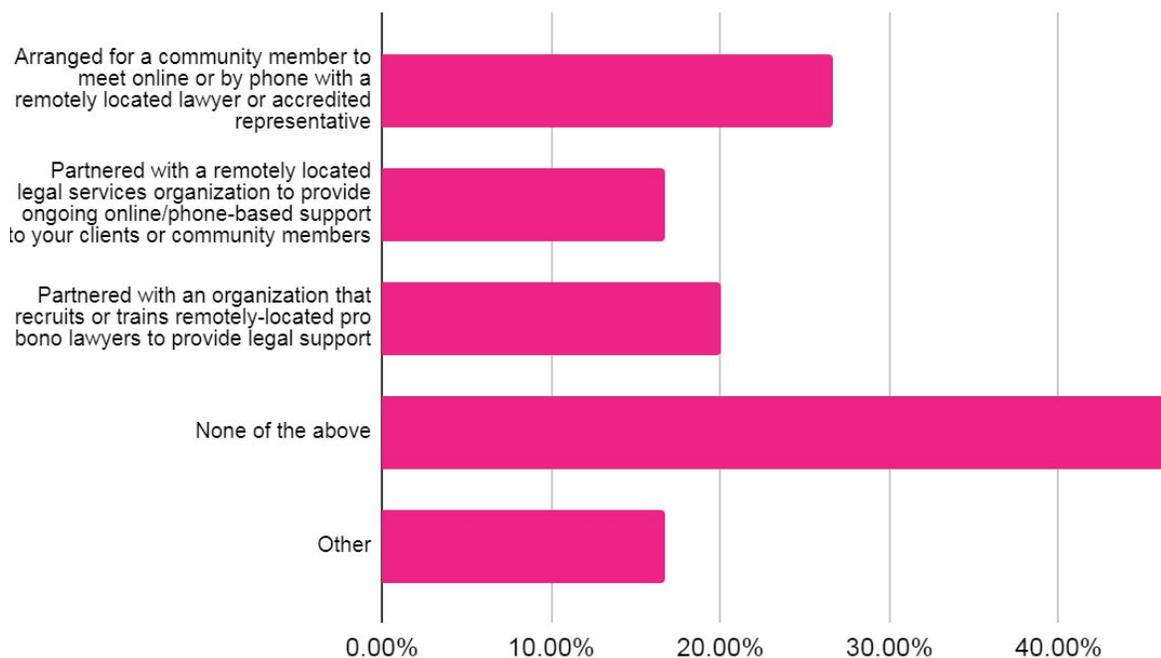
Figure 1.3. Barriers to Starting Remote Legal Support Projects



## Experience

The survey revealed that many (47%) of the non-legal service organizations had no experience providing remote legal support. Few organizations (27%) have arranged or referred those seeking services to virtual or telephonic meetings with lawyers. Even fewer have engaged in legal volunteer training (17%) or recruitment (20%) for remote legal support or services. The lack of experience, combined with the perceived barriers, explains why only 22% of respondents had confidence in their ability to organize a RLS program.

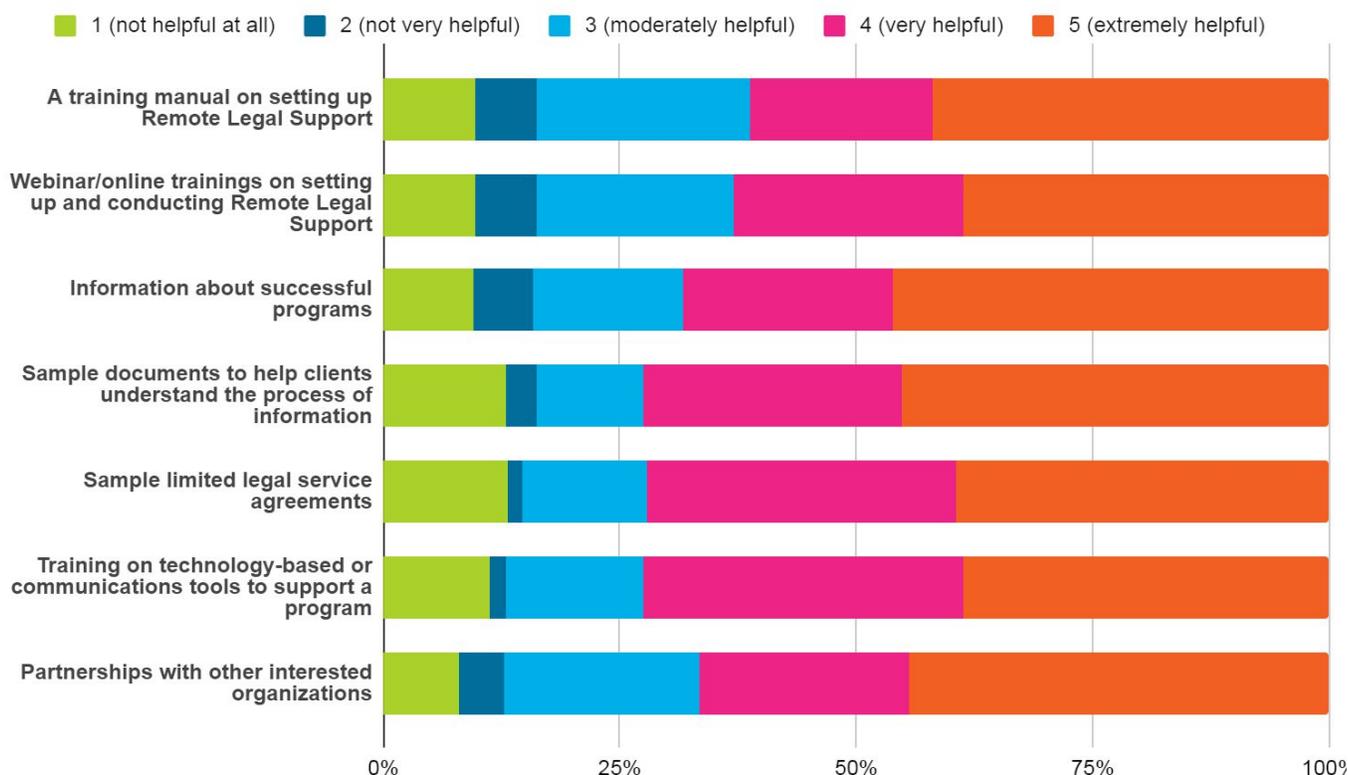
Figure 1.5. Have you or colleagues at your organization:



## The Need for Resources

Our survey asked the field to identify resources that would help them develop RLS programs. Most (83.9%) legal service providers reported interest in a training manual. Similarly high percentages indicated that webinar trainings, information about existing programs, and partnerships would help create or expand RLS programs. Interest is particularly strong for technical training and sample legal service agreements and documents.

Figure 1.4. Legal service providers: What resources would be helpful to develop/grow a remote legal support model?



## Conclusion

The nonprofit legal field recognizes the challenges to improve access-to-justice. Too many people do not have the information, help, or service they need to solve their legal problems. The survey results show strong interest among advocates in offering a Remote Legal Support (RLS) model. However, the results also show a lack of confidence to create or maintain RLS programs. This manual creates a path forward for organizations that want to explore RLS. By learning about the tools, service models, and strategies for working with the community, organizations may implement new approaches to making the law and legal system more accessible.

**Contributed by:**  
Dominic Hussain  
AmeriCorps VISTA/Remote Project Volunteer Coordinator  
Pro Bono Net

[Take our Survey](#)

## Chapter 2: Technology

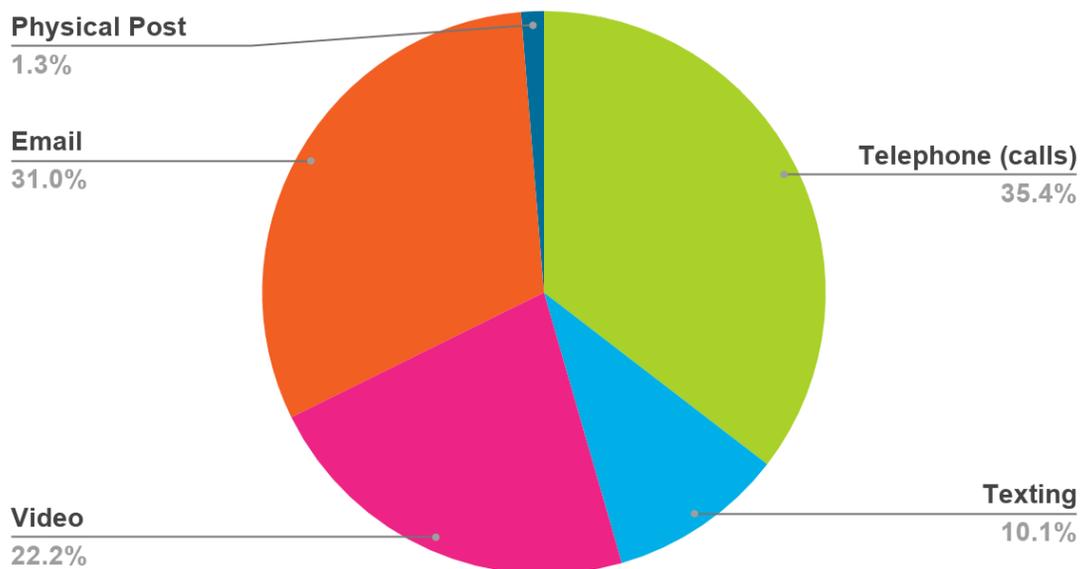
Our survey results show that nonprofit staff believe technology-based innovations for service delivery require advanced technology tools. Many nonprofit staff think they do not have the technical capacity to connect and provide remote legal support (RLS). This section will discuss:

- The tools RLS programs use
- The benefits of technology-based strategies
- Challenges to using technology

### Tools & Resources

The survey identified current practices by organizations using RLS. As Figure 2 illustrates, **the primary tools for existing RLS programs are phones, computers, and cameras/recording devices.** However, **half of all respondents** cited a lack of necessary equipment as a major barrier to remote legal support. Equipment or technology expertise should not be a hurdle. Current programs are using ordinary technology that makes RLS easy to set up.

Figure 2. Technology/Tools used for RLS



[Take our Survey](#)

## **Citizenshipworks**

Most RLS projects rely on ordinary and widely-used technologies to connect with people who need information or services. In this manual, a number of successful RLS programs use [Citizenshipworks](#) too. It is a nonprofit online tool that guides applicants through the naturalization application, and flags potential legal issues. Applicants can fill out the form on their own, and get the legal help they need, through a network of nonprofit legal service providers. Advocates and applicants can collaborate online, in a secure environment, to address any legal issues together. Citizenshipworks is an easy way for nonprofits to connect community members to RLS. (See [Appendix](#) for more information).

## **Benefits of a Technology-Based Strategy**

This manual can help organizations leverage available technology and tools to better serve target populations. RLS has additional positive impacts for the community, clients, organization staff, and volunteer attorneys. It can save time, costs, and improve accessibility.

### **Time**

Remote Legal Support can save time for nonprofits, volunteers, and clients. Nonprofit staff work hard to provide and coordinate legal services in underserved and rural communities. They must arrange their own travel; and accommodate volunteer attorney schedules, preferences, client locations and limited availability, etc. to meet in-person.

The American Bar Association's Rural Pro Bono Initiative documented these challenges in its [2003 Rural Pro Bono Delivery Guide](#). The guide focused on satellite clinics that required volunteer and staff travel. Despite many technological innovations since the guide was published, not much has changed for the satellite clinic model. It successfully connects people to resources, but other strategies are needed to reach more people. RLS delivery models have the potential to save time and effort, and supplement or streamline the work of satellite clinics.

For example, the [Legal Information for Families Today's \(LIFT\) Family Legal Connection](#) program uses computers, phones, and their specially designed online platform to overcome barriers to reaching rural parts of New York State. LIFT reaches new communities through technology, and reduces the demands on satellite clinics too. This model saves attorney and applicant travel time and makes legal information, advice, and services more accessible.

### **Costs**

RLS can save money for organizations. Some RLS strategies incur little or no cost to organizations, with volunteers/clients using their own devices. Other programs subscribe to a

[Take our Survey](#)

secure document exchange or communication platform. These models can reduce the costs of service over time, despite the investment in basic technology.

The [Dilley Pro Bono Project \(DPBP\)](#) manages the costs by connecting asylum seekers with trained volunteers across the country for remote consultations via computer/telephone based systems. A cloud based phone system enables legal volunteers from all over the country to provide services and advice to people in detention. By shifting from a travel-intensive clinic that visited geographically isolated detention centers to a technology-based communication model, DPBP makes it more affordable to serve more detained immigrants.

## Accessibility

Remote Legal Support strategies enable individuals to access guidance and information wherever they may be. RLS can help clients overcome a lack of local legal resources, limited mobility, systemic societal barriers, and challenging work/life schedules.

Remote models bridge physical distances that prevent people from getting help. The demand for legal support is high in rural communities. According to the Legal Services Corporation's *Justice Gap* report, 75% of U.S. rural households had at least one civil legal problem in 2017.<sup>3</sup> Even in states with large metropolitan areas like New York or Illinois, the scarcity and dwindling number of attorneys in rural counties present challenges.<sup>4 5</sup> Remote Legal Support can help fill the rural justice gap, by reducing the need for local brick and mortar services.

Remote access can be a real benefit for people with disabilities. The Center for Disease Control reports that 26% of adults in the United States have some form of disability, with 13.7% of those mobility-related.<sup>6</sup> According to the Legal Services Corporation, 80% of households with persons with disabilities had one civil legal problem in 2017.<sup>7</sup> The RLS model enables people to access information or legal services, with little or no travel.

Across the U.S., specific populations are more likely to encounter heightened or additional barriers to obtaining legal services. Nearly 21% of Black and/or African Americans, and 18% of Hispanics and Latin(x) people, have incomes below the Federal Poverty Line.<sup>8</sup>

---

<sup>3</sup> *Id.*

<sup>4</sup> Christian Nolan, "Lawyer Shortage in Small-Town NY: NYSB Takes Lead to Address Growing Rural Justice Crisis," New York State Bar Association. [https://www.nysba.org/StateBarNews/2019/Fall/Lawyer\\_Shortage\\_in\\_Small-Town\\_NY/](https://www.nysba.org/StateBarNews/2019/Fall/Lawyer_Shortage_in_Small-Town_NY/). (2019).

<sup>5</sup> Mark C. Palmer, "The Disappearing Rural Lawyer: 2Civility." 2Civility, [www.2civility.org/the-disappearing-rural-lawyer/](http://www.2civility.org/the-disappearing-rural-lawyer/), (August 27, 2019).

<sup>6</sup> "Disability Impacts All of Us," Center for Disease Control and Prevention. <https://www.cdc.gov/ncbddd/disabilityandhealth/infographic-disability-impacts-all.html>, 2018.

<sup>7</sup> Legal Services Corporation. (2017). *The Justice Gap: Measuring the Unmet Civil Legal Needs of Low-income Americans*. Prepared by NORC at the University of Chicago for Legal Services Corporation. Washington, DC..

<sup>8</sup> Jessica Semega, Melissa Kollar, John Creamer, and Abinash Mohanty, U.S. Census Bureau, *Current Population Reports, P60-266, Income and Poverty in the United States: 2018*, U.S. Government Printing Office, Washington, DC, 2019.

[Take our Survey](#)

Disproportionate levels of poverty, institutional racism, and other related barriers make it even harder for communities of color to access legal resources and support. By working to develop resources that community members can access, RLS can help reduce the impact that longstanding inequities have on people's access to legal support and information.

Technology helps people access legal information or work on their own cases outside of the usual office hours. This is helpful for low-income clients, who may have less flexible job schedules, or no paid leave to take care of legal and personal issues. In the [GMHC model](#), independent users of the [Citizenshipworks tool](#) can access and edit their naturalization application on their own time before scheduling a legal review. In some cases, they may complete the application on their own, and not require legal review. .

Remote legal support models can supplement traditional models, to reach rural and underserved communities, and reduce demographic disparities in legal aid. When organizations implement an RLS model, they are addressing the barriers and accommodating their clients' needs.

## Challenges with Technology

Though RLS can lead to more efficient and far-reaching services, its success depends on adapting strategies to create a good fit for the community. Many rural areas do not have adequate access to the internet to support remote tech-based services. Only 68.6% of rural Americans have strong internet and cellular connection.<sup>9</sup> With 60 million Americans living in rural areas, approximately 19 million people are without high speed/strength connections.<sup>10</sup> The Federal Communications Commission says it "must continue its work to encourage deployment of broadband to all Americans, including those in rural areas..." Meanwhile, there are rural communities that lack the basic infrastructure for internet-based strategies.

Some people may need more help or encouragement to embrace technology. Years ago, Three Rivers Legal Services (TRLS) in Florida faced challenges in its tech-based efforts to reach an underserved community. TRLS set up a limited-service consultation program using video-conferencing. TRLS partnered with the local public library in a rural community to run a virtual legal aid clinic. This was their model:

---

<sup>9</sup> "2018 Broadband Deployment Report Finds Agency Actions Have Restored Progress," Federal Communications Commission. <https://docs.fcc.gov/public/attachments/DOC-349016A1.pdf>, 2018.

<sup>10</sup> "American Community Survey: 2015," United States Census Bureau <https://www.census.gov/newsroom/press-releases/2016/cb16-210.html>, 2016.

- Clients sign up for TRLS services on the web
- Clients' requests were reviewed
- Approved clients schedule appointments at the library
- Clients have a video consultation with pro bono attorneys

After setting up the clinic, TRLS found that clients were having trouble operating the equipment. This proved a major barrier to service for many, who eventually needed in-person help from the library staff. Organizations experimenting with remote support will find some community members need local help to use the technology.

The right setting or connection can be a challenge too. A person may be hesitant to use a public or shared computer. They may not want to discuss sensitive topics in a computer lab, or share their data online. Organizations and tools should be prepared to address concerns about privacy and security. As a best practice, legal service providers explain their client confidentiality policy, and have agreements for volunteers to sign. (See [Appendix](#)). The Citizenshipworks tool offers a plain language [privacy policy](#) to address user concerns.

RLS providers must clarify their role, the scope of their assistance, and their relationship to the person accessing support. People may be unsure whether they have an attorney-client relationship with the organization or tool. If the RLS services are "unbundled," then only parts of a clients' case or process are addressed. A [Limited Service Agreement](#) or [terms of use](#) set expectations to avoid confusion or disappointment. (See [Appendix](#)).

## Conclusion

A combination of strategies can achieve the most effective service delivery to a rural or underserved community. Many organizations featured in this manual have established successful RLS programs. Legal aid and pro bono service delivery models do not have to be all or nothing, but should be structured around the needs, demographics, expectations, and lives of the communities served. That is how organizations effectively implement RLS.

**Contributed by:**  
Dominic Hussain  
AmeriCorps VISTA/Remote Project Volunteer Coordinator  
Pro Bono Net

## Chapter 3: Service Delivery Models

### Project Profile: Asian Americans Advancing Justice – Los Angeles Overview

Asian Americans Advancing Justice - LA (Advancing Justice - LA) provides remote naturalization assistance to applicants, as the primary legal services partner in the New Americans Campaign's (NAC) Virtual Review Pilot. The NAC Pilot launched in 2019 to develop a replicable, scalable model for mobilizing lawful permanent residents (LPRs) to apply for naturalization. The goal is to test an innovative virtual review service delivery model that could lead to significant increases in the number of LPRs completing naturalization applications. Advancing Justice - LA uses Citizenshipworks to help applicants across the country.

Working in close partnership with the Immigrant Legal Resource Center (ILRC) and the Immigration Advocates Network (IAN), Advancing Justice - LA provides remote naturalization services including: answering citizenship questions, application completion, legal review of a completed application, providing self-filing instructions, and fee waiver information and assistance.

During the Pilot year, Advancing Justice - LA assisted applicants routed to Citizenshipworks from NAC's digital communications campaigns and DIY applicants who found their own way to the Citizenshipworks platform. More recently, Advancing Justice - LA has shifted focus to building relationships with community-based organizations (CBOs) that are ready sources of applicant referrals. The main criteria for referral CBO partners is that they are trusted by eligible-to-naturalize LPRs in their respective communities (through citizenship class offerings, for instance), have access to technology (computers and/or Wi-Fi) to facilitate Citizenshipworks access, and are located in communities that need more access to legal services providers.

Most of the applicants who are referred to Advancing Justice - LA's legal services have started their applications on Citizenshipworks, but request or require support to complete the process and generate applications to file with USCIS. The level of support that Advancing Justice - LA provides to citizenship applicants varies from case to case, from addressing basic naturalization process questions to analysis of complex eligibility issues based on criminal history. Some applicants must be referred out because they are unable to confirm their eligibility to naturalize without the analysis of state laws outside California. Other applicants request referrals based on their preference to receive in-person or local services.

The Pilot utilizes the Citizenshipworks platform to assist applicants as they finalize their applications. The key benefits of using the platform are that the applicant and the service provider can securely interact with each other through the platform using the message, chat, and virtual review functions. They can share access to the most current version of the citizenship application. Typically, applicants will work on their applications on Citizenshipworks on their own time, and Advancing Justice - LA advocates will then make edits to the application

directly on the platform during the legal review process. The applicant can download the finalized application once the advocate removes the draft watermark.

### Model/Workflow

For eligible applicants who have created accounts on Citizenshipworks and completed most of their applications:

1. Applicant opts in to Advancing Justice - LA's services through Citizenshipworks
2. Advancing Justice - LA conducts a conflicts check
3. Advancing Justice - LA staff reviews applicant's Citizenshipworks account and application
4. Advancing Justice - LA staff sends welcome email or text to schedule intake call, or calls applicant directly, depending on information available
5. Legal intake call
  - a. Includes fee waiver screening, addressing applicant questions, scheduling virtual legal review of near-complete citizenship application (if applicable)
6. Applicant executes limited scope service agreement (via SignNow, similar platform)
7. Legal review via Citizenshipworks (or Zoom videoconference)
8. Follow-up (information/document gathering, legal research, as necessary)
9. Applicant receives final application (and completed fee waiver form, if applicable) and closing letter with self-filing instructions and USCIS processing information

### Checklist of Tools + Templates

- Citizenshipworks advocate account
- Computer with video camera
- Legal case management system
- Limited scope service agreement
- Instructions on accessing Citizenshipworks VR tool or Zoom videoconference/app
- Access to secure videoconference platform, e-signature tool, texting platform (if available)
- Legal review guidelines
- Self-filing instructions
- Self-study guide

### Early Learnings + Observations

1. **Make the process for applicants to opt-in to legal services as simple as possible.** The more steps there are to secure applicants' permissions for legal referrals and services, the more likely that applicants may not continue with the process. Applicants using technology for the naturalization process and engaging with unfamiliar organizations may already be hesitant to move forward with remote legal services.
2. **Build trust early and use clear messaging that conveys the availability of free, trusted legal services.** Applicants were generally responsive to opt-in messaging that mentioned the offer of a free legal consultation and also explained the types of services

[Take our Survey](#)

available. The availability of fee waiver assistance also increased applicants' responsiveness to messaging.

3. **Applicants with near-complete applications on Citizenshipworks may still require significant follow-up.** The Citizenshipworks tool flags criminal issues and other complications for legal review. Nonetheless, almost all applicants with criminal or complex immigration histories waited to share the relevant history at intake or during legal review session, rather than enter it on the Citizenshipworks platform. In addition, many applicants required follow-up to obtain additional information and/or documents necessary to complete their applications, which would cause delays in the process.
4. **Texting applicants improved applicant responsiveness.** Once Advancing Justice - LA staff began texting applicants, at the initial stages of scheduling and even after applicants were unresponsive to email and phone follow-up efforts, more applicants responded to start or continue services. Some even responded to indicate they were no longer interested in moving forward with the process. Even though applicants had created their Citizenshipworks using an email address, many did not seem to check email accounts frequently. And although it was difficult for some applicants to speak by phone during the workday, texting helped with scheduling calls during other windows.
5. **Support from out-of-state NAC partners made it possible to assist applicants with complex cases and out-of-state legal issues.** Advancing Justice - LA readily assisted applicants outside of California with complex legal issues (negative immigration history, travel and possible abandonment of LPR status, taxes, and others), but could not advise applicants who had criminal records outside of California. Legal partners in relevant states provided the necessary technical assistance and confirmed legal research in order to advise these applicants fully and ethically.

**Contributed by:**  
Carolyn Kim, Esq.  
Project Director  
Asian Americans Advancing Justice - LA  
New Americans Campaign Virtual Review Partner

# Project Profile: Colorado Legal Services

## Overview

Colorado Legal Services (CLS) received grants from the Legal Services Corporation through the Pro Bono Innovation Fund (PBIF) Grant, to explore the expansion of rural pro bono services. CLS used these grants to create, launch, evolve, and evaluate five clinic models that increase legal resources to low-income rural communities in Colorado. These clinics accomplish this goal by utilizing technology, metro-based volunteer attorneys, and local partnerships.

## Models/Workflows

**Multi-Region Record Sealing and Expungement Clinic:** This clinic serves 24 counties and assists people in sealing or expunging their criminal records to mitigate collateral consequences that result from criminal convictions (which impact clients' ability to obtain employment, public housing, education and public benefits). This clinic uses a staff attorney to evaluate a client's record for eligibility, and then if eligible, the staff attorney drafts the necessary court forms needed to petition. This work is completed via phone and email, but all drafted documents are sent via mail.

**San Luis Valley Virtual Satellite Clinics:** These clinics increase the legal resources available to the low-income San Luis Valley community by having two virtual, satellite clinics outside Alamosa County. These virtual clinics cover a range of civil legal topics and are conducted in partnership with the Saguache Public Library and the Blanca/Fort Garland Public Library. These clinics happen concurrently, which allows one pro bono attorney to serve both locations at the same time. This model has been replicated. One clinic virtually serves locations in Dillon and Eagle with one volunteer attorney, and another clinic virtually serves Clear Creek and Summit locations concurrently with one attorney. These clinics serve 10 counties.

**San Luis Valley Caregiver Clinic:** This monthly clinic helps adult caregivers obtain legal authority over minor children in their care so that they can make vital educational, financial and health decisions for the children in their care. This clinic provides the San Luis Valley (six counties) with volunteer attorneys from Kilpatrick Townsend Stockton. The attorneys give on-going advice to clients and draft court documents as they go through the court process to get an adoption, guardianship of a minor, or allocation of parental responsibilities. This clinic is hosted by the Alamosa CLS.

**Cortez Family Law Clinic:** This monthly clinic in Cortez assists low-income clients in two counties with family law issues related to new and old cases, including divorce, custody, child support, modifications, and judgments and contempt actions related to enforcing previous court orders. This clinic gives clients the option to set an appointment or drop-in. This clinic is done by videoconference and screen sharing, allowing attorneys and clients to fill out forms together, which are then e-mailed or mailed to the client to file pro se.

**Eastern and Western Colorado "Call For All" Clinic:** This general clinic uses pro bono attorneys from Brownstein Hyatt Farber Schreck, who provide a minimum of a half-hour of legal

[Take our Survey](#)

advice by telephone for low-income clients in 22 counties. Phones allow those in the most rural areas to obtain assistance. Internet access is very limited in the frontier parts of Colorado.

### Checklist of Tools

Tools for the models vary per specific clinic.

- Partnerships with local organizations/host locations and their staff
- Organization staff to manage the videoconference and screen clients in real time
- Computers with cameras/webcams for videoconferencing
- Access to secure videoconference platform, fax or scanner, e-mail , text (email, phone, etc.)
- Organizational Zoom account (videoconferencing & telephonic meetings)
  - Instructions on accessing Zoom videoconference/app (for volunteers and clients)
- Legal case management system
- Clinic-specific applications, including a limited scope services agreement

### Early Learnings + Observations

1. **Design for the communities you will be serving.** CLS works with a variety of underserved communities across the state, with different legal service needs. Because of this, CLS was open to developing multiple/small focused clinics.
2. **The design process is often overlooked.** To develop models, CLS used a bottom-up, client-based approach. CLS staff contacted local organizations and groups in the rural areas they hoped to serve. Together they assessed which communities were most underserved, and what issues were most pressing. CLS mapped the assets and resources of each rural region, and developed five unique models based on the maps..
3. **The model has to be adaptable.** Each clinic model has been adapted and modified since it was launched. For example, locations or drop-in periods were added. Adaptations are necessary to respond to the developing needs and culture of the rural community.
4. **Work with the resources you and your communities have.** CLS found that reliable wifi was a barrier for many potential clients. The best practice is finding well-resourced public institutions (like libraries) that offer dependable internet connections. This implicates privacy concerns too.

**Contributed by:**  
Jen Cuesta, Esq.  
Rural Pro Bono Program Attorney  
Colorado Legal Services

## Project Profile: Dilley Pro Bono Project

### Overview

In May 2018, Fordham Law School's Feerick Center for Social Justice and Texas RioGrande Legal Aid ("TRLA") received the Emil Gumpert Award from the American College of Trial Lawyers to expand and enhance remote access to limited-scope legal services for asylum-seeking families detained in the South Texas Family Residential Center (STFRC) in Dilley, Texas, who were receiving services through the Dilley Pro Bono Project ("Dilley Project").

The Dilley Project provides *pro bono* legal services to women with children detained at the 2400-bed STFRC, and recruits and organizes volunteer teams who travel to Dilley each week. Volunteers and staff work long hours to provide various services to detained clients including Credible Fear interview (CFI) preparation. As many as 100 clients a day seek legal assistance in preparing for their CFIs although the number of interview preps fluctuates from day to day.

In response to this significant need for CFI preparation, the Dilley Project and the Feerick Center collaborated to develop the Remote Prep Pilot Project. The project goals include: 1) utilize technology to expand and enhance access to remote legal services, 2) create best practices related to the provision of remote legal services, and 3) develop a model that can be replicated at other detention centers.

The Pilot Project uses a cloud-based phone system to connect asylum-seekers with highly trained and experienced, remote volunteers located across the country. These systems host phone connections and store data digitally on a cloud, and do not require landline phones. Calls can be placed or received from a computer or through a phone app. A cloud-based phone system is preferable because it enables volunteers spread across the country to connect with clients without using their personal phones or phone numbers, and ensures privacy. A Call Coordinator at STFRC helps clients place confidential phone calls to remote volunteers; and serves as an in-person point of contact for clients.

Volunteers use a Checklist Form, an interactive script and guide, to complete each remote consultation. The Checklist Form leads volunteers step-by-step through a CFI preparation. The form includes sections on building rapport with clients, screening for advocacy issues, identifying a client's nexus to a protected ground, assessing the strength of the clients claim, etc. These sections have checklists of actions that volunteers are required to complete. They also include questions with multiple choice answers, or fill in the blank responses. Certain answers prompt the volunteer to contact a supervisor.

The supervisor provides in-the-moment supervision and support to volunteers remotely via online chat or telephone call. The Supervisor reviews the volunteers' Checklist Form prior to signing off on the completion of a CFI prep. The answers in the Checklist Form flag the Supervisor if there is a legal issue for the volunteer to address before the CFI prep is complete.

## Model/Workflow

For clients (women with children detained at STFRC who seek legal services from the Dilley Project):

1. Receive legal appointment to attend group Know Your Rights presentation
2. Complete group pre-screening (language, type of proceedings, age of children)
3. Receive photo card with volunteer name, photo, and phone number
4. Make confidential phone call to volunteer with help of Call Coordinator.
5. Discuss fear claim and asylum process with volunteer
6. Complete exit survey with Call Coordinator
7. Attend in-person follow up if needed

For volunteers:

1. Log in to email account, cloud-based phone system account, and case management system at start of shift
2. Receive phone call through app from client
3. Use Checklist Form as interactive script and guide to complete prep
4. Consult with Supervisor about case and contact Call Coordinator via chat as needed
5. Submit Checklist Form for Supervisor to review
6. End call after receiving Supervisor approval

## Checklist of Tools + Templates

- Volunteer email account
- Cloud phone system account
- Checklist Form (Google Forms)
- Computer
- Cell phone (optional, may use phone or computer app to receive calls)
- Legal case management system
- Volunteer Agreement
- Volunteer Manual
- Interactive, on-demand training

### **Contributed by:**

Julia Potach  
Remote Legal Services Consultant  
The Dilley Pro Bono Project

# Project Profile: Family Offense Petition Program

## Overview

The New York Family Offense Petition (FOP) Program is a state-wide partnership between Pro Bono Net, the New York Courts, and over 150 domestic violence advocate groups. The FOP Program is a key asset to the state-wide Remote Access Temporary Order of Protection Program that enables survivors to file for orders of protection using video-conferencing tools. It makes this legal option safer and easier than physical travel to court or in-person hearings.

First piloted in the Bronx County in 2012, the program provides domestic violence advocates in every county of New York with access to an online document assembly interview, powered by LawHelp Interactive. Advocates ask clients the questions for the online interview document. The client's answers populate a draft petition for a court order of protection. Advocates can also e-file their clients' petitions directly with the New York Courts' system through the program. The FOP Program simplifies the petition drafting and filing process.

Nearly 7,000 petitions were filed using the FOP Program in 2019. The FOP Program continues to grow and develop. One of the program's primary goals is to streamline the order of protection process for advocates and litigant survivors of intimate partner/household violence by providing the option to navigate the system remotely. This is more convenient and helps protect survivors from retaliation and detection.

## Model/Workflow

### For Clients:

1. Individuals are referred to advocates and/or seek out advocates using the FOP Program
2. Advocates conduct intake interviews by phone or in person.
3. If they qualify for services, the client answers questions from the FOP Program interview.
4. The client indicates if they would like the advocate to e-file their petition through the FOP Program.
5. After the petition is filed, the judge determines whether they are eligible for a remote hearing via videoconference (this option is not available statewide).

### For Advocates:

1. DV organizations request to join the program
2. Approved advocates are trained by regional court system representatives.
3. Advocates request member accounts on LawHelpInteractive (a project of Pro Bono Net) and the Family Justice/DV area on Pro Bono Net at <https://www.probono.net/ny/family>. This double vetting system ensures only qualified persons are providing support through the program.
4. Once individuals have been trained and approved in these areas, they can use the program to create and file petitions for clients.

[Take our Survey](#)

## Checklist of Tools and Templates

- Computer (possibly with webcam)
- LawHelp Interactive account
- Family Justice / DV Area account and training
- Limited Service Agreement
- Organization-specific service delivery model/workflow
- Telephone

### **Contributed by:**

Liz Keith  
Program Director  
Pro Bono Net

Mirenda Meghelli  
Partnerships Manager  
Pro Bono Net

# Project Profile: Gay Men's Health Crisis (GMHC)

## Overview

Gay Men's Health Crisis (GMHC) was awarded a grant from the New Americans Campaign's (NAC) Innovation Fund to pilot a virtual review project in the fall of 2018. The purpose of this project was to increase access to legal assistance for lawful permanent residents (LPRs) applying for naturalization. Partnering with the Immigration Advocates Network (IAN), GMHC developed and implemented a live remote review model for citizenship applicants who have begun their N-400 applications using the Citizenshipworks online tool.

The distinguishing advantage of this model is that the application can be completed at the applicant's convenience, and the review and feedback can be conducted via the applicant's preferred communication medium. Additionally, community-based partner organizations (e.g., libraries, unions, etc.) refer applicants and assist with comprehension and completion of applications to maximize the number of applications filed and the efficiency of the project legal staff's time.

The process begins with applicants using Citizenshipworks. Applicants who have completed most of their application can opt for review services. Citizenshipworks staff also refers them to GMHC if the system identifies any red flags on their application. GMHC reviews applications by logging in to their Citizenshipworks advocate accounts and accessing the application. Once GMHC reviewers and applicants have made the necessary changes to their applications, they instruct applicants on how to file their applications with USCIS.

In the last year, 70% of participating applicants reached "ready-to-file" status on their applications, with many of the remaining 30% either receiving or referred to other resources. This project was so successful that GMHC launched a similar project with Dominicanos USA (DUSA), and is developing potential partnerships with Unite Here-Local 100 (a food preparers union) and The River Fund NY (a local food pantry).

## Model/Workflow

For applicants with active Citizenshipworks accounts who have completed a large majority of their applications:

1. Applicant creates an account on Citizenshipworks to fill out their application
2. Applicant completes application to the best of their ability
3. When the application is complete, or if the Citizenshipworks tool identifies any "red flags," (legal issues) the Citizenshipworks staff contacts them to offer free legal review with GMHC
4. Citizenshipworks staff connects applicant with GMHC project staff
5. Prior to conducting a virtual legal review, applicant acknowledges that they have read and understood the GMHC Limited Legal Services Agreement
6. Application is reviewed by project staff per the project guidelines
7. Questions and red flags in the application are addressed by GMHC staff
8. Applicant is either advised to proceed with filing their application or not
9. Fee waiver requests are addressed, and assistance is provided depending on eligibility

[Take our Survey](#)

10. Closing email is sent to applicant with final instructions
11. Citizenshipworks is notified of the outcome of application

### Checklist of Tools + Templates

- Citizenshipworks advocate account
- Computer and telephone
- Legal case management system
- Limited scope service agreement
- Instructions on accessing Citizenshipworks VR tool
- Legal review guidelines (for project staff & volunteers)
- Filing instructions for the applicant (both transcribed for applicant & script for staff)
- Independent study guide for the naturalization test for the applicant

### Challenges/Lessons Learned

- Have a technical support plan in place for potential bugs and difficulties.
- Explain to the clients that everything they tell you is legally privileged information and it is in their best interest to be completely honest with you.
- Keep legally privileged information confidential, share the general outcomes of consultations with the Citizenshipworks Team so that they can continue messaging unresponsive applicants or assist with non-legal follow-up.
- Consultations may have to be scheduled outside of regular business hours to accommodate an applicant's schedule as well as various time zones.

#### **Contributed by:**

Visahl Trivedi, Esq.  
Director of Immigration Legal Services  
Gay Men's Health Crisis  
New Americans Campaign Virtual Review Partner

# Project Profile: International Rescue Committee

## Overview

The International Rescue Committee (IRC) has piloted virtual legal services in different models over the past few years. These efforts have largely pivoted around an identified need to streamline and target legal services to better reach under-served areas and populations. Advantages of virtual legal services and associated objectives are:

- Streamlining services, increasing efficiency and harnessing technology to modernize immigration services with the potential to benefit both applicants and organizations
- Targeting time and effort to maximize the legal expertise of DOJ accredited representatives and attorneys to address community needs
- Greater geographic scope of services, bringing quality legal services to those in more isolated and remote areas
- Potential to serve more people through enhanced partnerships and leveraging of technology

In exploring and developing remote services, the IRC has utilized ad hoc virtual review services provided by select IRC offices through partnerships with employers and labor unions. These ad hoc services have largely been planned and employed as needed when applicants are located far from the service area in which a naturalization group processing event is being held. In addition, IRC offices in Kansas, Texas, and Utah have utilized technology to provide remote legal services through satellite offices in under-served parts of their respective states and regions. These services have included a range of needed benefits, including adjustment of status, family reunification, and employment authorization.

The IRC has implemented programming that focuses virtual review services on naturalization, partnering with the Immigration Advocates Network (IAN) and other nonprofits to provide legal review of naturalization applications through Citizenshipworks.

## Model/Workflow

IRC has experimented with varying workflows in providing virtual legal services based on the needs of the community, the capacity of the IRC and associated partners, and the context within which the services are provided. These workflows have been summarized in three general models as presented below.

### **Remote legal services and in-person support: IRC + voice & face technology + partner:**

IRC's offices in Kansas, Texas, and Utah have employed this model with their satellite offices. The satellite office, or partner organization, interfaces in-person with the applicant, gathering documents and coordinating times for intake and eligibility screening, assisting the client to prepare the application form, coordinating legal review, and providing support with general case management. The intake, eligibility screening, and legal review of applications are conducted by a legal representative via voice and face technology (Skype, Teams, etc.).

[Take our Survey](#)

Applications are submitted with an accompanying G-28 and IRC provides legal representation for each case.

### **All remote naturalization services utilizing Citizenshipworks (CW): IRC + CW (+ Partner):**

This model is being employed through partnerships with community organizations and employers as well as direct referrals from community outreach. Applicants are directed to IRC's dedicated portal on Citizenshipworks. When the applicant completes at least 90% of their naturalization application, an IRC legal advocate conducts legal review. The IRC makes a full assessment of the case and advises the client accordingly, connecting via voice and face technology to review the application and retainer, and address any questions. If the applicant is eligible and has a complete application, the IRC provides information on submitting the N-400, including screening for a fee waiver or reduction (I-912 and I-942) and assisting with the completion of these forms as needed. Applications are submitted *pro se*. At times, the IRC may advise that the individual seek other legal assistance for other forms of relief or assistance (for example, an N-648).

### **Remote legal services and in-person support utilizing Citizenshipworks for naturalization (IRC + CW + Partner):**

In this model, the applicant is at a non-legal partner organization and is communicating with IRC staff at arranged times to complete legal review of the application. The IRC in New York has used this with an employer in upstate New York, coordinating a group event. The employer provided the tools and assistance for applicants to complete their applications on Citizenshipworks and the IRC spoke with applicants and conducted legal review in real time. This has also been employed by the IRC in San Jose with the applicant off-site and receiving legal review and assistance. Applications in this model have been submitted *pro se*.

#### Checklist of Tools + Templates

- Legal scope of services agreement
- Email templates for communicating with applicants (initial introduction, referrals, instructions on submitting N-400 and overview of process)
- Interface: Citizenshipworks, Skype, Teams, etc.

#### Lessons Learned

### **Partnerships are valuable and can add capacity and resources.**

Having a partner working in-person with applicants can reduce legal staff time while increasing the support to applicants. In IRC's experience, partners have assisted with conducting outreach, setting up Citizenshipworks accounts, completing forms and getting signatures, answering general questions about the process and timelines, providing computers and space, and scheduling workshops. This can be particularly helpful for applicants who face potential challenges such as digital literacy and familiarity with computers, language skills, or presenting evidence for fee waivers.

[Take our Survey](#)

More general support streamlined IRC's role to focus on legal review. In instances where IRC was the only direct service provider, staff spent significant time on follow-up to ensure completion of applications and address general questions.

**Applicants may need additional support and case management services.**

Several applicants reported not applying because they were unable to pay the fees. The I-912 and I-942 are not on Citizenshipworks. The fee waivers/reductions for naturalization are a challenge to a streamlined workflow for comprehensive services. IRC staff provides these services outside CW, using other technology.

Follow-up on cases to ensure completion and answer general questions before and after submission has been time-consuming for IRC staff. These needs must be considered in developing remote services models, whether covered by the legal advocate or a partner organization.

**Contributed by:**

Amber Mull  
Associate Director, Immigration  
International Rescue Committee

## Project Profile: Legal Information for Families Today (LIFT)

### Family Legal Connection (FLC)

#### Overview

Legal Information for Families Today (LIFT) is a pioneering nonprofit dedicated to enhancing access to justice for families in the New York Family Court system. LIFT empowers people, by providing the tools they need to advocate for themselves in court. LIFT operates in the Family Courts, the community, and virtually, to help families address matters fundamental to their well-being. This includes custody, visitation, and child support. LIFT offers one-on-one legal advice consultations and provides critical information about New York family law on its Helpline, in the courthouses, in partnership with community organizations, and through a wide variety of Legal Resource Guides.

LIFT's [Family Legal Connection \(FLC\)](#) uses technology to provide legal services to pro se litigants navigating the New York Family Court system. The platform was developed by Pro Bono Net for pro bono attorneys and clients to meet by video chat and share documents on a website. This technology significantly expands LIFT's reach and enables people across New York State to receive in-depth legal advice and guidance from pro bono attorneys. Family Legal Connection helps close the justice gap by providing convenient, easily accessible legal information and advice.

Family Legal Connection uses a limited scope representation model. Pro bono attorneys meet with clients for a one-hour virtual meeting. The consultations focus on child support, custody and visitation, but may include questions about family offenses and orders of protection.

Clients can access the platform over their cell phones or computers without downloading any additional programs or applications. FLC offers the following benefits:

- Reduces travel to Family Court, thereby eliminating transportation barriers and the need to miss work or find childcare
- Eliminates barriers for people who are homebound or disabled
- Reduces delays in accessing legal services, particularly in counties with few pro bono resources

For pro bono attorneys, FLC enables them to volunteer from the convenience of their own offices at flexible times. FLC offers pro bono attorneys the following benefits:

- Improved ability to reach people in distant locations
- Meaningful client contact for junior associates
- Comprehensive training - no prior family law experience required

[Take our Survey](#)

## Model / Workflow

1. Client contacts LIFT via hotline or web services and prescreens for FLC's services
2. Program manager creates account login for qualifying, screened client
3. Client logs in to their LIFT FLC account to upload case documents before their appointment
4. Program manager reviews the documents submitted by client
5. If uploaded documents are complete, program manager schedules a consultation and assigns them a volunteer attorney
6. Program manager notifies the volunteer attorney of their upcoming appointment
7. Attorney logs into their FLC accounts to access their assigned appointments, review the client's uploaded documents
8. For the video-call, the client logs into their account, agrees to share their video/audio, and accepts the attorney's consultation
9. The attorney and client discuss the legal matter and next steps
10. Attorney consults with the LIFT attorney via live chat if they have any questions during consultations
11. After the virtual consultation, the client logs out of their LIFT FLC account. This is especially important if the client uses a public computer

## Checklist of Tools + Templates

- FLC login accounts for clients and volunteer attorneys
- Both clients and volunteer attorneys must have access to a computer or cell phone with camera/video capabilities and an internet connection
- Relationships with organizations that can provide client referrals
- Legal case management system for the supervising organization
- Limited scope engagement agreement
- Instructions for accessing Family Legal Connection, uploading documents and joining a video chat
- Common court forms for attorneys to fill out during consultations with clients
- Substantive law training materials
- Support for volunteer attorneys

Other organizations have partnered with Pro Bono Net to use the same technology to address problems in their communities. For more information about LIFT and Family Legal Connection, please contact LIFT or PBN: Samantha Ingram, Director of Pro Bono Programs, (646) 755-3467 or [singram@LIFTonline.org](mailto:singram@LIFTonline.org) or Jeanne Ortiz, Pro Bono Net's Pro Bono & Strategic Initiatives Manager, (212) 760-2554 or [jortiz@probono.net](mailto:jortiz@probono.net).

**Contributed by:**  
Sami Ingram, Esq.  
Director of Pro Bono Programs  
Legal Information for Families Today (LIFT)

Jeanne Ortiz-Ortiz, Esq.  
Pro Bono & Strategic Initiatives Manager  
Pro Bono Net

[Take our Survey](#)

# Project Profile: Montana Court Help Connect

## Overview

The Court Help Program is a free legal support program powered by the Montana Supreme Court that helps people with civil legal problems navigate the legal system. The program is a collaborative project of the Montana State Supreme Court's Court Help Program and Montana Legal Services Association (MLSA). The program provides legal forms and information to people who are handling their own cases. The Court Help Program operates full time self-help centers in Helena, Missoula, Great Falls, Kalispell, Billings and Bozeman, as well as many self-help stations and kiosks throughout Montana.

The Court Help Program was recently awarded a Legal Services Corporation's Technology Initiative Grant (TIG). It deployed videoconferencing technology at partner host sites for self-represented litigants living in locations without physical self-help centers. MLSA works with the Montana Supreme Court / Court Help Program to provide support at legal kiosks and Court Help Connect stations at various locations across Montana. Both provide links to legal information, forms, and resources to help users find answers to their legal problems. The Court Help Connect stations also allow users to video chat directly with trained AmeriCorps Members. These kiosks and stations help self-represented litigants with basic questions about filling out legal forms and the court process.

## Model/Workflow

1. An individual schedules an appointment at their nearest Court Help Connect station through the State Law Library.
2. The individual arrives at the partner host site for their Court Help Connect appointment.
3. Trained staff at partner host sites help set up the Court Help Connect station equipment if needed, and on additional resources to refer a litigant for more help.
4. The self-represented litigant uses the station to video chat, via Zoom, with a trained AmeriCorps Member, who can answer basic questions about legal forms and court process, including using screen-sharing to answer specific questions about a self-help resource, and refer the litigant to additional legal resources when necessary.

## Checklist of Tools

- Laptop
- Printer and paper
- Zoom video conferencing software
- Splashtop software for remote technical support
- User guide

### **Contributed By:**

Alex Clark  
Community Outreach Assistant  
Montana Legal Services Association

[Take our Survey](#)

# Project Profile: Montana Health Justice Partnership

## Overview

In October 2015, Montana Legal Services Association (MLSA), the Montana Primary Care Association, and four Federally Qualified Community Health Care Centers (CHCs) throughout Montana received a grant to form the Montana Health Justice Partnership. The partnership provides legal assistance to patients in some of Montana's most vulnerable communities, and helps solve legal issues that impact patient health – such as unsafe housing, family violence, and denial of earned benefits. The Montana Primary Care Association hosted a convening to educate and prepare partners for the June 2016 launch. Since then, the partnership has functioned by referring/liasing the health care center patients to MLSA for legal advice and short services. The partners received an expansion grant in 2017 to include two more clinics, bringing the total partners to eight. In early 2020, all 8 partners invested in the partnership program to make it self-sustaining.

## Model/Workflow

The process starts when patients enter a partner health care center. Their check-in form includes a basic legal services screening to determine whether the patient has legal needs or problems. The staff uses the MLSA's online screening tool or fax, to send the information. The goal for health centers is to screen each new patient when they arrive, and every regular patient annually.

MLSA maintains an online calendar for on-site care managers to schedule patient legal intake appointments while the patient is still at their medical appointment. The calendar helps MLSA refer patients for housing law, family law, wills and power of attorney, workman's compensation, etc., and to screen for Legal Services Corporation (LSC) eligibility. Patients are assigned to a legal department, depending on their issue. MLSA performs nearly all the services and support via telephonic consultations and virtual document review. Pro bono volunteers and attorney staff provide support.

## Checklist of Tools

- Intake form
- Fax machine or computer (for filing intake form)
- Limited Service Agreement
- Telephones (for conducting telephonic consultations and screening interviews)

## Early Learnings and Observations

### **Innovate, test, and move on.**

Some tech strategies or tools impede service delivery, if they don't resonate with partners or the community. Technology is shiny and new, but can deter potential clients if it is not used in informed ways.

[Take our Survey](#)

**Make information and materials available to clients as soon as possible.**

When the partnership first started, patients would leave the health centers without an appointment for followup from MLSA. This meant that many were never connected to MLSA. When the partnership began setting follow-up appointments at the health centers, patients could select times that they were available, and this increased the services' effectiveness.

**Contributed By:**

Kallie Dale-Ramos, Esq.  
Attorney - Montana Health Justice Partnership  
Montana Legal Services Association

## Chapter 4: Working with the Community

Organizations providing remote legal support to community members rely on different tools and workflows than traditional in-person services. For instance, a legal advocate may communicate with the potential client via email and phone before scheduling a consultation via videoconference. They may conclude services without ever meeting the client in person. Additionally, the remote service provider may rely heavily on the support and participation of an in-person community-based organization to fully serve the client's needs.

Establishing trust with clients, maintaining confidentiality, and managing expectations are critical in any legal services setting. These ethical obligations and considerations require special attention in a remote legal services setting. Each project should develop appropriate policies and procedures that take into account the scope and setting of the services provided.

### Trust

Applying for naturalization can be stressful for aspiring citizens. Many applicants have experienced difficult interactions with immigration officers, complicated life situations, and must reveal deeply personal information with service providers to complete their application. Effective remote legal support requires a high level of trust--trust by the applicant for the service provider and also trust by the legal service provider for their client. CBO's that are known, liked, and trusted by immigrants can play an influential role in referring naturalization applicants to remote legal support opportunities.

Service providers of remote legal support can build on this trust and establish trust with their clients by introducing themselves in a very approachable way, describing their service with concrete examples, and establishing rapport before asking the applicant to sign legal documents. Videoconferencing can also be a valuable tool when communicating with clients, especially for collecting sensitive personal histories. Seeing each other on camera and sharing nonverbal cues can help the parties establish trust and promote open communication.

### Confidentiality

In several of the RLS models included in this manual, the first point of contact for individuals seeking legal services is a community-based organization (CBO) or other non-legal entity. That organization may have collected significant personal information from the prospective client before providing the referral to the legal services provider. In some cases, a nonlegal CBO may continue to work closely with the legal staff for the duration of the client's case.

The legal service provider has a duty to keep client communications and information private from the referring organization and any third party unless the client provides written

[Take our Survey](#)

consent. Also, depending on the third party and the purpose of the third party's participation in the communications, the client should also be advised on how it may impact attorney-client privilege. Unless the third party is necessary to the client's legal assistance, the best practice is to maintain a firewall between client information and other parties.

Legal advocates need to incorporate procedures into remote services workflows to protect client confidentiality. Projects that rely heavily on videoconference should confirm with clients that they have access to a private space away from family and friends. If the client can access the technology only at public resources, like libraries and community centers, they may be hesitant to share their story. In addition, legal staff should ensure that they are communicating with clients from environments that encourage information sharing. A remote client who has never met the attorney providing legal review before may not feel comfortable sharing sensitive criminal history if the legal staff is in an open space and if the client is able to see other people in the background during the videoconference session. Finally, legal advocates should consider communication tools that offer end-to-end encryption and other security features.

## Expectations

The best practice is to manage client expectations at the earliest interactions and reinforce expectations at different stages of the remote and limited scope assistance. If a partner nonlegal CBO is the first contact for a client, they should communicate the scope of services that the legal services organization provides. Once the client is referred, the legal staff should communicate the same information and review the written limited scope agreement with the client, to confirm their understanding.

A clear and simple limited scope service agreement lays out the roles and responsibilities of the client and the legal services provider. Clients need to understand what services will be provided and when the services are completed. (See the [sample limited scope service agreement](#) in the [Appendix](#).)

No matter the communication technologies or workflow, staff and volunteers must ensure confidentiality and meet professional standards for providing legal services or support. By working with local partners, and paying attention to what makes their clients more comfortable, they can build the trust they need for the best possible experience and outcome.

**Contributed by:**  
Carolyn Kim, Esq.  
Project Director  
Asian Americans Advancing Justice - LA  
New Americans Campaign Virtual Review Partner

[Take our Survey](#)

# Chapter 5: Working with Volunteers

Working with remote volunteers on a Remote Legal Support (RLS) program presents unique challenges. Managing volunteers at a physical distance can make communication, supervision, and support for RLS teams difficult. This chapter describes the project structure and lessons learned for the Remote CFI Prep Project (Delivery Models Section) developed by the Feerick Center for Social Justice and the Dilley Pro Bono Project ("Dilley Project"). The Remote CFI Prep Project was developed to deliver critical legal services and support to individuals in need, while providing structure, support, training, and supervision to the volunteers. The project works with volunteer lawyers and legal assistants to prepare detained asylum seekers at the South Texas Family Residential Center in Dilley, Texas for their Credible Fear Interviews (CFI).

## Volunteer Recruitment

Good recruitment materials set clear expectations of participants and describe the supervision and training that will be provided. Important details to identify for potential volunteers include:

- The length of the volunteer commitment
- Important dates and times
- The training that will be provided prior to the project
- The supervision available during the project
- The scope of volunteer responsibilities, including guidance on if, when, and how project staff will support volunteers

Recruitment materials can include the skills needed (i.e. language proficiency), whether any experience is helpful or required, and a request for a resume or references. If an organization's focus is serving clients who do not speak English, additional volunteer screening may be needed to assess language proficiency. For volunteer lawyers, recruitment materials may include information on substantive law and the scope of legal services.

The Remote CFI Prep Project recruits former on-the-ground volunteers of the Dilley Pro Bono Project, who have a general understanding of volunteer responsibilities and expectations. However, project staff have found it useful to be as specific as possible in recruitment materials.

## Volunteer Training

Volunteer training is critical to the success of a remote volunteer project. Substantive legal and logistical training modules help volunteers understand legal issues and use

[Take our Survey](#)

technology to connect to clients. For the Remote CFI Prep Project, all trainings occurred remotely, and each volunteer was required to attend all scheduled trainings.

The technology training uses pre-recorded videos on how to log in and access the various Google-suite functionalities and Dialpad, our cloud-based phone service for calls with clients. This is followed by a conference call to review the technology training and troubleshoot issues. Each volunteer watches the technology training videos and attempts to access all necessary technology before the conference call. The majority of the training call focuses on reviewing the technology components of the project, and making sure volunteers can access and use the technology easily.

The substantive legal trainings are done via conference call with a powerpoint presentation for reference. These trainings include a review of the procedural posture of cases, law and strategy, and a review of best practices for working with survivors of trauma in a cross-cultural setting. The bulk of these legal trainings are in a lecture/presentation format, with volunteers encouraged to ask questions. The project staff plans to develop additional training materials such as quizzes to test volunteer knowledge, and self-learning training modules, to vary the format for training and testing comprehension.

At the end of the substantive legal training, the volunteers and Legal Supervisor review together the CFI prep Checklist Form, a screening tool for volunteers to capture client information during the CFI prep. The Legal Supervisor reviews the questions and in-form guidance with volunteers to confirm understanding and answer questions.

Another important requirement in working with remote volunteers is ensuring that client information is confidential. All volunteers sign a confidentiality agreement before they can participate in the project. They are trained on the practical application of the agreement for the work and the remote service model. See the [Sample Volunteer Confidentiality Agreement](#) in the [Appendix](#).

## **Volunteer Supervision**

Adequate volunteer supervision is a key component of an RLS program. A strong supervision structure encourages potential volunteers to apply for remote opportunities. It also helps volunteers feel supported, promotes efficiency by reducing the need for in-person client follow up, and provides an opportunity to identify and avoid potential problems.

In the Remote CFI Prep Project, volunteers dedicate between 2-3 hours on a specific day and time of the week to work with clients. A remote Legal Supervisor is on call and available to the volunteers while they are providing remote services to a client. Volunteers can speak directly with the Legal Supervisor via Google-chat. The online chat functionality allows easy and efficient communication. Volunteers with simple or brief questions can get answers without

[Take our Survey](#)

waiting to speak directly with a supervisor over the phone. The Legal Supervisor can manage various conversations at the same time. For example, they can request clarification from one volunteer while responding directly to another. If a direct conversation with the Legal Supervisor would be more effective, volunteers can place the client on hold and connect with the supervisor on a separate phone line. The supervisor's role is kept manageable by limiting the number of volunteers to eight at a time.

The volunteers use the CFI prep Checklist Form with built-in prompts and guidance for preparing clients. Volunteers must complete a task before moving onto the next section. For example, under the “Build Rapport and Reiterate Confidentiality” Section, volunteers must complete the following tasks before progressing: “(1) introduce themselves to the client and explain their role; (2) remind the client that the conversation is confidential and won’t be shared outside the organization; (3) check in with the client and confirm that she feels comfortable proceeding; (4) ask the client if she has any questions before beginning.” Small checklists like this enable project staff to ensure volunteers are performing the right tasks.

The Checklist Form seeks to ensure that legal supervision is provided when necessary. When certain responses are selected, the forms prompt volunteers to consult with the on-call supervisor. The supervisor provides guidance as needed for more complicated cases.

In addition to providing on-call support, the Legal Supervisor reviews the volunteer's work on each case. The Checklist Form requires volunteers to input the information to assess the client's claim into one centralized location. Google technology gives the Legal Supervisor immediate access for review. The Legal Supervisor can follow up directly with the remote volunteer via chat to request clarification or offer guidance on additional fact-gathering and client preparation. This increases project efficiency by reducing follow-up with remote volunteers outside the scheduled prep time, or with clients following the prep session. Volunteers report feeling more supported and confident because the Legal Supervisor checks their work before they finish prep with the client.

## **Volunteer Feedback**

Soliciting volunteer feedback during a RLS program is important to gain insight into the volunteer experience and consider modifications to improve the program. Throughout the Remote CFI Prep Project, project staff encourage volunteers to communicate their questions or concerns openly. The project solicits formal feedback at two points in the remote project. Mid-way through their commitment, volunteers answer a survey on the training materials, use of technology, contents of the Checklist Form, and support/supervision model. At the end of the remote project, project staff hosts an hour long debrief call, where volunteers can reflect on the project and provide more feedback. Their survey and debrief responses help project staff make changes to address concerns and improve training and support.

[Take our Survey](#)

## Conclusion

Given the decentralized nature of RLS programs, the recruitment, supervision, and support of remote volunteers is important. Training and supervising volunteers dispersed across the community, country, or globe presents unique challenges. Through its work with the Remote CFI Prep Project, the Dilley Pro Bono Project and the Feerick Center for Social Justice have identified some best practices for remote volunteers. Well-defined expectations and transparency about training, supervision, and feedback help in volunteer recruitment. Reliable and on-demand guidance helps to support the volunteer's role on remote projects. Additionally, sporadic and structured volunteer feedback helps improve RLS models to better serve both volunteers and clients. As more RLS projects are created, best practice in working with volunteers will continue to evolve.

**Contributed by:**

Cindy Woods, Esq.  
Staff Attorney, Family Detention Project  
Texas RioGrande Legal Aid (TRLA)

## Appendix:

(Click the descriptions below to find out more)

### **Citizenshipworks: A Remote Legal Support Tool**

- [Using Citizenshipworks to Create an RLS Program](#)

### **Sample Documents:**

- [Remote CFI Prep Pilot Project Volunteer Agreement - Dilley Pro Bono Project](#)
- [Sample Limited Service Agreement - Asian Americans Advancing Justice - LA](#)

### **Additional Resources (external links):**

- [Best Practices for Working With Volunteer Pro Bono Attorneys - Legal Aid Association of California](#)
- [California Pro Bono Best Practices Guide - OneJustice](#)
- [Legal Aid Tech Toolkits - Legal Services Corporation](#)
- [Rural Pro Bono Delivery: A Guide to Pro Bono Legal Services in Rural Areas - ABA Rural Pro Bono Delivery Initiative](#)

# Citizenshipworks: a Tool for RLS

[Citizenshipworks](#) is a tool developed by Pro Bono Net. It is designed for workshops, individual use, one-on-one services, and Remote Legal Support (RLS). It is an easy way for an organization to experiment with RLS:

- Clients or community members fill out their citizenship application online, at their convenience.
- Any community based organization can use Citizenshipworks. It does not require legal expertise.

## How it Works

The applicant uses a pre-screening interview on [www.citizenshipworks.org](http://www.citizenshipworks.org), to learn if they meet the basic requirements for citizenship. To continue with the application, they open a free account and answer the questions that fill out the form. The account is a secure way to store their information, so they can fill out the form over time. In addition, the Citizenshipworks interview breaks the 20+ page application form into manageable sections that make sense and are easier to complete. It offers information to help people understand the questions and process. It "flags" answers that may require legal help, and connects applicants to nonprofit legal experts.

## Outcomes

- Some applicants fill out the entire form on the Citizenshipworks platform on their own, and have a "clean" application to print and mail to the USCIS.
- Others fill out all or most of the form, but have questions about how to send it, or other logistics. These applicants may work with nonlegal and legal organizations, volunteers, or lawyers to understand the process.
- Some applicants have legal questions, or "red flags" (potential complications) on their application. Citizenshipworks or the CBO helps them connect to nonprofit legal experts.

## Program Options

Nonprofits join the Citizenshipworks partner network, or they use the tool "ad hoc." Partners get training and technical support. Applicants may grant partners access to their online applications, for offsite or in-person help with the forms.

For community based (nonlegal) organizations:

- CBOs conduct outreach or host information / application sessions, to encourage people to apply for citizenship. With Citizenshipworks, the CBO does not need staff lawyers to help people apply. And people can work on their application in an office or at home.

For legal service organizations (LSOs):

- LSOs conduct outreach or presentations on how to become a citizen. They encourage people to get started on the CW platform. The LSO may hold follow up events or

[Take our Survey](#)

appointments to provide additional legal guidance or review for applicants who have questions.

For partnerships:

- Community based nonlegal and legal organizations can work together, using Citizenshipworks to create a holistic program with
  - Outreach and mobilization
  - Connection through trusted community organizations
  - A free, convenient, and safe application tool
  - Nonprofit legal expert help with more complicated cases.

To become a partner, or learn more, contact: [support@citizenshipworks.org](mailto:support@citizenshipworks.org)

**Contributed by:**

Patricia Malone  
Associate Director of Immigration Advocates Network  
Pro Bono Net

# Remote CFI Prep Pilot Project Volunteer Agreement

- 1. Remote CFI Prep Pilot Project.** The Dilley Pro Bono Project (DPBP) provides limited- and full-scope legal services to asylum-seeking women with children detained at the South Texas Family Residential Center (STFRC) in Dilley, TX. The Remote CFI Prep Pilot Project serves to complement DPBP's on-the-ground presence at STFRC by increasing its capacity to assist clients. The pilot project connects detained women with highly-trained and experienced, remote volunteers, who prepare them for their Credible Fear Interviews telephonically.
- 2. Scope of Legal Services.** Project volunteers will provide Credible Fear interview preparations, free of charge, to clients over the phone. Volunteers will not represent clients at their Credible Fear Interviews or provide any follow-up preparation.
- 3. Professional Conduct and Ethics.** Project volunteers will treat clients, clients' family members and sponsors, Project staff, and other volunteers with respect in all communications, including those by phone, email, and chat. Volunteers will also accurately identify themselves to clients as either lawyers or legal assistants and maintain competent and diligent limited-scope representation. Additionally, volunteers will ensure that clients understand the limited nature of their representation.
- 4. Duty of Confidentiality.** Project volunteers acknowledge that they are fully aware of the confidential nature of their positions and obligations to clients and Project staff to safeguard the information with which they are entrusted, and to release such information only with the authorization of Project staff. This includes the duty to protect all documentation related to current and former clients as well as Project materials, passwords, and communications. Volunteers further understand that it may be a breach of confidentiality to:
  - discuss client matters anywhere such information could be overheard;
  - discuss client identifiable information with anyone not employed by the project without authorization;
  - carelessly send correspondence of a confidential nature so that it may be inadvertently directed to a third party;
  - maintain work areas in such a way that unauthorized persons might obtain confidential client information;
  - tell anyone including a purported relative or other person purportedly acting on the client's behalf any information including whether or not the client is represented by the Project or whether or not certain legal steps are being taken or not on behalf of the client without the client's express verbal authorization;
  - comply with an official sounding request from a third party to provide any client information including whether or not the client is represented by the Project or whether or not certain legal steps are being taken by or on behalf of the client; or
  - release client documents to anyone other than the client, except as consented to by the client.

Any breach of confidentiality could be injurious to the Project's clients and may be grounds for disciplinary action. Therefore, Project volunteers pledge that they will strictly maintain all client information confidential that comes to their attention and that upon the expiration or termination of their volunteer term, they will never reveal any such confidential information unless specifically authorized and directed to do so by appropriate Project staff.

5. **Volunteer Term and Commitment.** Project volunteers will commit to volunteer for a 10-week period beginning on October 1, 2019, and ending on December 3, 2019. During this period, volunteers will commit to a regular, three-hour shift each week and complete one remote prep. This shift will take place on Tuesdays from 1-3 p.m. CST. Volunteers agree to avoid cancelling shifts to the greatest extent possible and to do so only in exigent circumstances as to ensure adequate access to counsel for detained individuals. Volunteers may miss up to two shifts with advance notice.

Project staff may be required to cancel volunteer shifts on short notice due to sudden changes in the detention center population or unforeseen circumstances. If the Project needs to cancel volunteer shifts, the project will make every attempt to provide volunteers with at least 24 hours notice. The Project requests flexibility from volunteers and an understanding that conditions on-the-ground can change rapidly.

6. **Training.** Project volunteers agree to complete all required preparatory training prior to the start of their volunteer term to ensure knowledge of the Credible Fear standard, current conditions, and Asylum Officer practices on-the-ground, including watching webinars and reviewing written materials. Volunteers must also be familiar with the information contained in the Volunteer Manual and policies and procedures related to the Project. Additionally, volunteers agree to complete all required ongoing training, which may include additional webinars, written practice updates, and other materials.
7. **Technology.** Project volunteers agree to use all technology required for the pilot project. Volunteers will have access to a reliable Internet connection, cell phone or landline phone, and a computer during their shift.
8. **Supervision.** Project volunteers will report to the On-Call Supervisor during their shift if they have any questions or concerns. Volunteers will always seek help from the Supervisor if needed to ensure that clients receive competent, high-quality, limited-scope legal services. All cases will be reviewed by the Supervisor before the end of the session and volunteers will follow any instructions provided by the Supervisor.
9. **Record-keeping and Notes.** Project volunteers will take detailed and thorough notes during each non-refoulement interview preparation using the Remote CFI Prep Checklist form and additional documents as necessary. Volunteers will ensure that the form and all related notes have been submitted before signing off at the end of their shift.

[Take our Survey](#)

10. **Volunteer Reviews.** Project volunteers will receive feedback from Project staff at least once during the term of their volunteer commitment. Volunteers will carefully review feedback to improve the quality of services provided to clients.

11. **Feedback Surveys.** Project volunteers will complete periodic feedback surveys in a timely manner to provide information to Project staff to further improve the pilot project.

I have read the above Remote CFI Prep Pilot Project Volunteer Agreement and understand its terms and my responsibilities as a volunteer.

---

Signature of Volunteer

---

Date

---

Printed Name

# Sample Limited Service Agreement – AAAJ-LA

## I understand and agree to the following:

1. Asian Americans Advancing Justice – Los Angeles' (AAAJ-LA's) assistance is limited to review of my application for naturalization (N-400) through the online platform Citizenshipworks. AAAJ-LA is not representing me in any capacity.
2. AAAJ-LA is not responsible for any outcome or decision made by the United States Citizenship and Immigration Services (USCIS) in connection with my application for naturalization.
3. I am responsible for paying all USCIS filing fees, mailing all forms, meeting filing deadlines, preparing and appearing for any USCIS interviews in connection with my application for naturalization.
4. I am responsible for providing information and documents that are true, accurate, complete, and current to the best of my knowledge. AAAJ-LA's accurate assessment of my eligibility for naturalization depends on the accurate information that I provide. Specifically, if I fail to provide accurate information regarding my immigration history, failure to pay taxes, and interactions with law enforcement, including any arrests, citations, detentions, and convictions in and outside of the United States, USCIS may deny my application for naturalization and possibly refer me for deportation. If I provide false information, I may also expose myself to criminal and other liability.
5. Authorized AAAJ-LA staff are licensed attorneys or authorized representatives in the state of California. I understand that AAAJ-LA may only be able to assess state-related legal issues for the state of California and federal immigration law. If I have any state-related legal issues in connection with my eligibility for naturalization that arise outside of the state of California, AAAJ-LA may not be able to review fully my application for naturalization.
6. AAAJ-LA may decline assistance in reviewing my application for naturalization if my case is not within the scope of their legal services or for any other reason.
7. AAAJ-LA may discontinue assistance if:
  - a. Authorized AAAJ-LA staff determine that I am ineligible for naturalization;
  - b. I fail to provide AAAJ-LA with requested information and/or documents to assess my eligibility for naturalization; and/or
  - c. I am unable or unwilling to complete my Citizenshipworks application as requested by AAAJ-LA.
8. I agree to give AAAJ-LA permission to access my Citizenshipworks account and contact me through my account, by email, and by phone. I also agree to give AAAJ-LA permission to share with Citizenshipworks limited information about whether my case is pending or closed with AAAJ-LA. Citizenshipworks may follow-up with additional messages.

[Take our Survey](#)

9. I can terminate this agreement at any time.

---

Name (printed)

---

Signature

Date

## Contributors:

Pro Bono Net is grateful for all of its partners that helped compose this manual.



**Dilley Pro Bono Project**

A Project of the Immigration Justice Campaign



[Take our Survey](#)

## Partners:

Pro Bono Net is also grateful for its partners that provided additional guidance and input:

