



### **Meeting Minutes**

January 19, 2024, 10:00 a.m. ET

Indiana Statehouse Supreme Court Conference Room and Zoom

Members Attending: Justice Slaughter (Chair), Jon Laramore, Hon. Melissa May, Kerry Hyatt Bennett, Jean Blanton, David Van Gilder, Emily Weikert Bryant, David Pruitt, Hon. Charles Todd, Monica Fennell, Hon. Elizabeth Taviton, Scott Barnhart, Carolyn Clay Hall, Traci Cosby, Victor Quintanilla, Michael Tolbert, Hon. Stephanie Steele, Charles Dunlap, Adam Mueller

Guests and Staff Attending:

Jewel Patterson, Jason Thees, Mike Commons, Abbie Bush, Bob Rath, Judy Fox, Christine Cordial, Kyla Moore, Cathrin Verano, Carl Pebworth, Phyllisia Gant, John Althardt, Whitley Wynns, Cynthia Baker, Margaret Jones, Nick Parker

Justice Slaughter called the meeting to order at 10:00 a.m. and the minutes from October 20, 2023, were approved unanimously with one correction to show Coalition member Monica Fennell attended that meeting.

Justice Slaughter reminded Coalition members to please join a work group. Members are encouraged to join at least one work group. A list of work group descriptions was provided with the meeting materials.

Justice Slaughter announced the relaunch of the Advocacy work group. The Advocacy work group was originally formed in June 2021. The stated purpose of the work group is to make recommendations, and review and support proposals from other Coalition work groups and outside sources on rules, policies, and procedures that improve the availability and quality of civil legal services to people of limited means in Indiana. The work group met through June 2022 but has since been inactive. Jon Laramore, who was the original chair of the work group, has agreed to serve as chair again.

Chuck Dunlap provided updates from the Indiana Bar Foundation, including:

- This month, the Foundation distributed approx. \$2M in grants from CLAF and IOLTA to civil legal aid organizations around the state and IOLTA revenue remains strong due to the current interest rate environment.
- June 21, 2024, will be the Foundation's annual awards luncheon. Justice Slaughter will be honored as the recipient of the Champion of Civil Legal Assistance award.
- The Foundation continues to operate under the \$13.1M housing stability legal services contract with IHODA, which expires on 12/31/24. The Foundation has recently contracted with Lawrence Township Small Claims Court to provide court navigations in seven of the nine Marion County small claims courts. In addition, the Marion County,

City of Indianapolis TAP program will be funded under the Foundation's contract in 2024.

Prof. Victor Quintanilla provided an update from the Data Collection work group. The "Accessing Justice with Zoom: Experiences and Outcomes in Online Civil Courts" report continues to receive both local and national recognition. Chief Justice Rush acknowledged the report during her State of the Judiciary remarks on January 10. The work group is now exploring ways to use and build upon self-represented litigant data and work with the judges who participated in the study to highlight best practices and better understand what additional data and information they might find helpful.

Carolyn Clay Hall provided an update from the Pro Bono work group which currently centers around the activities of the Pro Bono Engagement Project Team. This project team was formed to work on recommendations from the 2022 pro bono retreat. In December, the project team met for a full day session to organize the feedback received from interviews and focus groups with attorneys and organizations coordinating pro bono. Working themes include motivators, recruitment, training and support, and recognition. The project team plans to present final recommendations to the Coalition in April.

Judge Melissa May provided an update from the Rural Legal Services work group. She will be presenting on the use of remote hearings at the April judicial conference. During her listening tour with rural judges in 2022, she received mixed responses from judges about remote hearings. Some judges expressed that they like to see people in person and feel like they want to get back to pre-COVID practices. It is important to have person-to-person discussions with judges to encourage flexibility and highlight the benefits of remote participation and representation.

Jon Laramore described the process used in Monroe County eviction hearings where all parties are remote. Tenants can speak with remote attorneys in Zoom breakout rooms and both parties meet with a facilitator to try to reach a settlement agreement before a contested hearing is scheduled.

Judge May also reported on work she has been doing with Judge Kim Dowling and Steve Badger with Barnes and Thornburg on a potential rule change around unbundling and limited scope representation. Benchmarking has been done looking at rules and processes in Colorado as a potential model. Rule changes need to consider both rural and urban settings. Clear guidance, the development of resources, and training will need to be provided to facilitate the use of limited scope appearances. The Rural Legal Services work group along with support from the Advocacy work group will take this initiative forward and report back to the Coalition on progress.

Judge Stephanie Steele provided an update from the Self-Help and Court Access work group which met in October to discuss:

- Changes to the Waiver of Service forms which were initiated by requests from judges.

- Ongoing form updates to improve usability by changing fonts, adding icons, and imbedding instructions.
- Processes to keep forms and materials up to date with statutory and case law changes by engaging subject matter experts to help review forms.
- Participation in the Stanford Law School Filing Fairness Project by Foundation and OJA staff members to create a process for seamless e-filing from guided interviews on the ILH website directly into the court's Odyssey case management system.

Guest presenter Prof. Judy Fox presented an overview of the findings of court observations conducted in St. Joseph County which have led to a proposed change to Small Claims Rule 3. From May – October 2023, 655 eviction cases were observed with 64 variables coded using in-person notes and MyCase data. Demographic information, statistics on representation, application of laws, and hearing processes and dispositions were recorded. Some findings included that people evicted were more likely to be non-white, African American, single mothers and that high case volumes and limited resources resulted in 67% of eviction hearings lasting less than 5 minutes.

Prof. Fox's proposed rule change specifically addresses notice requirements. The current rule does not set out a minimum notice requirement. The rule change proposal requires 21 days' notice. In her observations, the tenants who showed up to court typically had between 14-21 days' notice. Most people in study got 13 days' notice. It is not uncommon for civil legal aid organizations to need at least two weeks to screen, intake, and help a tenant. Tenants also need time to make arrangements with their jobs, childcare, etc. to make sure they can attend their hearing.

Prof. Fox also shared a summons she uncovered in Elkhart County requesting tenants attend a pre-eviction settlement conference at the office of the landlord's attorney. Sample materials presented include language that tenants are to bring witnesses and provide counterclaims to make their case and risk a default for not attending the settlement conference.

Adam Mueller provided an overview of a proposal for Marion County Small Claims Court Rules (LR490SC00-406 & LR49-SC00-407) to include an initial hearing requirement with 20 days' notice after service of the Notice of Claim and language regarding automatic sealing of an eviction if the plaintiff files a motion to dismiss an Eviction case. This proposal was presented to Marion County judges in January.

Remaining FY 2024 meetings – at 10:00 a.m. ET:

April 19, 2024 at Taft Law, Indianapolis

The meeting was adjourned at 11:54am.



### **Meeting Minutes**

April 19, 2024, 10:00 a.m. ET

Taft Law Hub Conference Room and Zoom

Members Attending: David Van Gilder (Vice Chair), Hon. Melissa May, Emily Weikert Bryant, Monica Fennell, Joe Skeel, Traci Cosby, Scott Barnhart, Charles Dunlap, Hon. Charles Todd, Jean Blanton, David Pruitt, Carolyn Clay Hall, Hon. Elizabeth Tavitias, Alex Van Gorp, Kerry Hyatt Bennett, Jon Laramore

Guests and Staff Attending: Abbie Bush, Mike Commons, Bob Rath, Christine Cordial, Phyllisia Gant, Carl Pebworth, Jewel Patterson, Nick Parker, Cathrin Verano, Olivia Cooley

David Van Gilder called the meeting to order at 10:00 a.m. and the minutes from January 19, 2024, were approved unanimously.

Christine Cordial, Director of Justice Initiatives at the Indiana State Bar Association provided an overview of the Association's access to justice task force. This task force is focused on addressing the attorney shortage in Indiana and gathering practitioners' perspectives in the areas of pathways to admission, alternative licensure and practice models, and increasing representation in rural areas. A series of meetings will be conducted through June to evaluate what other states are doing and consider ideas that could be implemented in Indiana. Recommendations from the task force will be used to facilitate discussions with the larger ISBA membership at the annual summit in October with outcomes informing ISBA's strategic plan.

Abbie Bush provided updates from the Indiana Bar Foundation, including:

- The Foundation board has approved a plan to sustain the Indiana Legal Help program (website, help desk, and kiosks) into the future. This program was expanded extensively through the Foundation's housing stability contract with IHCD, and the board is committed to continuing the new features after the end of the contract term.
- The Indiana Legal Help Desk has opened live phone calls. This is a soft launch with four navigators trained and available to take phone calls during help desk hours on Mondays and Tuesdays.

Carolyn Clay Hall provided an update from the Pro Bono work group including a final report from the Pro Bono Engagement Project. Formed to work on recommendations from the 2022 pro bono retreat, the Pro Bono Engagement Project team conducted interviews and focus groups during Fall 2023 to identify ways to deepen engagement and expand Indiana's pro bono system. The perspectives of organizations coordinating pro bono and individuals doing pro bono yielded recommendations to create a new state-wide online platform for pro bono with resources for organizations coordinating pro bono, training materials for attorneys such as on-

demand CLEs, and the Pro Bono Opportunity Guide. After a partner is selected to create, develop, and maintain the new pro bono platform, the Pro Bono work group will focus on sourcing and developing content and will oversee efforts of the Indiana Bar Foundation to identify ways to provide funding assistance to solo and small-firm attorneys to help with administrative costs incurred on pro bono cases.

Jon Laramore provided an update from the Advocacy work group. The newly reinstated work group has created the following mission statement:

*The Advocacy work group will address issues referred to the work group by its members, other CCA members, or individuals or entities outside CCA. It will vet these issues through a lens of access to courts/justice and recommend informal resolution, formal statement under Administrative Rule 4(A)(10)(a)(i) or other applicable authority, or another appropriate outcome.*

The work group is currently reviewing ideas for unbundling rule changes and rule changes related to evictions with likely recommendations to the CCA this fall. The work group is also open to considering whether and how lobbying might be part of their efforts.

In Victor Quintanilla's absence, Bob Rath provided an update from the Data Collection work group. During their past two meetings, the work group has heard updates from Victor Quintanilla on a second phase of the study of self-represented litigant experiences with remote hearings. This phase is focused on creating learning communities of judges and continuing data collection and analysis. Experience sampling will begin again to support this effort and will be used to help judges assess the impact of changes they are making in regard to remote hearings. In addition, the work group has discussed ways to help judges address barriers to providing more remote hearings.

Judge Melissa May provided an update from the Rural Legal Services work group. She conducted a seminar at the spring judicial conference regarding remote hearings and the findings from Victor Quintanilla's report on self-represented litigant experiences with remote hearings. The presentation also included information on technology grants available to judges through the Indiana Office of Court Services and perspectives on "good cause" as referenced in Interim Administrative Rule 14.

Judge May and Judge Felts will be traveling to select rural counties to meet with judges to talk about their experience and perspectives on remote hearings.

An ad hoc group with members from the Rural Legal Services and Advocacy work groups along with other interested parties has continued to meet to draft a proposed rule change related to unbundling. Updates will be provided to the CCA at upcoming meetings.

In Judge Stephanie Steele's absence, Abbie Bush provided an update from the Self-Help and Court Access work group. The Foundation continues to make plain language and usability

updates to forms along with minor changes including an update to reflect the 6% rule change in various family law packets. Legal subject matter experts have been engaged in review of specific family law packets to ensure they reflect current law and practice.

SHACA members will be reviewing commonly used forms (such as the continuance, contempt, appearance, filing fee waivers, etc.) on Indiana Legal Help to ensure they are still accurate. Plain language changes to these forms will follow.

Bob Rath provided an update from the Supreme Court Innovation Committee. In February 2024, at the request of Committee Chair Justice Molter, several civil legal aid partners were invited to present on opportunities for improvement within the scope of the Innovation Committee. Since the meeting, the Innovation Committee has been investigating a policy change related to the ability to bring cell phones to court, proposed changes to allow attorneys who have passed the bar and met other requirements to practice law under the direction of specific organizations prior to swearing in, better guidance to judges on the use of remote hearings, a proposed change to the appearance form to facilitate the gathering of cell phone numbers for text message reminders, rule changes related to the acceptance of forms made available on Indiana Legal Help, and guidance for judges on the difference between eviction and ejectment.

David Van Gilder recognized the following outcoming coalition members whose terms expire as of June 30, 2024.

- Hon. Melissa May
- Carolyn Clay Hall
- Michael Tolbert
- Emily Weikert-Bryant
- Victor Quintanilla

In FY2025, the Coalition plans to meet quarterly in July or August, October (annual meeting), January, and April. Meeting dates and times are to be determined.

Thank you to Monica Fennell and Taft Law for hosting us today.

The meeting was adjourned at 11:32am.



### **Meeting Minutes**

November 8, 2024, 10:00 a.m. ET

Indiana Court of Appeals Conference Room and Zoom

Members Attending: Hon. Geoffrey Slaughter (Chair), Chuck Dunlap, Joe Skeel, Monica Fennell, Hon. Stephanie Steele, Patricia Kinney, Zechariah Banks, David Pruitt, Jean Blanton, Scott Barnhart, Samantha Chapman, Jon Laramore, Adam Mueller, Traci Cosby, Hon. Charles Todd, Alex Van Gorp

Guests and Staff Attending: Bob Rath, Abbie Bush, Mike Commons, Carrie McCully, Nicole Kiker, Kristina Coleman, Cynthia Baker, David Sneden, Phyllisia Gant, Scott Wylie, Bryan Fisher, Margaret Jones, Carl Pebworth, Andrew Merkley, Jason Thees

Justice Slaughter called the meeting to order at 10:01 a.m. and the minutes from August 9, 2024, were approved unanimously.

As this is the Coalition for Court Access Annual Meeting, Justice Slaughter notified members that David Van Gilder was nominated for a one-year term as Vice Chair of the Coalition and Traci Cosby was nominated for a one-year term as Secretary of the Coalition and asked for additional nominees. Receiving none, David Van Gilder was unanimously approved as Vice Chair and Traci Cosby was unanimously approved as Secretary.

Carrie McCully, Deputy Director, Civil Justice, Inc. and Nicole Kiker, MD Justice Passport Program Manager, Civil Justice, Inc. gave a presentation on the Maryland Justice Passport project. The project was started in Maryland in 2020 to help litigants navigate the network of legal aid organizations across Maryland's 23 counties and facilitate smoother referrals for litigants. Passports are created online by Marylanders with help from court self-help centers or legal aid partners. Individuals can also apply for a passport on their own. Each passport contains a curated case/issue summary with the ability to also upload relevant documents such as pictures, legal documents, or intake information. Organizations that participate in the Maryland Justice Passport maintain contact and service information in the passport portal and can receive direct referrals by having passports of potential clients sent directly to the organization based on legal issue and location. Organizations that receive direct referrals, called "ping partners", proactively reach out to litigants referred to them. If an organization is not a ping partner, potential clients see information about the organization in the portal so they can make an informed decision about who to reach out to for legal help. Potential clients can still share passport information with an organization even if that organization isn't a ping partner.

The Maryland Justice Passport is free to all individuals and organizations. Since its launch, there have been 2,500 passports created, 70 participating organizations, and 28 legal and non-legal

aid ping partners that receive automatic access to referred passports and proactively reach out to potential clients. During the last quarter, over 60% of individuals using the passport either got services or were pending with an organization.

Through questions from Coalition members, presenters shared that the intake process for participating organizations varies, and organizations can include in their profile the specific information they require before they can accept a referral. The Maryland Justice Passport is not intended to serve as a coordinated intake tool.

Members of the Coalition also asked questions about the type of information litigants can upload into the portal, who has access to this information, and how attorney/client privilege is waived or impacted by the sharing of information through the portal between litigants, legal aid organizations, and others who are provided access to someone's passport who is not a legal aid provider (for example, a family member).

Chuck Dunlap provided updates from the Indiana Bar Foundation, including:

- The National Center for State Courts (NCSC) is interested in partnering with several states, including Indiana, on an AmeriCorps grant that would place full-time and part-time resources in existing court self-help centers. NSCS will apply for a grant in January 2025, and if awarded, will oversee administration of the grant. In Indiana, we plan to request resources for the Vanderburgh County and Delaware County court self-help centers. Awards will be announced in Fall 2025.
- In addition to general operating grants, the Indiana Bar Foundation board has approved IOLTA special projects grants to support the following:
  - An updated economic impact study. The previous study from 2017 showed a return on investment for civil legal assistance at \$6.70 for every \$1 invested.
  - Disaster legal services. This effort will include coordination of bar association and legal aid organizations to create a disaster legal services plan that includes training, pro bono, and the deployment of up to two justice buses that can be used in the event of disasters and to provide legal resources around the state.
  - Pro bono engagement website. Following the Pro Bono Work Group recommendations approved by the Coalition in June 2024, the Foundation will issue a request for proposal for a pro bono website to connect attorneys to pro bono opportunities, house CLE/training materials, and support organizations that coordinate pro bono opportunities. The website will take several resources that already exist and consolidate them into a single location.
  - State-wide civil legal aid delivery system mapping. This mapping exercise will help identify gaps in service coverage and will help assess needs and opportunities for legal aid providers and other partners.
- The Foundation is in early discussions with Ivy Tech and IHCD regarding the placement of legal help booths at Ivy Tech campuses around the state. The booths will include access to IndianaLegalHelp.org and can be used for remote hearings and virtual meetings with attorneys. There are also opportunities to engage Ivy Tech students to



enhance their educational experience. About 12-15 campuses are interested.

- In the upcoming legislative session, the Foundation intends to pursue an update to the Civil Legal Aid Fund (CLAF) statute to remove the existing distribution formula and amend language around lobbying, extend the pro bono filing fee (\$1 per filing), and make a clarification to language in the Unclaimed Property Act related to the Rules of Professional Conduct Rule 1.15 unclaimed and identified property provisions.
- Starting next week, applications will be accepted for the Indiana Legal Help Executive Direction position.
- Work continues to support the Marion County Small Claims court tenant advocacy projects through mapping and sustainability planning with legal aid providers, small claims court representatives, and the City of Indianapolis.
- The 2024 Civil Legal Assistance Conference was a sold-out event. Thank you to everyone who attended, presented, and helped plan the event.

Jon Laramore provided an update from the Advocacy work group. The work group submitted a letter to the Rules Committee indicating the endorsement of the Coalition for proposed changes to the eviction process. The Supreme Court Committee on Limited Jurisdiction and Traffic Law also received the endorsement letter.

Advocacy work group member Monica Fennell and meeting guest Kristina Coleman from Faegre Drinker shared a proposal to change Indiana Rules of Professional Conduct Rule 1.8 to allow lawyers to give indigent clients modest gifts to alleviate the financial hardship they face in affording basic life necessities, allowing the client to more effectively engage in the legal proceedings. The proposed rule change would be a “humanitarian exception” to the general prohibition against lawyers providing financial assistance to clients.

Coalition members discussed requirements around the reporting and documentation of financial gifts provided to clients under the proposed “humanitarian exception”. Discussions included existing record-keeping requirements for attorneys and if amounts should be reported on the annual attorney registration form as a financial contribution, which may require a change to the current pro bono reporting rule.

The Coalition for Court Access endorsed the proposed changes to the previously noted Rule 1.8 as presented. The motion was approved unanimously with Hon. Geoffrey Slaughter abstaining. The Advocacy work group will look into existing record keeping requirements for attorneys and will report back to the Coalition as to whether specific guidance needs to be included in the proposed rule change or in any other rules.

Joe Skeel provided an update from the Pro Bono work group. Outreach has been made to work group members to confirm participation and quarterly meetings will resume soon. The work group will focus on reviewing the recommendations from the Pro Bono Engagement Project and will decide where to focus efforts – this might include best practices guides for coordinating pro bono, working with IndyBar on the dissemination of the Commonly Asked Questions book, and determining ways to expand and promote the availability of liability

insurance for pro bono attorneys (this was mentioned in Commission on Indiana's Legal Future, [Interim Recommendations](#), page 25).

An update was also provided on an initiative of the Indiana State Bar Association (ISBA) to explore attorney career satisfaction including why lawyers do or don't volunteer their time and how to better motivate people to volunteer and give back at the times that work best for their family and career lives.

Monica Fennell provided an update from the Rural Legal Services work group. At their last meeting, work group members shared insights from the ISBA annual summit. At future meetings, the work group is interested in learning more about various efforts to incentivize rural practice and address rural attorney shortages and will be looking to bring in guest speakers to work group meetings.

A flyer promoting three easy ways for litigants to find free legal help was shared with judges through the court's weekly e-newsletter. The flyer is also available on the Partner Resources page of [IndianaLegalHelp.org](https://www.in.gov/courts/admin/legal-help/).

The work group is interested in staying engaged with the unbundling process and considering ways to help support judges, attorneys, and litigants pursue limited scope services.

Hon. Stephanie Steele provided an update from the Self Help and Court Access work group including progress made on plain language and usability changes and a new Subject Matter Expert process to ensure forms are accurate and up to date and to help develop any new forms for IndianaLegalHelp.org. SHACA members will identify people to complete form review starting with experts in family law who will review the existing relocation form.

Bob Rath provided an update from the Supreme Court Innovation Committee noting two recent court orders:

Order Amending Rules of Trial Procedure, Trial Rule 82 (filed October 18, 2024): Current forms approved by the Supreme Court and CCA must be accepted locally (cannot be rejected).

Order on Interim Recommendation Made by the Commission on Indiana's Legal Future (filed October 3, 2024): Innovation Committee is starting an effort to explore parameters of a regulatory sandbox in Indiana. Information about the Commission on Indiana's Legal Future can be found here:

<https://www.in.gov/courts/admin/legal-future/>

<https://www.in.gov/courts/admin/files/lfc-interim-report.pdf>

Jon Laramore noted the recommendation from the Commission on Indiana's Legal Future to increase the Civil Legal Aid Fund, which is money in the state budget used to support civil legal

aid. The Court's order on the Commission recommendations supports an increase. Indiana Legal Services is considering using its supporting LLC to lobby the General Assembly for an increase during the upcoming session.

There was no new business shared by Coalition members or other attendees.

Justice Slaughter thanked the Indiana Court of Appeals, specifically Coalition members Judge Foley and Judge Tavitias for hosting today's meeting.

It was also noted that the Coalition meeting previously scheduled for Friday, April 18, 2025, has been moved to Friday, April 25, 2025, due to Good Friday.

The meeting was adjourned at 11:58am.

Remaining FY 2025 meetings (10:00a ET):

Friday, January 17, 2025

Friday, April 25, 2025



## **Meeting Minutes**

August 9, 2024, 10:00 a.m. ET

Indiana Office of Judicial Administration Conference Room and Zoom

Members Attending: Hon. Geoffrey Slaughter (Chair), Chuck Dunlap, Adam Mueller, Scott Barnhart, Hon. Peter Foley, Jon Laramore, Tom Hardin, Monica Fennell, Traci Cosby, David Pruitt, Zechariah Banks, Hon. Elizabeth Taviton, Patricia Kinney, Joe Skeel, Hon. Stephanie Steele, Kerry Hyatt Bennett, Jean Blanton, Samantha Chapman

Guests and Staff Attending: Bob Rath, Abbie Bush, Mike Commons, Christine Cordial, Michael Tolbert, Kim Berry, Olivia Cooley, Carl Pebworth, Jewel Patterson, Phyllisia Gant, Nick Parker, Meredith Fulton, Professor Bill Henderson

Justice Slaughter called the meeting to order at 10:00 a.m. and the minutes from April 19, 2024, were approved unanimously.

New members were welcomed to their first Coalition for Court Access meeting: Hon. Peter Foley, Court of Appeals; Zechariah Banks, Dentons; Patricia Kinney, IU McKinney School of Law; Samantha Chapman, Humane Society of the United States; and Thomas Hardin, Shine & Hardin

Chuck Dunlap provided updates from the Indiana Bar Foundation, including:

- The Foundation's contract with the Indiana Housing and Community Development Authority (IHCDA) to support housing stability legal services has been extended from December 31, 2024, to June 30, 2025.
- The Foundation board approved a plan to sustain the Indiana Legal Help program (website, help desk, and kiosks) into the future by separating Indiana Legal Help from the Indiana Bar Foundation. A new nonprofit 501c3 organization will be formed independent of the Foundation and will launch on or around June 30, 2025.
- At its June meeting, the Foundation board approved \$4.4M in grants from the Civil Legal Aid Fund and IOLTA program and scholarships to three students at IU McKinney School of Law. An additional \$1M will be available from IOLTA for a special grants program with requests for proposal going out over the next fiscal year. The Foundation's Loan Repayment Assistance Program will continue to support several civil legal aid attorneys through this calendar year.
- The Indiana Legal Help Desk is open five days a week from 10am-2pm ET for housing questions and with services now including live phone calls during operating hours.
- Indiana Legal Help Kiosks have all been recently upgraded to include remote software and printing improvements. Data collection on kiosk usage is improving and a few kiosks will be relocated.
- Indiana Legal Help is receiving national and state media attention through an article and

video created with IHCD and an article on kiosks sourced by the Legal Services Corporation.

- This upcoming legislative session, the Foundation expects to pursue changes to the Civil Legal Aid Fund formula, an extension to the pro bono filing fee, and clarifications to the Indiana Unclaimed Property Act.
- Registration is open for the 2024 Civil Legal Assistance Conference taking place on Friday, October 18, at the Ivy Tech Conference Center in Indiana.
- Congratulations to Indiana Legal Services, Neighborhood Christian Legal Clinic, and Indianapolis Legal Aid Society on the announcement of sustainability grants from Lilly Endowment totaling around \$12.5M.

In response to Chuck's report, Jon Laramore shared that several groups are looking for sources of funding to sustain the housing stability legal services currently funded through the Foundation's contract with IHCD. One potential source is an Eviction Protection Grant Program through HUD which could provide up to \$2.5M over two years.

Scott Barnhart provided an update from the Data Collection work group including acknowledgment of the work undertaken by Professor Victor Quintanilla, Bob Rath, and others from the Coalition for Court Access and recognition that the work group is in a transition period with new leadership. The work group will start by focusing on data visualization tools using Odyssey case data and will be exploring how data can be helpful to the Coalition and used to demonstrate to the public the value of and need for civil legal aid.

Monica Fennell provided an update from the Rural Legal Services work group including that Judge May will continue meeting with trial judges in rural areas to talk about access to justice. Several pro bono clinics have been spearheaded in rural counties such as Putnam and Montgomery using DePauw University and Wabash College students to help with intake. These clinics are offered both in-person and remotely. The work group has also been supporting the efforts of the Advocacy work group to update rules around unbundling legal services.

Jon Laramore provided an update from the Advocacy work group which was relaunched six months ago to receive and generate ideas for rule and process changes for consideration by the Coalition for Court Access. Advocacy work group members presented three topics: humanitarian exception, proposed unbundling rule changes, and proposed eviction rule changes.

Advocacy work group member Monica Fennell gave an overview of the work group's consideration of a humanitarian exception to the ethics rules allowing an attorney to provide financial assistance to clients in certain situations. Several other states allow for exceptions in their ethics rules and such an exception is part of the ABA model rules. The work group will have proposed language to present to the Coalition for Court Access at a future meeting.

Jon Laramore gave an overview of proposed changes to Indiana Professional Conduct Rules 1.0 and 1.2; Indiana Trial Rules 3.1 and 11; and Indiana Appellate Rules 16 and 23 related

unbundling legal services. Limited scope representation is already permitted in Indiana and used by attorneys. A group led by Steve Badger, Hon. Melissa May, and Hon. Kim Dowling initiated the effort to add clarity to the current rules based on Colorado rules. One goal of these changes is to make it easier and more attractive for the private bar to take on work for low-income individuals.

Questions about the proposed changes arose from several members of the Coalition for Court Access on topics such as alignment of the new rules with the current limited scope appearance form, how the withdrawal of an appearance will be reflected in Odyssey, how to ensure litigants get future service after their attorney's scope of service ends, and whether the proposed changes provide an exception to the need for a court order when an attorney withdraws. Members suggested that language needs to be added to Trial Rule 3.1 (H) to make sure it addresses contact information and future service for self-represented litigants and to Trial Rule 3.1 (I) to explicitly address whether a court order is needed to withdraw.

The Advocacy work group will report back to the Coalition before a vote will be taken on endorsement of these proposed rule changes.

Advocacy work group member Adam Mueller gave an overview of the proposed eviction rule changes currently under review by the Rules Committee sharing that the rules align with the Coalition for Court Access's goal to increase access to the courts and that the proposed rule changes don't introduce new rights but help people access the rights currently available to them. Seven rules across four topics were included in this discussion: the timing of service and initial hearing (Small Claims Rule 3.1 and Trial Rule 6(G)), sealing evictions from public record at the time of filing (Access to Court Records Rule 5), the ability for tenants to escrow rent in certain situations (Small Claims Rule 17 and Trial Rule 72), and venue (Small Claims Rule 12 and Trial Rule 75.1).

Questions and comments about the proposed changes regarding venue arose including how weighted dockets might result in a case being moved to a court that is beyond the "smallest geographic area" described in the proposed rule change and how an attorney will know where to file.

The Coalition for Court Access endorsed the proposed changes to the previously noted rules related to eviction. The motion was approved unanimously with Hon. Geoffrey Slaughter abstaining.

Bob Rath provided an update from the Supreme Court Innovation Committee noting two rules under consideration by the Rule Committee: one related to the acceptance of court forms available on IndianaLegalHelp.org and the other related to the ability for law school graduates who have passed the bar to practice under certain circumstances prior to admissions.

Professor Bill Henderson from Indiana University Maurer School of Law provided an overview of an applied research practicum focused on studying the legal system in Indiana and a nonprofit

law firm concept under consideration by the Commission on Indiana's Legal Future. The research practicum is underway with 40 undergraduate and law students involved in the course which has a seven-county focus area. Professor Henderson will share the findings of this research with the Coalition for Court Access at a later meeting.

The meeting was adjourned at 11:59am.

Remaining FY 2025 meetings (10:00a ET):

Friday, November 8, 2024

Friday, January 17, 2025

Friday, April 18, 2025