

TRUSTED HELP

The role of community workers as trusted intermediaries
who help people with legal problems



Part 2: Detailed research findings

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TRUSTED HELP: The role of community workers as trusted intermediaries who help people with legal problems

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We are grateful for the active engagement and candid input from the many people who shared their experiences, ideas, and expertise during interviews, focus groups, and surveys. This report is much richer because of their contribution.

About The Law Foundation of Ontario

Established by statute in 1974, The Law Foundation of Ontario is the sole foundation in Ontario with the mandate of improving access to justice. Through granting and collaboration, the Foundation invests in knowledge and services that help people understand the law and use it to improve their lives.

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1. INTRODUCTION

1. INTRODUCTION

1.1 Purpose

This report describes what we learned from research over the past year about how community workers can and do help people with legal problems. The Law Foundation of Ontario (the Law Foundation) commissioned the research to gain a deeper understanding of how community workers can contribute to access to justice, especially for low-income and vulnerable people.

The research results should be of interest to community organizations, the legal sector, and others who are committed to access to justice and cross-sector collaboration. This report may also assist the Law Foundation in its pursuit of ongoing learning and making evidence-based grants with a view to improving access to justice.

1.2 What you will find in this report

This is the second part of a two-part report. Part 1 summarizes key findings from the research, and based on those findings, proposes a touchstone for future action, directions for moving forward, and recommendations about the trusted intermediary role. Part 2 provides more details about what we heard and learned from the research:

Chapter 1 provides introductory context about the project, including the research methodology.

Chapter 2 looks at how community workers in non-legal organizations assist people with legal problems, the importance of that role, and the challenges that affect their capacity to perform it well.

Chapter 3 describes what we know about existing training for trusted intermediaries and about approaches that appear to work well in the development and delivery of training.

Chapter 4 discusses tools other than training that can support the trusted intermediary role.

Chapter 5 considers how lawyers and paralegals work with trusted intermediaries.

Chapter 6 provides a brief conclusion and perspectives on moving forward.

Case studies appear at the ends of Chapters 2, 3 and 5 to illustrate trusted intermediary experiences and relationships with legal service providers.

Appendices contain the survey questions we used and promising practices identified by research participants.

1.3 Context

People with legal problems may take action on their own, get help from a non-legal worker, or obtain legal advice. Often, they will try more than one of these approaches at different times. In some cases, people may not be aware that their situations have a legal element until someone they turn to for help tells them. And once they know they have a legal problem, they may or may not wish to take steps to resolve it.

Relatively few people who want to address their legal problems will get help from a lawyer. They may be deterred by the cost, or they may not know how to find a lawyer, or they may not be able to find a lawyer with the expertise needed to help them. This is especially true for people with low incomes, members of vulnerable groups, or people who are not fluent in English.

Our research looked at workers in non-legal community organizations in the context of the array of choices for addressing a legal problem shown in the diagram below.



Figure 1: How do you address a legal problem?

1.4 Notes on terminology in this report

1.4.1 “Non-legal community organizations”

The focus of our research was frontline workers in non-legal community organizations whose clients have legal problems in addition to the issues that brought them in. By “non-legal community organizations,” we mean nonprofit organizations whose mission does not include providing legal advice.

Nonprofit community organizations are highly diverse. Some are large, structured, and supported by multiple funders. Others are small, with few staff or staffed by volunteers only, and have relatively little funding and infrastructure. The community sectors they serve include immigrant settlement, violence against women, housing, health, people with disabilities, literacy, LGBTQ, Indigenous communities, Francophones, and language, cultural, or faith groups.

Some sectors under local government jurisdiction, such as libraries, parks and recreation, and social services, employ workers who play a trusted intermediary role, similar to the role of their counterparts in nonprofit community organizations. *The Connecting Report*,¹ prepared for The Law Foundation of Ontario in 2008, notes that “[t]rusted intermediaries include organizations that focus on social services, services to people with disabilities, immigrant settlement, health care, education, advocacy, or a particular faith or ethno cultural group. They also include agencies that serve the public generally, such as libraries, community centres, information and referral services, and hotlines.”²

1.4.2 “Trusted intermediaries”

When frontline workers help clients with legal problems, we sometimes refer to them as “trusted intermediaries.” That is not a plain language term, but it resonates with many of the people we consulted. It is often used in the access to justice field and the related literature in English and French.³ The term means people who are known and trusted by their clients and who can be a bridge between them and the legal help or other information or services they need.

It is important to remember that frontline workers in the non-legal community organizations described above are not the only people who act as trusted intermediaries. Government office workers, court and tribunal staff, hospital workers, and other formal or informal service providers (such as taxi drivers and salon workers), family, and friends can also fill this role. This is the case throughout Canada and in other jurisdictions. One Australian study found that people with legal problems often turn to “friends, government agencies, welfare agencies, and other professionals such as teachers and doctors.”⁴ Another Australian report highlighted the role of family members as trusted intermediaries for relatives living with disabilities.⁵ Although we often think of trusted intermediaries as non-legal assistance, an American paper profiled triage lawyers who identify cases for referral to pro bono lawyers as trusted intermediaries.⁶ And lawyers sometimes act as trusted intermediaries for other sectors, linking clients to settlement services and other community supports.

The Connecting Report highlights the role of trusted intermediaries as a strategy to remove barriers to legal information and services for people who do not speak an official language or who live in rural or remote areas of the province. It describes trusted intermediaries as the “go-to people who assist others to find and use services and who are known in their communities as credible sources of help. ... When these people know how to access legal resources and whom to call for more guidance, they can become key intermediaries between the client and the service.”⁷

1.4.3 “Clients”

In this report, we refer to the people receiving help from community organizations as “clients.” We recognize that this term is not a fit for all community organizations or sectors. It suggests a formal relationship between a service provider and the recipient of the service that is not often found in community organizations. Some sectors use other terms, like “patient” in community health organizations, “learner” in literacy organizations, or “user” in Francophone violence

against women organizations. In this report, we use “clients” in a broad sense to mean anyone who gets help from non-legal community organization staff.

1.5 Genesis of this report

The Law Foundation of Ontario is committed to ongoing learning. Since 2011, the Law Foundation has dedicated significant funding to supporting trusted intermediaries working to improve access to justice. The Law Foundation requested the research leading to this report to gain greater insight into how trusted intermediaries contribute to access to justice and to learn more about training and tools that could better support their role.

The Law Foundation asked that this research be conducted and written up in a way that will:

- **Assist stakeholders** in developing and delivering programs for trusted intermediaries and increasing the capacity of community and legal service organizations to improve access to justice; and
- **Assist the Law Foundation** to improve evidence-based grantmaking and build its capacity for ongoing learning.



Access to justice exists when the public can understand, use and afford information and services to prevent and resolve their legal disputes and to achieve just outcomes without delay.⁸

The Law Foundation’s vision is “putting people at the heart of justice.” Through grants and collaboration, it invests in knowledge and services that help people understand the law and use it to improve their lives. It achieves its objectives through a variety of grants, fellowships, and awards in addition to annual payments to Legal Aid Ontario. The Law Foundation is unique among legal institutions in its focus on the nonprofit justice sector of community organizations. Among other things, it supports training for frontline workers through core operating grants and project grants for specific communities and areas of need.

Several people indicated in our interviews, focus groups, and survey that they were happy to hear that the Law Foundation was thinking about the issues examined in this research. One interview participant said, “Kudos to the Law Foundation for getting this research under way.”

1.6 Methodology

A team from Crystal Resolution Inc., an independent consulting firm that examines public policy issues, carried out the research. Our methodology included telephone interviews, focus groups, case studies, and a literature review in both English and French. We also conducted a bilingual survey that was open to staff and volunteers in community organizations and anyone else who was interested in contributing input to the research.⁹

1.6.1 Liaison with The Law Foundation of Ontario

The research team met with Law Foundation staff at various points during the project to confirm the project plan, provide updates, and discuss findings. They supported the research by supplying information about grants, participating in a focus group, and helping to distribute the survey.

1.6.2 Interviews

An initial round of interviews was conducted with 19 key informants. Subsequent interviews were conducted with 25 additional informants, including training experts. Most interviews took place by telephone. Two interviews were conducted in French and the rest were conducted in English. Interview participants included people from Ontario, other provinces, Australia, and the United Kingdom. The combined expertise included: community service delivery; vulnerable populations; violence against women, housing, settlement and health sectors; cross-sector training; public policy research and evaluation; and innovation in access to justice.

1.6.3 Literature review

The emphasis of the literature review was on recent reports and studies from Canada and other jurisdictions that shed new light on the research topic. We focussed on reports and studies that discuss the trusted intermediary concept and related issues. For this component of our research, we adopted a broad definition of “trusted intermediaries” to include non-experts who help others with solving problems.

We reviewed and analyzed approximately 70 documents, including community-based and academic research, project descriptions, and evaluations published in Canada, the United States, Australia, the United Kingdom, and other jurisdictions. Most were written in English and several in French. In addition to the legal sector, documents covered the health (including mental health), financial, customer service, housing, and income support sectors.

In this report, we have footnoted the concepts discovered in the literature review. Unfootnoted points about what we heard and learned came from our own research sources such as interviews, focus groups, and surveys.

1.6.4 File review

We conducted a file review to learn more about training programs and other strategies funded by the Law Foundation to build capacity in trusted intermediaries. We reviewed a list of 168 of the Law Foundation’s grants relating to training trusted intermediaries, producing public legal education materials, and related matters. We then reviewed 10 files from that list in detail. We selected files to represent variety in terms of approach, legal topics, sectors, targeted population groups, types of grantees and partnerships, geography, grant programs, size of projects, and funding amounts. Most projects involved community-based organization staff and frontline workers.

1.6.5 Focus groups

Focus groups enabled us to use the synergy of a group setting to generate ideas and perspectives on future directions and improvements, building on issues raised in the interviews, literature search, and file review. Participants received

a brief document in advance that summarized research themes to date and listed topics for discussion. We convened some focus groups in person or by conference call. We held others at previously scheduled stakeholder events.

We held eight focus groups, engaging a total of 61 participants. One, at a “Connecting Ottawa” conference, was conducted in French. The rest were in English.

	Mode	Focus groups	Participants	Date (2017)
Association of Community Legal Clinics of Ontario	In-person	1	8	May 5
“Connecting Ottawa” ¹⁰	In-person	2	15	May 16
“Connecting Communities” ¹¹	In-person	2	21	June 13
The Law Foundation of Ontario (staff)	In-person	1	7	June 27
Rural Justice in Health	Conference call	1	3	July 18
Ontario Municipal Social Services Association	Conference call	1	7	July 31
Total:		8	61	

Table 1: Focus groups

Presentations

In the latter stages of the project, we made presentations to generate dialogue at previously scheduled stakeholder events:

Event	Date (2017)
Public Legal Education Association of Canada (PLEAC) conference	Sept 20
The Action Group on Access to Justice (TAG) reference group meeting	Sept 21
PLE Learning Exchange conference	Oct 26

Table 2: Presentations

Case studies

Through supplementary interviews, we prepared three case studies to provide a picture of the work of trusted intermediaries and add depth to our understanding of their environment, their experience, their partnerships with the legal community, and the influences working on them, their clients, and their organizations. We shared the case studies with the subjects to ensure that we had correctly captured the points they made. We kept their identities confidential.

Online survey

The purpose of the online survey was to obtain input from frontline community workers and from anyone else who wished to have a say in the research project. It was an opportunity to hear from a broader range of stakeholders than we could reach through interviews, focus groups, and case studies.

The survey was brief and mostly quantitative. We made it available in English and French. We included a few comment boxes where people could provide qualitative data to share information, ideas, and insights. People who identified as frontline staff or volunteers in non-legal community organizations were directed to more questions than other respondents.

Rather than targeting survey dissemination to a defined group of individuals or organizations, we asked the Law Foundation, Community Legal Education Ontario (CLEO), key informants, and selected umbrella groups to “get the word out” by circulating the survey to their contacts. For example, the Law Foundation and CLEO used social media to advise stakeholders about the survey. We also wrote to umbrella organizations, networks and associations, and to key informants encouraging them to pass on the survey links to people within their networks.

We received a total of 403 completed surveys, of which 30 (7.4%) were completed in French. The remaining 373 (92.6%) completed the survey in English. Ontario’s urban areas accounted for 81% of the respondents, 16% were from rural or remote communities in Ontario, and 3% responded from another country or province.

Of the 403 survey respondents, 231 self-identified as a staff member or volunteer providing direct (frontline) services in a non-legal community organization.

Survey respondents were asked to identify the categories applicable to them from the eight listed possibilities.

Respondent categories	Total
Staff in a non-legal community organization	214
Volunteer in a non-legal community organization	22
Lawyer	70
Paralegal	21
Legal clinic community legal worker	34
Researcher or academic	28
Person who has received legal help from a non-legal community organization	13
None of the above	41

Table 3: Survey respondent categories (# per category)

The survey responses indicate a strong interest in the research topic within the nonprofit, legal, and academic sectors. A total of 403 people took the time to complete the survey, 150 of them provided details about promising programs, practices, and tools, 79 offered additional comments and ideas, and 156 said that they would be willing to be contacted

by one of our researchers. The high level of engagement with the survey and research questions is an indication of the importance of the role of trusted intermediaries and the interest in supporting their efforts to advance access to justice.

We did not observe major differences in responses based on language (French or English), respondent category, size of organization, or location.

We did note one difference between respondents who completed the English and French versions of the survey. Only 38.15% of respondents to the English version said they were aware of training programs, practices, or tools that work well to support community workers to help people with legal problems. Among those who completed the survey in French, 63.33% indicated that they were aware of such resources. We concluded that, although there may be fewer resources in French, those resources are perhaps better known within Francophone communities.

The results also suggest that rural frontline workers are somewhat more comfortable about providing basic information about legal rights and procedures than their urban counterparts. They are less likely, however, to have accompanied people to meetings with legal service providers or to tribunal or court hearings.

Note that unless otherwise indicated, survey totals and figures presented in this report include combined totals from French and English versions of the survey.

See Appendix A for the survey questions.



2. SERVING AS A TRUSTED INTERMEDIARY

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2.1 Nature of the role

Frontline workers in community organizations help people in many ways, and they are often the first point of contact for people who need legal assistance. Although they don't provide legal advice, they help clients to identify legal problems and to understand their situations and the steps they can take. They serve as trusted and accessible intermediaries between their clients and a complex legal system that many people, particularly vulnerable people, find confusing and impenetrable.¹² Some workers may see a client once or twice, but many build relationships with their clients over time. They become ongoing resources and advocates for people who need to exercise their legal rights and navigate the legal system.

The type of assistance with legal problems non-legal workers provide varies widely,¹³ yet the workers share a characteristic: they are often prepared to go beyond their job description to help their clients, sometimes doing work for which they are not specifically funded, trained, or paid, and for which they have to carve out time in an already full work day.¹⁴

In Ontario, many frontline workers in non-legal community organizations have helped clients with legal problems by identifying legal issues, providing legal information, making legal referrals, helping clients to complete legal forms, suggesting next steps, and accompanying clients to legal meetings and hearings. Community workers can't give legal advice, but they can and do help people to better understand the law and navigate the legal system.

In our survey, 231 of the 403 respondents self-identified as a staff member or volunteer providing direct, frontline services in a non-legal community organization. The vast majority of them (97%) were from Ontario. A significant number of these frontline workers had done all of the seven trusted intermediary activities we listed. The percentage of respondents who had provided specific services ranged from a low of 43.6% who accompanied people to meetings with legal service providers to a high of 92.8% who referred people to legal service providers.

Help provided by frontline workers (%)

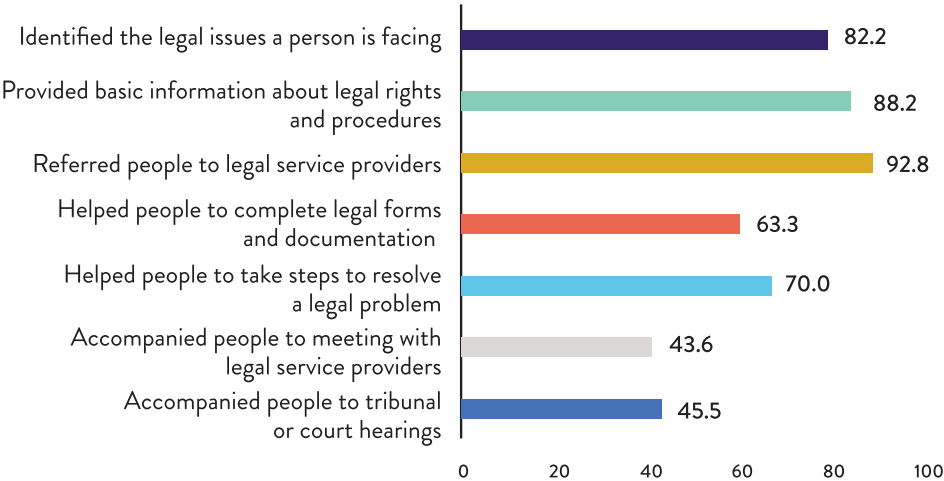


Figure 2: Help provided by frontline workers (% of frontline workers)


The degree to which workers are comfortable with providing different kinds of help varied. Among the 231 frontline workers who completed the survey, the comfort level for providing legal referrals was higher than for other categories (53.4% “very comfortable” and another 25.1% “comfortable”). Even with legal referrals, some were only moderately comfortable (14.2%), slightly comfortable (4.6%), or not comfortable (2.7%).


Comfort levels (%)	Not comfortable	Slightly comfortable	Moderately comfortable	Comfortable	Very comfortable
Identifying the legal issues a person is facing	10.5	15.1	23.7	32.4	18.3
Providing basic information about legal rights and procedures	6.4	15.5	22.8	36.1	19.2
Referring people to legal service providers	2.7	4.6	14.2	25.1	53.4
Helping people to complete legal forms and documentation	24.7	14.0	27.4	22.8	11.2
Helping people to take steps to resolve a legal problem	19.0	19.9	23.1	23.6	14.4
Accompanying people to meetings with legal service providers	32.6	7.9	11.6	22.3	25.6
Accompanying people to tribunal or court hearings	34.1	9.7	12.9	17.5	25.8

Table 4: Comfort levels (% of frontline workers)

2.1.1 Identifying legal issues

Community workers can help to recognize that clients’ problems include legal issues. Part of this role is knowing the questions to ask. Intake forms can be a useful tool in helping workers to recognize problems and draw out legal issues and needs that clients may have.

 At our health centre, we see a lot of low-income people and many of them present with legal problems. The challenge is knowing the questions to ask. – Focus group participant

 We hear about legal and legal related issues all the time in our conversations with patients. People tell us stories but we don’t always recognize there is a legal issue. – Interview

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 82.2% indicated that they have provided help to clients to identify the legal issues the clients were facing.

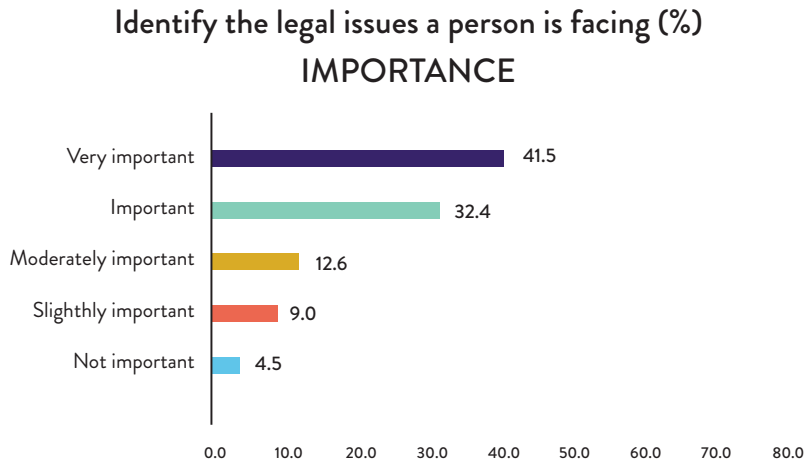


Figure 3: Identify legal issues – importance (% of all respondents)

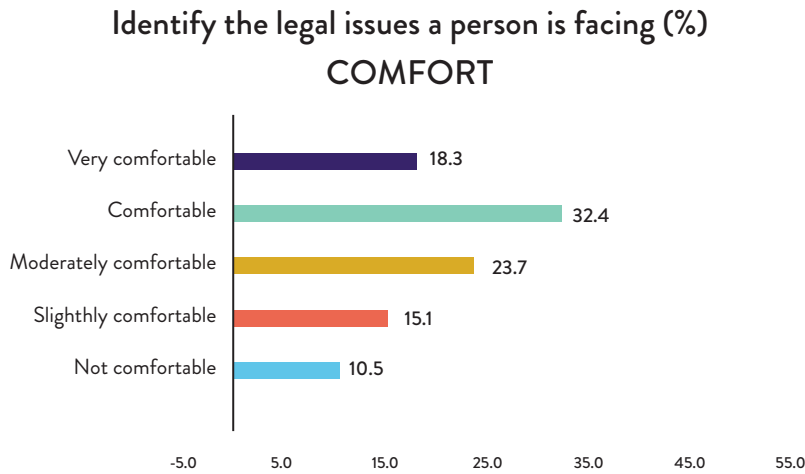


Figure 4: Identify legal issues – comfort (% of frontline workers)



SNAPSHOT: Legal health check-up

“Identifying everyday problems”

“The Legal Health Check-Up developed by Halton Community Legal Clinic is a model that has served the Halton community and other communities who have adopted the model. The model uses a checklist to identify everyday problems, in everyday language, that are actually legal problems or likely to become legal problems. Trusted intermediaries who are enlisted to use the check-up tool have been trained to triage matters and ensure people in the community who might slip through the cracks, or who might not make it to the clinic on their own, get to the legal clinic for help at the right stage and at the right time.” – Survey

The Community Advocacy Legal Centre displays poster-sized copies of its version of the Legal Health Check-Up in local libraries and Justice in Health partner organizations use it in their work. – Interviews

2.1.2 Providing legal information

If clients have legal problems, it is important to give them information that can help them understand their situations. It is common for community workers to rely on public legal education and information materials, whether on websites or in pamphlets. Some clients appreciate learning where to find legal information so they can use it to understand their problem and their rights, advocate for themselves, or decide whether to seek legal advice. Ideally, legal information can also help people avoid the formal legal system.

In Ontario, public legal information is available, on a wide range of topics, adapted for diverse users and for a variety of purposes. Much of the information is available online and some bodies also produce print materials. Some frontline workers told us that they have easy access to reliable and helpful legal information and tools, but others said they have difficulty finding such resources.

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 88.2% indicated that they have helped clients by providing basic information about legal rights and procedures.

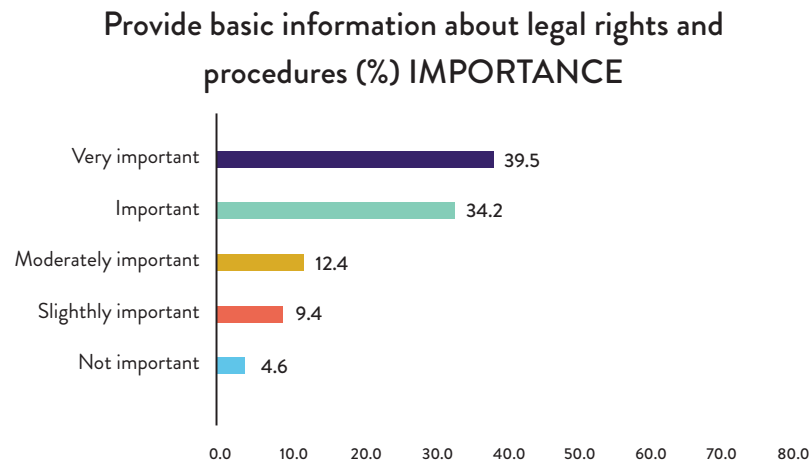


Figure 5: Provide information – importance (% of all respondents)

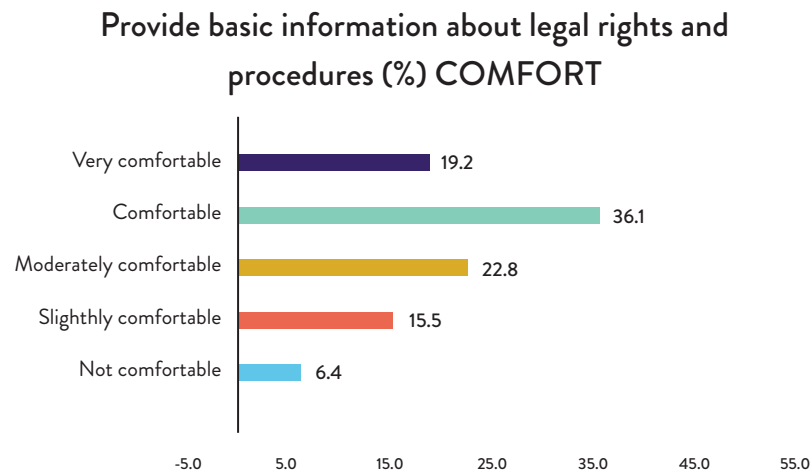


Figure 6: Provide information – comfort (% of frontline workers)



When people are provided with information, they are in a better position to make the best choices they possibly can. Often the trusted intermediary is the primary or only source of legal information. – Interview



SNAPSHOT: Libraries

“The first point of inquiry”

Libraries provide legal information and pamphlets from various sources and may run legal information sessions for the community (e.g. understanding landlord and tenant legislation). One library reported that a community legal worker works out of the library one afternoon per week as a resource for the community. – Survey

“We serve a high proportion of the vulnerable population here in town, and often the library is the point of first inquiry on all matters, including legal issues.” – Survey



SNAPSHOT: Action ontarienne contre la violence faite aux femmes (AOcVF)

“Family law information for non-legal workers”

AOcVF has a legal services centre for Ontario Francophone women who have experienced violence (*Centre de services juridiques pour femmes francophones de l’Ontario*). The Centre employs a legal support worker who is knowledgeable about family law but is not a lawyer or paralegal. The legal support worker provides family law information in French to non-legal workers at different organizations that are members of the AOcVF. She is also available to provide family law information to clients of member organizations. One of the goals of the Centre is to provide family law tools for non-legal workers to help them better serve Francophone women in their respective regions in Ontario. The legal support worker also organizes webinars by lawyers for non-legal workers across the province. Recently, the Centre launched a service where the legal support worker can book appointments for clients with lawyers who provide summary legal advice in family law. – Interview

2.1.3 Making referrals

Frontline workers refer clients to community legal clinics, student legal aid societies, Legal Aid Ontario, and sometimes to paralegals or to private bar lawyers, some of whom accept legal aid certificates or offer pro bono services.

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 92.8% indicated that they have referred clients to legal service providers.

One of the most striking findings from our survey is the importance of legal referrals as a role for non-legal community organizations across all categories of respondents. Of all respondents, 94.3% indicated that legal referral was either “very important” (75.7%) or “important” (19.5%), and 92.8% of frontline workers said that they have referred people to legal service providers.

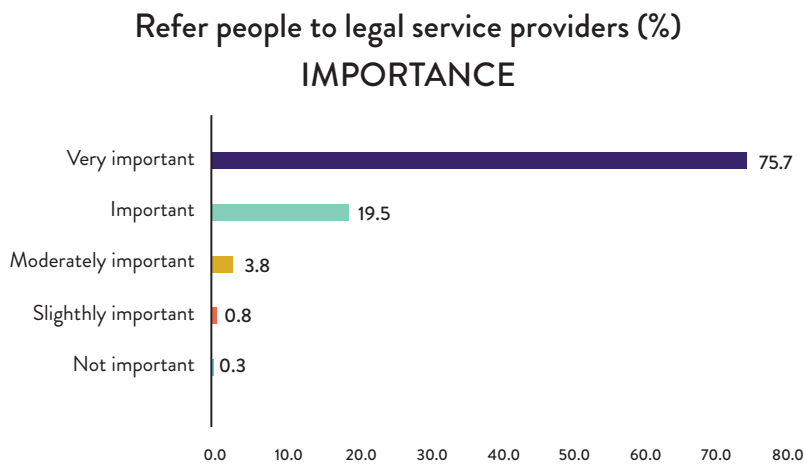


Figure 7: Refer to legal service providers – importance (% of all respondents)

Legal referrals are also the role in which respondents who identified as frontline workers in a non-legal community organization feel most comfortable, with close to 80% indicating that they are “comfortable” or “very comfortable” in that role.

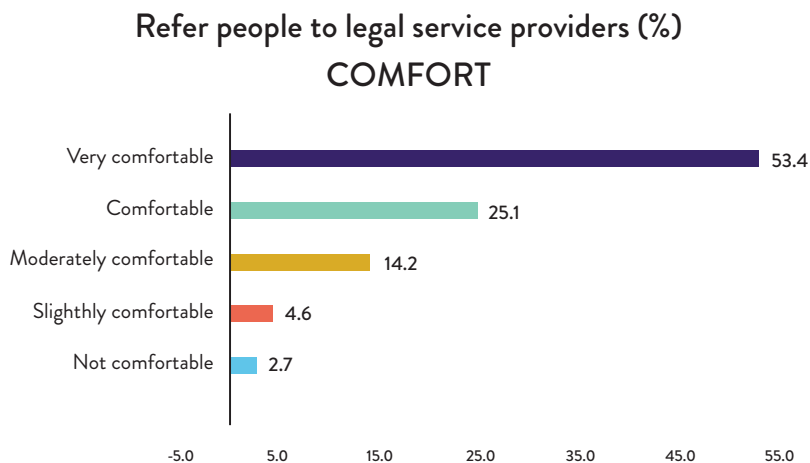


Figure 8: Refer to legal service providers – comfort (% of frontline workers)

Some frontline workers we spoke to described how their role in making legal referrals has evolved. In the past, they may have simply provided the client with the name and contact information of a legal service provider. Now they make a point of getting to know the people on the referral list, consider who might be best for a particular client, and make the first call on the client's behalf.

Another example of a good referral is where the worker sees the client, identifies the legal issues, refers the client to a legal clinic, lawyer, or paralegal, and then works collaboratively with them. In such cases, the worker may get information or documents that the legal practitioner needs for the file and may continue to provide support to the client.

2.1.4 **Form filling**

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 63.3% indicated that they have helped clients to complete legal forms and documentation.

We also heard during our research that although many clients need help filling out legal forms or preparing court documents, frontline workers are often uncomfortable with providing that type of help because they worry about crossing the line between legal information and legal advice. Some participants noted that when a lawyer or paralegal is available to do a final review of the form, the client benefits and the worker is more comfortable. However, this type of legal support is often not available.

Legal forms include forms to do with housing, immigration, divorce, child or spousal support, employment standards violation complaints, and many others. Most of these forms are available online, and some are fillable “smartforms,” with pop-up information, which people can fill out on their own. Smartforms could make the role of trusted intermediaries in helping people to fill out forms more feasible and effective. As the Law Society of Ontario works on defining the legal services that can only be performed by a licensed legal professional, it should take into account how much people can benefit from trusted intermediaries in the absence of or in conjunction with legal professionals.



We see families that are quite vulnerable. There is a lot of mental illness, severe poverty. We connected one client with the legal clinic a few times, once about a landlord who had changed the locks, then about an ODSP overpayment. When another issue arose—getting a power of attorney set up for an adult son who was quite ill—the client didn't have to wonder where to go. – Focus group participant



I strongly believe that support workers should be permitted to help people to fill out family court forms, but it is still the litigant's responsibility to obtain legal advice to ensure the forms are filled out correctly. – Survey

Help people to complete legal forms and documentation (%) IMPORTANCE

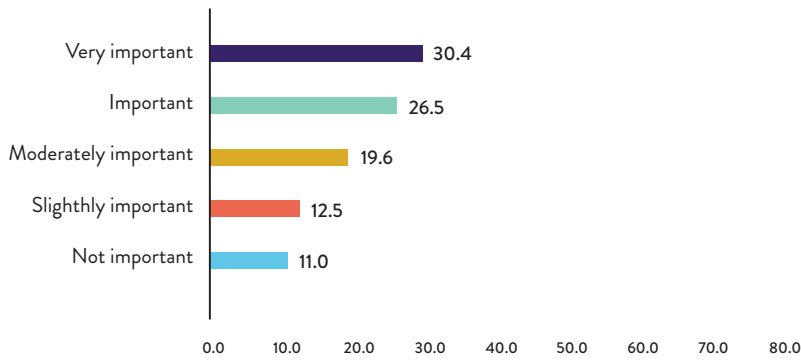


Figure 9: Help with forms – importance (% of all respondents)

Help people to complete legal forms and documentation (%) COMFORT

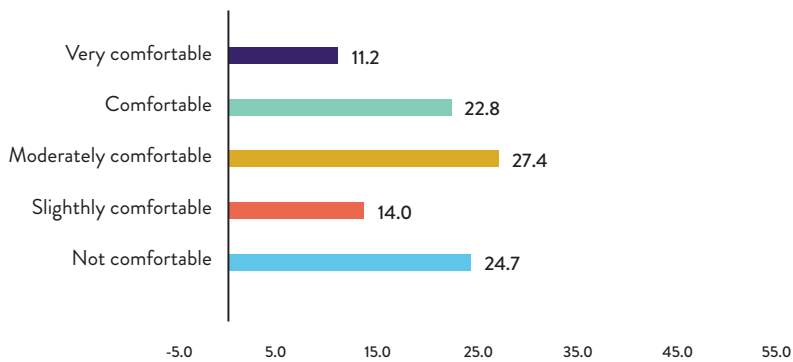


Figure 10: Help with forms – comfort (% of frontline workers)

2.1.5 Helping people to navigate the legal system

Trusted intermediaries help people to navigate the legal system by identifying next steps or a path to follow. Without this type of assistance, many people may not know where to go or how to begin. Even people who represent themselves need some help.

In the navigator role, trusted intermediaries can help clients to make sense of confusing bureaucracy and legal processes. Some workers told us that they sometimes take additional steps to help clients with their legal problems, for example by writing a letter to a landlord or helping them to apply for Legal Aid.

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 70% indicated that they have provided help to clients to take steps to resolve a legal problem.

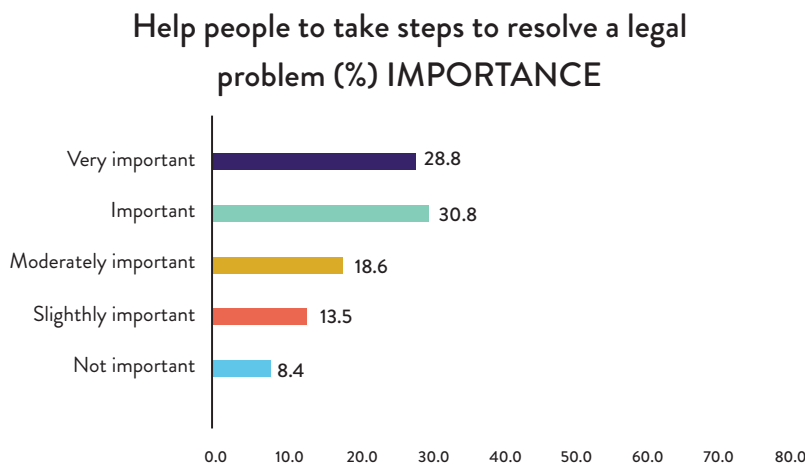


Figure 11: Help to take steps – importance (% of all respondents)

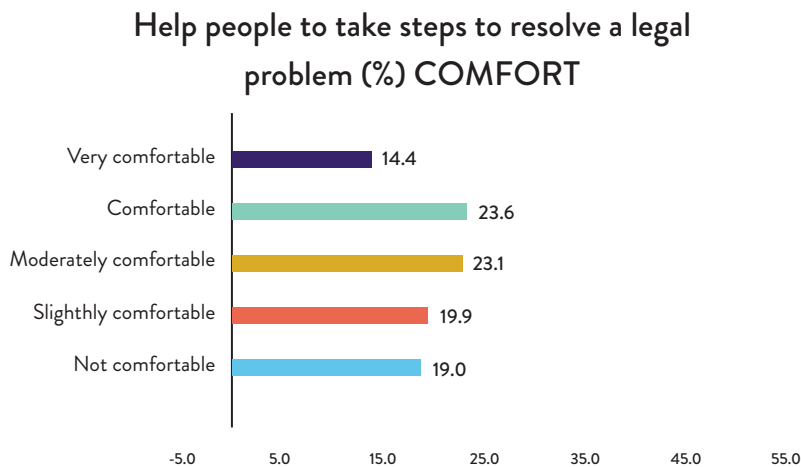


Figure 12: Help to take steps – comfort (% of all respondents)

2.1.6 Accompanying people to legal meetings

Accompanying clients to legal meetings is time consuming, but many workers take the time to do it. Of the 231 survey respondents who identified as frontline workers in non-legal community organizations, 43.6% indicated that they have accompanied clients to meetings with legal service providers.

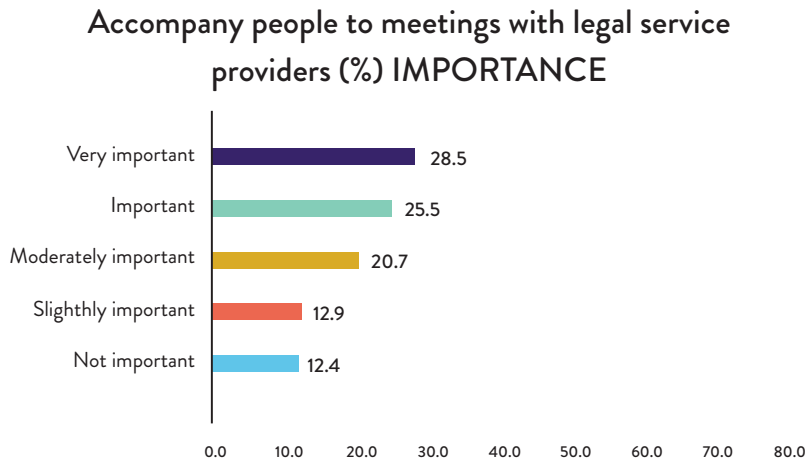


Figure 13: Accompany to legal meetings – importance (% of all respondents)

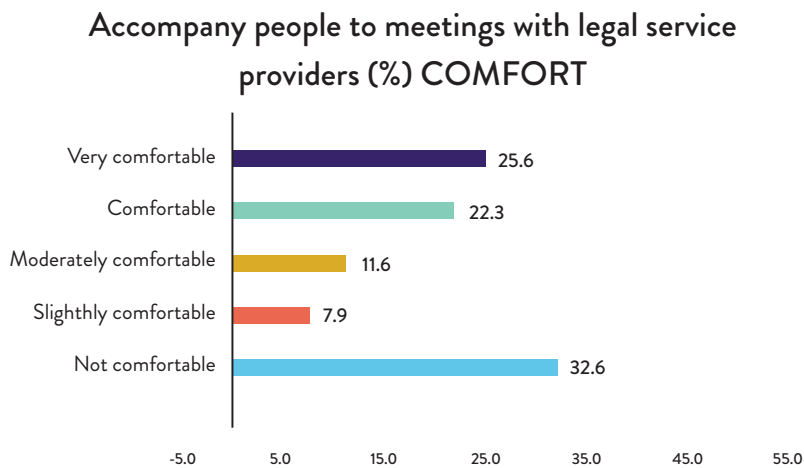


Figure 14: Accompany to legal meetings – comfort (% of frontline workers)

2.1.7 Accompanying people to court and tribunal hearings

Of the 231 survey respondents who identified as frontline workers in a non-legal community organization, 45.5% indicated that they have accompanied clients to tribunal or court hearings.¹⁵

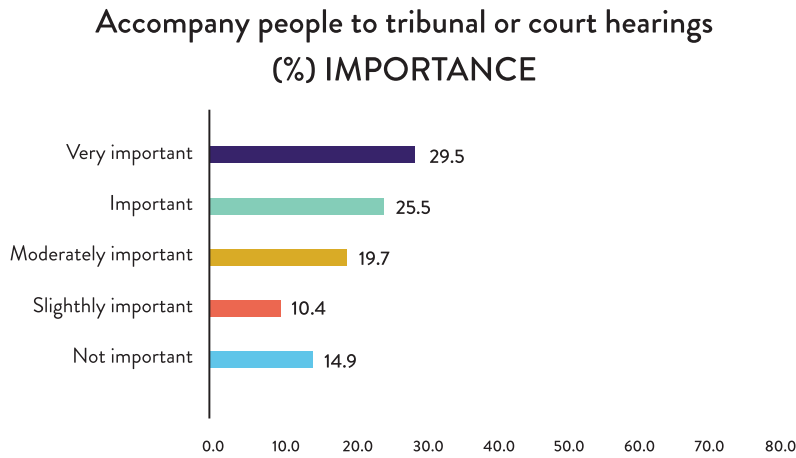


Figure 15: Accompany to hearings – importance (% of all respondents)

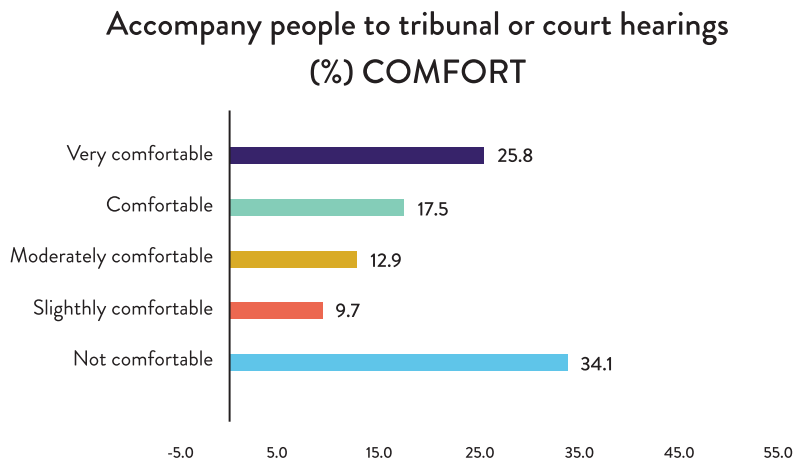


Figure 16: Accompany to hearings – comfort (% of frontline workers)



SNAPSHOT: Family Court Support Worker Program / Luke's Place

“Navigating the family court process”

“The Family Court Support Worker Program is a very helpful program to assist clients who are victim of domestic violence. As such a worker, I provide my clients with legal information, accompaniment to court and lawyer’s appointments, emotional support, safety planning, and referrals to other community agencies.” – Survey

“The Family Court Support Worker program, funded by the Ministry of the Attorney General, supports victims of domestic violence as they navigate the family court process. Luke’s Place offers initial training, ongoing training, a forum that is moderated and posts with recent case law and judge’s decisions, information, news articles, interesting facts, and news items. It also offers a forum for workers to collaborate/share ideas and support each other so that workers are kept informed, connected, and don’t feel alone in this work (especially where workers are from remote communities of northern Ontario and often work in isolation).”
– Survey

2.2 Importance of the role

The importance of the trusted intermediary role and the need to support it are both well covered in the literature. Researchers and academics in Canada, the UK, Australia, and the US have documented the way trusted intermediaries help people address common legal needs. In our interviews, focus groups, and surveys, we heard much about the value of community workers who can act as trusted intermediaries when a client’s problems include a legal component. Key elements include the client’s comfort and trust, the holistic approach to helping clients to resolve multiple aspects of their problems, and the opportunity for early intervention to prevent a legal problem from escalating. Frontline workers are sometimes the only source of help. They can also complement the role of lawyers and paralegals who may become involved.

The reality is that many people, especially people who are vulnerable or have low incomes, will not receive help with their legal problems without intervention from a trusted intermediary in a community organization. This concept is well articulated in the quotation below from the Law and Justice Foundation in New South Wales, Australia:

[I]t is particularly striking that the only type of advisers that the most disadvantaged were significantly more likely to use for their legal problems were health or welfare advisers and not-for-profit legal services. This finding provides stark empirical evidence further identifying health and welfare advisers as important access to justice pathways, particularly for more disadvantaged and less capable people at heightened risk of unmet legal need.¹⁶

In the health sector, an evaluation of the expansion of Telehealth in Northern Ontario First Nations communities demonstrated how coordinating the work of local intermediaries, who belong to those communities and who have relevant cultural and linguistic knowledge, with the work of other professionals can lead to an increase in use of a public service and cost savings.¹⁷

Many people we spoke to in interviews and focus groups viewed the trusted intermediary role as important, describing it as “critical,” “hugely important,” and “essential.” The main factors relate to client comfort and trust, early intervention, difficulties in gaining access to legal services, complementing the role of legal practitioners, and holistic approaches. Several people also expressed caution about the role, especially if it is not well supported and understood.



Most people never see a lawyer, but they see community workers all the time.
– Interview

In our survey, we asked everyone about the importance of the seven roles of non-legal community organizations as they relate to people who have legal problems. To varying degrees, respondents primarily saw these roles as “very important,” “important,” or “moderately important.”

Role (%)	Not important	Slightly important	Moderately important	Important	Very important
Identify the legal issues a person is facing	4.5	9.0	12.6	32.4	41.5
Provide basic information about legal rights and procedures	4.6	9.4	12.4	34.2	39.5
Refer people to legal service providers	0.3	0.8	3.8	19.5	75.7
Help people to complete legal forms and documentation	11.0	12.5	19.6	26.5	30.4
Help people to take steps to resolve a legal problem	8.4	13.5	18.6	30.8	28.8
Accompany people to meetings with legal service providers	12.4	12.9	20.7	25.5	28.5
Accompany people to tribunal or court hearings	14.9	10.4	19.7	25.5	29.5

Table 5: Importance of the role (% of all respondents)

2.2.1 Client comfort and trust

People often come to a community worker or other trusted intermediary before they go anywhere else to talk about problems that may have a legal component. A client’s trust in the worker is a huge factor in enabling the worker to assist.

Workers who are successful in the trusted intermediary role listen to their clients attentively, show empathy, and try their best to refer their clients in the right direction. Frontline workers get to know their clients’ circumstances and

their larger set of problems. This can be a big help in moving forward to address the client’s legal issues.

Frontline workers often share languages and cultural backgrounds with their clients and are attuned to their circumstances. Workers who speak French participate in implementing Ontario’s French language services framework. Workers who speak other languages widen the scope of services within organizations. For example, settlement workers often speak the language of the people they help. Newcomers can discuss their problems in their own languages, which is beneficial to trust, comfort level, and ease of communication.



Our experience is that most women who have left an abusive relationship have difficulty trusting people and the information given to them. Their first trusting relationship is often with a shelter worker, community counsellor, or Family Court Support Worker. – Interview



When a client’s housing is threatened, they’re under stress. It helps to have someone who knows the case but is emotionally separated. The trusted intermediary is a consistent person to go to with questions or problems and the client doesn’t have to tell their story over and over. – Focus group participant

Community-based trusted intermediaries who participated in our interviews and focus groups often serve people with low incomes or complex needs. An Australian study highlights the importance of trust and familiarity in reaching out to clients with complex needs.¹⁸ Another study, focussed on low-income countries, emphasizes the importance of trusted intermediaries to reach out to poor and vulnerable people.¹⁹



SNAPSHOT: Access Alliance Multicultural Health Centre

“People don’t know about their rights”

The Access Alliance Multicultural Health Centre is a multidisciplinary community health centre that serves immigrants and refugees, non-status residents, and LGBT+ communities.

“We strongly believe that social determinants of health affect physical health. Last year, we had a workshop on changes to refugee law; everyone (including doctors, nurses, frontline workers) attended. Most people we see from other countries and systems don’t know about their rights in housing, as a refugee, or other legal information. People trust frontline settlement workers since they are the first contact point for clients.”

– Interview

2.2.2 Early intervention

Timing is another aspect of trusted intermediary work, and it can have an impact on access to justice. For example, if a legal problem is not identified early, it may be more difficult to address. A book published in the UK about the future of the professions notes the concern that problems will escalate unnecessarily by the time a legal professional becomes involved.²⁰

A Canadian report stresses the importance of early, high-quality responses by trusted intermediaries. The report recommends developing legal capability from youth through adulthood. It also recommends training public legal education and information providers, trusted intermediaries, and providers of direct legal services “to reinforce assessment, triage, and referral mechanisms so that citizens can quickly find the help they need.”²¹

Other studies discuss practical shorter-term strategies such as tools that can help trusted intermediaries identify legal problems and refer people to appropriate services earlier.²²



Legal information can have a big impact on clients’ lives. If they don’t get the help they need, there can be a negative spiral down. – Interview



SNAPSHOT: Parks and Recreation Sector

“The first identifiers of issues”

The members of Parks and Recreation Ontario (PRO) are predominantly municipal government parks and recreation departments, but nonprofit community organizations are involved as well, such as the YWCA/YMCA and Boys and Girls Clubs.

“Parks and recreation staff may be the first identifiers of issues and may observe mental health issues, financial issues, or abusive situations with legal implications. At older adult centres, clients may need legal assistance for seniors’ fraud, or children trying to get their parents’ money. It would be helpful for the workers to know how to respond about what people’s rights are, but there isn’t training provided about that or about how to help people with legal issues. One challenge is that many frontline workers are volunteers.”

PRO uses webinars, a bi-monthly newsletter, a listserv, and conferences to help their members learn and remain up-to-date on provincial issues. PRO has recently created a management certificate program. This is a three-day program that deals with communications, strategic management, political acuity, and organizational savvy. This is not viewed as a program that can be run on line due to the importance of networking and internal communications, developing a “brain trust” of people you can contact.

– Interview

2.2.3 A place to turn for help

Research into civil legal needs and access to expert legal advice shows that many people typically ask for legal information and help from family members, teachers, faith leaders, or community workers, particularly when they first become aware of their legal problem. Clients, especially those who face barriers and have low incomes, often see getting help from a legal professional as expensive and out of their reach. Clients may also turn to someone they can relate to because the law can be intimidating and legal professionals may speak in a way that is hard for them to understand. In many cases, professional legal advice or representation is simply not available, at least not at a cost these clients can afford.

Going to a lawyer or paralegal for every problem with a legal component is not the solution, nor is it feasible. We need to consider a variety of options to respond to people’s legal problems. Trusted intermediaries are part of the solution.

A health study focussing on low-income countries looked at two service delivery strategies involving trusted intermediaries. One strategy was “task shifting,” which involved “delegating tasks to existing or new cadres with either less training or narrowly tailored training.” The other strategy was “skill mix,” described as “the mix that produces the maximum number of health care services at a given quality and cost.”²³

2.2.4 **Complementing the role of lawyers and paralegals**

Community workers complement the work of lawyers and paralegals who serve vulnerable clients. They assist with the clients’ related non-legal needs, which gives lawyers and paralegals more time to do the legal work. They support clients by accompanying them to meetings and provide context and data to the legal team about the systemic issues related to the client’s case.

Some of the frontline workers we consulted talked about how they prepared clients for what to expect in a meeting with a legal professional so that they would get the most out of the meeting. They also helped clients gather the documents the lawyers or paralegals need. This kind of help makes better use of the limited time available with the legal professionals and helps the legal team deliver more focussed and efficient service.



Frontline workers help when lawyers or paralegals become involved. They have a lot of information and understand the situation. They are especially helpful with clients who have mental health challenges. – Focus group participant



One client had a fire in her apartment. The landlord said it was her fault and she had to pay \$7,000. I helped the client call the legal clinic, but now the tenant is anxious and she needs support. I am helping her to communicate with the lawyer, and providing the lawyer with more information. – Interview

2.2.5 **Holistic approach**

Legal problems often intersect with other problems a client is facing. We heard that trusted intermediaries can take a holistic approach to helping clients address various aspects of their intersecting problems.

Trusted intermediaries help to improve service delivery, whether the client has legal problems or other problems that are not in the worker’s main areas of expertise. In the health care sector, for example, they play an important part in developing client-focussed approaches.²⁴



SNAPSHOT: LITERACY SECTOR

“The student comes through the door with a whole host of issues.”

There is a strong correlation between income and low literacy levels. Literacy programs try to see literacy holistically, often referring adult students to a range of services, such as social housing and foodbanks. Sometimes, literacy educators find that students have legal issues as well.

“Students may come through the door with a whole host of issues. Literacy educators would definitely refer them to a local legal clinic, legal aid, or 211 as appropriate. They would be very cautious about giving any legal advice. Most literacy programs take the importance of helping people get the services they need very seriously even though they’re not funded to do this; they know it’s critical to a student’s goals in life. We’re pretty passionate about helping people access the services they’re entitled to.”

– Interview

2.3 Challenges

2.3.1 Diverse communities

Organizations serving Indigenous, rural, and northern communities often face additional barriers. Fewer services are available to them. They also contend with distances that make it more difficult to attend training and networking events and can limit possibilities to form connections and trusting relationships.

Francophone intermediaries and their clients also have the challenge of limited access to legal information. They have fewer tools and services available in French, as well. Trusted intermediaries working with other languages and cultural groups also face specific barriers, such as lack of training geared to the populations they serve. The Law Foundation of Ontario has supported efforts to help frontline workers meet the needs of diverse communities. This includes the “Connecting Communities” and “Connecting Ottawa” initiatives that focus on the needs of people who don’t speak one of Canada’s official languages, as well as on the needs of communities in rural and remote areas.

2.3.2 Interest and comfort

Some frontline workers are interested in serving as trusted intermediaries for clients with legal problems and others

are not. Those who are not interested may lack confidence in dealing with the complexity of legal issues and processes. They may not see it as part of their jobs, or the organizations they work for don't support the role.



The role may be outside some workers' comfort zones, but it is within their scope of practice because they are helping people with multiple problems. – Interview

2.3.3 Turnover

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

2.3.4 Time

On a busy day, workers may not have the time to discuss the legal aspects of a problem with their clients, to consult information resources, or to attend lengthy training sessions that could help them in the trusted intermediary role. This is especially true of workers in small organizations.

Training sessions for the trusted intermediary role vary in duration. A short session (for example, half a day) may be insufficient to fully absorb the training topics. A longer session (for example, up to three days) may mean that workers can't attend all of the sessions. There is a need to carefully construct training programs and to provide accessible tools and supports to directly assist trusted intermediaries in their work.



I'm struck by the turnover in nonprofit organizations. Everyone says, "I just started." – Interview



There's a difference in the role between a new staff person answering the phone and those with deeper relationships in the community. – Interview

2.3.5 Money

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

Tools and supports for trusted intermediaries can be expensive or time-consuming to develop. Although training is usually offered without cost for trusted intermediaries, some organizations have developed more formal programs where participants pay for courses.

2.3.6 Organizational policies

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



Our manager insists that, since we have no legal training, we have no obligation to provide legal information. It is for our protection. – Focus group participant

A few participants in our research suggested policy changes to respond to these challenges:

- Put a system navigator or outreach role into play in the organization. Doing this in a central way could be seen as a large undertaking, which might require a philosophy shift.
- Build trusted intermediary training into annual conferences and employee orientation and integrate it with other staff training programs within the organization. That would demonstrate organizational commitment and reach more people.
- Ask participants in trusted intermediary training to reflect on steps they would recommend for their organizations.



People who end up being frontline community workers go into these jobs not knowing much about the law. But many issues their clients are facing have to do with the law, like housing and employment. – Interview

2.3.7 Finding good information

There are many good sources of legal information but not everyone knows about them. Even when workers find information, they may be unsure about whether it is what they need to help their client and whether it is reliable. It is often easier to find information about rights than about how to take steps to enforce them or options to resolve a problem. The Francophone community in Ontario has the additional challenge of fewer materials and supports available in French compared with English, despite existing legal obligations to provide services in French. There is also a need for legal information materials and supports in languages other than English and French.

Respondents mentioned some of the legal topics that affect their clients. The list below, although not comprehensive, illustrates the broad range of topics.

Legal topics mentioned by research participants	
<ul style="list-style-type: none"> • Accessibility for people with disabilities • Child welfare • Co-op housing rights • Consumer protection • Copyright and licensing • Criminal background checks • Criminal law • Education law • Elder abuse • Employment law • Employment Standards Act • Family law • Gladue reports for Indigenous clients • Housing • Human rights • Immigration 	<ul style="list-style-type: none"> • Intimate partner violence • Landlord and tenant • Limitation periods • Limited scope representation • Old Age Security and Canadian Pension Plan • Occupational health and safety • Regulations regarding medical use and personal production of marijuana • Rights of people diagnosed with Alzheimer’s disease • Role of paralegals • Small claims court • Social assistance • Violence against women • Wills, estates, and powers of attorney

Table 6: Legal topics

2.3.8 Legal information versus legal advice

There is a “grey zone” between legal information and legal advice. The distinction can be a challenge for community workers to understand and navigate. This was a common theme throughout our research. Some participants from the legal community cautioned that, in the trusted intermediary role, workers could potentially “slide into a lawyer role” or “overstep their knowledge boundaries.”²⁵ A broad range of participants were in favour of finding ways to address or minimize that risk. For many clients, the help they receive from a community worker is the only help they will get for their legal problem.

Some community workers are afraid to provide certain types of assistance—completing legal forms, for example—for fear of straying across the line. A recent Canadian paper discusses the “potential chilling effect” of the fear of violating legal practice rules when navigating the boundary between legal information and advice.²⁶ However, we heard positive

comments about training programs that provide guidance on navigating the “grey zone” and about existing resources that explain the difference between legal information and legal advice.²⁷



A little information can be dangerous. People may overstep their knowledge boundaries and clients will not get the right information. – Interview



Too many people have come to grief because a well-meaning worker didn't complete forms correctly. – Survey



There are understandable concerns but a conservative approach to engaging trusting intermediaries will leave many without access to any help solving their legal issue. – Interview



The issue about legal information vs. advice can influence people to be risk averse. – Focus group participant

In looking at the issue, it will be important not to err on the side of being too restrictive about what trusted intermediaries can do. It is essential for workers to understand the types of help they can provide, and the limitations of their role, but unduly restrictive interpretations of what constitutes legal information would be a deterrent that would leave many vulnerable clients without any assistance at all. A better approach would empower trusted intermediaries to do what they are able to do to support people with legal needs.

Technology has enabled a “do it yourself” approach to some common legal problems. As technology progresses with “smartforms,” shared intake tools, and guided pathways to find legal information, concerns about trusted intermediaries supporting clients may be seen differently.

Although outside the scope of our research, court staff are a type of trusted intermediary. An Ontario report focussing on family law emphasizes the need to explore additional strategies such as training court staff about the difference between legal information and legal advice and encouraging them to maximize the services they can offer to unrepresented litigants.²⁸ This report and others discuss the role that paralegals, students, and others can have in improving the accessibility of services.²⁹ The Law Society of Ontario has recently approved a plan to allow paralegals, and potentially others, to offer some family law services.³⁰ It is important to note that many intermediaries, including frontline community workers who support vulnerable clients, work in far less formal and more modestly resourced organizations than workers in government offices.

Research participants provided the following suggestions regarding legal information versus legal advice:

- Continue to provide guidance on legal information versus legal advice through trusted intermediary training

and resource materials.

- Discuss and test the extent to which workers should be encouraged and supported to venture into the “grey zone”.
- When developing strategies to address the challenge of the grey zone, take into account the diversity of community organizations in terms of sector, size, mandate, issues, budget, and clients. Consult broadly in order to develop meaningful responses.
- Create protocols and best practices on how to deal with issues that arise in the grey zone between legal information and legal advice.
- Consider privacy and confidentiality needs relating to client information when trusted intermediaries and legal service providers are working together for a client.
- Undertake additional work to understand the needs, current practices, and efficacy of interventions by trusted intermediaries to inform guidance on the boundaries of the role.
- Balance the need to support the grey area role of non-legal community workers with the need to address the shortage of available and accessible legal advice and representation.



The emphasis should be about what you can do to help rather than what is not authorized. There is still a degree of protectionism from the profession and a failure to understand the gravity of the access gap. We need to keep standards high but move access to justice forward. – Interview

2.3.9 Making a good referral

The range of people who participated in our research saw the role of frontline workers in making legal referrals as highly important. Referrals are clearly vital, but it is often difficult to make good ones. There may be few legal professionals available for referrals who specialize in the topic at hand, or it may be difficult to find information about and connections to the professionals.

While some community organizations have good relationships with clinic lawyers, the private bar, pro bono lawyers, community legal workers, law school clinics, or paralegals, and maintain lists to facilitate referrals, many others do not. Workers need training and tools for making good legal referrals, along with access to a larger pool of lawyers and paralegals who are familiar with poverty law and common legal problems.



When you refer clients to a lawyer, it helps to have a good relationship with that lawyer. When you follow up and you push them, you get results.

– Focus group participant



When one of my clients started a new job, she was no longer an eligible client for the community legal clinic. – Focus group participant



It is important to have Francophone community workers trained and accessible throughout the province, as Francophone clients often lack accessible resources.³¹

– Survey



Some issues can't be referred to a legal clinic, so who picks up the slack?

– Interview

A good list of potential referrals will only get a worker so far. The legal professionals on the list may not be able to assist due to the client's inability to pay legal fees (or ineligibility for a legal clinic or Legal Aid services), limited capacity to take on pro bono cases, or lack of time. Organizations also have the challenge of keeping their list current. Customized networking and developing one-on-one relationships with legal service providers are strategies that can help.

While some central directories exist, they may not provide enough relevant information for local community organizations to use. The Law Society and the *Association des juristes d'expression française de l'Ontario* (AJEFO) have directories that allow searches by location, area of law, and language. However, community organizations need something more to meet the pressing need for meaningful referrals for their clients. For example, they may need more information about specific areas of expertise, fee structures, geographic reach, and capacity to take on new cases. This is especially important when legal professionals are not already connected to community organizations.

The work of the trusted intermediary is difficult when they identify issues but there are no legal services to which they can refer clients. Often, there is simply nowhere to go. This is a particular problem in rural and remote areas. A Canadian study highlights challenges in access to legal services in rural and remote communities, especially for Indigenous communities, and explores self-help strategies.³² Similar challenges arise in other sectors. For example, a US study shows that community health workers could identify clients who need mammography, but in rural areas they could not effectively refer them to medical services. This significantly reduced the impact of their work.³³

The limited choice of legal service providers is especially problematic if clients want services in French or a language other than English or French, or if they need practitioners who understand a specific community (for example, the LGBTQ community). The lack of Francophone family law lawyers across the province was cited as an ongoing problem. Similar challenges exist for many other languages and cultural communities.

Ontario’s community legal clinics are a key resource. However, they don’t cover all subject areas, they may be far away from the client, and their resources are limited. Linking with the private bar is not feasible in many cases for reasons discussed earlier.

Some participants offered suggestions on how to address challenges related to legal referrals:

- Find ways to connect more legal service providers with community organizations.
- Create a coordinated legal referral program.
- Create and update, for community workers, referral lists of legally trained individuals who are confirmed as prepared to accept work in the areas for which they are listed.
- Create a list of lawyers and paralegals to access for areas of law related to poverty and marginalization.
- Remember that referrals work both ways. Legal clinics, lawyers, and paralegals need to know what community agencies have to offer for support.
- Improve collaboration between Anglophone and Francophone organizations so that more French-speaking people are referred to Francophone organizations.
- Create a landscape map of organizations focussed on justice for vulnerable people.
- Explore the use of technology to overcome challenges associated with building and maintaining referral lists manually.



The best referrals are when services are co-located so people just have to go down the hall for the referral, which means they actually get there. – Interview



SNAPSHOT: Parkdale Referrals and Community Partnerships

“Warm referrals”

The Parkdale Interagency Referral Network is a partnership of five community service agencies in the Parkdale area who have been piloting an online referral tool for the past two years. The agreement between the agencies is that a client’s first point of contact would be the means of accessing all agencies within the network, and that referrals between the agencies be “warm” referrals, so that the client need not explain their issue again to multiple agencies. Technical support is provided through Parkdale Community Legal Services’ involvement in a technology partnership of community legal clinics. – Survey

There is a longstanding partnership between Parkdale Community Information Centre and Parkdale Community Legal Services to organize workshops and community events. The

centre refers clients to the clinic for legal services and support; the legal clinic refers clients to the centre for form-filling and for other community resources. – Survey

2.3.10 **Follow-up**

Even if a worker is able to make a good referral, there is no guarantee that the client will follow up. Community workers emphasized the importance of following up in order to understand what happens after a referral is made or information is given.



I want to know what the outcome was. Was the referral appropriate? Did the problem resolve? Knowing about outcomes would help us to learn. – Focus group

2.3.11 **Sustaining knowledge**

Sustaining learning and knowledge is a challenge for individual workers and for their organizations. The law changes, and its implication for different contexts can also change over time. Staff turnover also comes into play. As people leave, their organizations lose knowledge and relationships that were sometimes built over many years.

2.3.12 **Systemic approaches**

Some focus group participants viewed the complaints-driven system of law as a viable remedy for only a very small group of individuals, at best. They believed that changing the law for systemic impact would achieve better results for more clients than supporting the trusted intermediary role. They would prefer to see funding going to programs to connect people and enable them to collectively seek systemic solutions that will ultimately benefit client groups as a whole.



We shouldn't focus on educating people about the law. We should advocate to change the law to help marginalized communities. – Focus group participant

2.4 Case study #1: Rural Justice & Health Partnership

Of the 200,000 people who live in the counties of Hastings, Prince Edward, and Lennox & Addington in Southeastern Ontario, approximately 32,500 are low-income residents, most of whom live in rural and remote areas. The Rural Justice & Health Partnership connects health care service providers with the Community Advocacy and Legal Centre, the legal clinic for this catchment area. The goal is to improve health outcomes and access to justice for people who are low-income, vulnerable, and marginalized.

The partnership embraces health workers as trusted intermediaries.

Health worker: It's tough to be all things to all people. In this kind of job, you really need to learn about things from a service perspective, because you need to be guided by the client and their needs – for how deep you go, for agencies and service supports in the area.

Underlying social conditions, including unresolved legal issues, have an impact on health.

Health worker: When the pieces of the puzzle come together, and people get the housing or disability benefits they need, there is a sigh of relief. It makes a big difference in their life, and lets them get on more with their health problems and improves wellness in general.

A health crisis often propels legal issues forward.

Health worker: You may have someone who is dying, who is functionally illiterate, whose family doesn't know how to cope and they don't get along at best of times, and the hospital is asking about a power of attorney. Patients need help with documents, with what it means to have power of attorney, and the process for putting that in place.

Legal clinic lawyer: When a client has a complicated family situation, or no family, a power of attorney can be so important. The person may not want to go down the hierarchy of substitute decision makers, or wouldn't want certain family members inheriting or handling their affairs. These are not simple, straightforward cases.

Timely intervention helps.

Legal clinic lawyer: We see a lot of clients where there is definite urgency to act. For lawyers the urgency to prepare documents also presents an interesting practice issue – you want to help quickly and right away, and you have a professional obligation too. For some issues, we may need to spend a lot of time.

“Legal is scary.”

Legal clinic lawyer: Often people are afraid to talk to lawyers. The health care worker can speak for us, and say, “It's ok to talk to the clinic.” They can do some of the groundwork and provide information about the legal help that's available. We see that information won't get to people any other way.

Health worker: The word “legal” is scary and services are not that available. But we are able to connect people with legal services in the community in a really positive way. We use a supportive approach, we're not threatening.

Training from the legal clinic and a “legal health checklist” help workers to flag legal problems in housing, social assistance, employment, workers compensation, criminal injuries compensation, human rights, consumer and debt, and powers of attorney.

Health worker: I know I’ve gotten better at identifying legal need. The coordinated care plan and user guide that everyone across the province is supposed to be using, in the legal section asks: “Do you have legal concerns affecting your health?” That’s good and will cover some legal aspects, but we could probably flesh that out. The legal clinic has expanded our scope and perspective around the legal lens.

Health workers learn what the legal clinic has to offer and how to make referrals. A service provider hotline provides quick access to a clinic legal worker for advice.

Health worker: The fact that I can send an email and get an answer back so quickly – it’s phenomenal to know that you have that resource, and to know that you’re not a burden or a pain.

Health worker: Knowing what the legal clinic can offer, if anything comes up for my patients or in my practice, and if I feel like there is any match with areas identified on the legal health chart, I’ll follow through with a phone call to determine if I’ve got it right.

Health worker: A primary benefit is the trust that’s been instilled in our legal partners. When referral comes from a health care provider they trust, the referral is also trusted. That partnership has been of great benefit to all of us.

Communication between legal and health workers helps the clients they share.

Legal clinic lawyer: For those clients that we share, it makes me think of the adage, “it takes a village....” It takes a team of different professionals, working together. It’s not enough to have just a doctor, just a nurse practitioner, just a lawyer. And you need a lot of communication between them. The project has helped create a safety net for people who really need it.

Health worker: I always have the legal clinic lawyer have a look at the client’s self-report alongside the doctor’s report for the Ontario Disability Support Program. We might then take it back to doctor. This is working really well. The exchange helps the doctor’s legal knowledge.

The partnership approach is empowering.

Health worker: The Justice in Health network has changed the way that we think about client problems. It makes us think we have hopeful resources for them. It is empowering for them to get help to resolve a problem. The legal clinic is extremely welcoming, open to providing support in whatever way that would be helpful to us. The heart that they bring to it is so evident.

For more information on the Rural Health and Justice Partnership, Legal Health Checklist, partnership documents, or training for trusted intermediaries, see <http://www.communitylegalcentre.ca>.



3. TRAINING FOR TRUSTED INTERMEDIARIES

3. TRAINING FOR TRUSTED INTERMEDIARIES

Community workers are best able to help clients with legal problems when they have access to training, tools, organizational support, and connections within and outside their sectors. Some workers have had the benefit of such support, but many have not. Without support, workers lack comfort in the role or may decline to perform it. While good work has been done in Ontario to support the trusted intermediary role, there is a need to build on promising practices, to share resources and create new ones, and to reach more people. With proper support, community workers can do more in this pivotal role—and do it even better.

3.1 What do we know about existing training?

3.1.1 Increase in training

There has been a lot of training in recent years to support workers in the trusted intermediary role, including projects funded by The Law Foundation of Ontario under “Connecting Communities” and other programs. Roughly half of the frontline workers in non-legal community organizations said they had taken training in the six training topics listed in our survey.

Training taken by frontline workers (%)	Yes	No	Total
Working with clients who have legal problems	47.5	52.5	100
Finding good legal information	52.1	47.9	100
Understanding the difference between legal advice and legal information	48.9	51.1	100
Legal systems and processes	47.2	52.8	100
Making legal referrals	39.7	60.3	100
Specific areas of the law	48.4	51.6	100

Table 7: Training taken by frontline workers (% of frontline workers)

Training initiatives have produced a variety of materials and delivery methods. Some organizations, through collaborative projects and partnerships, have developed networks that continue to build their capacity to help clients with legal information and with referrals to other resources and services. Initiatives are often customized to the wide range of environments in which trusted intermediaries work and the sectors and clients they serve.

3.1.2 How well is it working?

Although we did not conduct a formal evaluation of any training programs, some interview participants told us that trusted intermediary training appears to be helping. Frontline workers who completed our survey made it clear that they found such training helpful. Roughly 80% of those who had taken training in the six training topics listed in our survey found it to be “very helpful” or “helpful” in their work. In-person training, webinars, and online courses were all highly rated for learning about law-related topics.



SNAPSHOT: Workers’ Action Centre

“Training sessions for frontline workers”

The Workers’ Action Centre provides tools and supports to help community workers address some basic workers’ rights issues. They have a vibrant communications function, and they push out content on a frequent basis (they have nine issue-driven publications annually). There is an active email server, and they communicate about trending topics.

– Focus group participant

The Workers’ Action Centre website indicates that they provide “training sessions for frontline workers at community agencies to keep them informed on legislation and how to assist members in their communities who have a problem at work.” – Website

In interviews with people involved in “Connecting Communities” projects, we also heard that, in their view, training helped to flag issues and build understanding about legal matters in the agencies involved. It also helped to link people together and give them an opportunity to share experiences.

An especially valued benefit of training has been the networks created when workers connect at conferences and meetings. Opportunities for collaboration arise that promote ongoing relationships across organizations and communities.

3.1.3 Evaluating the impact of training

The need to evaluate access to justice activities has been highlighted in many studies. In the financial education and counselling sector, one study measuring the impact of education highlights some of the challenges in conducting evaluations, such as selection bias and the lack of comparison groups.³⁴ Questions arising from evaluations of education programs include whether education over time is more helpful than education provided “in a standardized format for a predetermined duration,” and whether “education models may be too shallow and lack opportunities for practice and follow-up.”³⁵

Several health sector studies discuss the difficulty of obtaining evidence of the effectiveness and impact of health sector trusted intermediary work.³⁶ One study points out the importance of community input in evaluating trusted intermediary work and resources in the health sector.³⁷ Another study provides a helpful definition of impact: “[Impact can also be called outcomes, achievements, or results. Impact is not the same as deliverables, descriptions of what the project did, or quality measurements of the project.”³⁸



It would be interesting to do an audit of what happens after people have done training in a subject area. Will they remember what they learned? How do they maintain the knowledge? Is ongoing training needed? – Focus group participant

In-depth evaluation can be challenging for many small nonprofits, as planning and conducting a thoughtful and useful evaluation requires financial and staff resources—and time. It is especially challenging to conduct an evaluation that focusses on impact as opposed to quantitative outputs. Some organizations have better tools to evaluate their activities than others do. Some hire external evaluators. Others do it informally, including through maintaining relationships with the target group.

We note that some organizations who received grants from the Law Foundation related to training trusted intermediaries have conducted extensive needs assessments and evaluations while others’ efforts were more modest. Needs assessment and evaluation costs are eligible for Law Foundation funding as a way to learn and improve and also as a way to help find other funding sources. In some cases, it is clear that projects achieved success in helping trusted intermediaries understand the law and, in turn, in helping their clients get better legal information.

During our interviews, literature review, and file review, we learned of promising evaluation practices in the sector dedicated to preventing violence against women. One of the evaluations assessed knowledge and attitudes objectively through a series of questions, before and after online training, that tested subjects’ understanding of the topics taught (conducted by Ontario Association of Interval and Transition Houses or OAITH). Another evaluation implemented three- and six-month follow-up surveys with workers after a training program for women experiencing violence and the service providers who help them (conducted by Luke’s Place). The Luke’s Place evaluation showed that the information workers shared had helped women to think and prepare differently, to feel more confident and less anxious, and to help with how they chose to deal with their lawyers. Results of the OAITH evaluation are mentioned in the following “snapshot”.



SNAPSHOT: Workers in Violence Against Women Shelters

“The evaluation design involved testing knowledge before and after taking the course.”

Shelter workers need to be well versed on legal issues and processes, especially related to family law, immigration, and criminal law. A lot of what women are dealing with is legally related, e.g. child welfare, custody, division of assets, immigration, and criminal matters, and they need to deal with part(s) of the legal system to get things done. In smaller communities, some workers have observed more criminal charging of women or dual charging. And not just for partner assault, other charges too, such as mischief and drug related offences. Sometimes a woman has a history of criminal charges which creates barriers, even though there are no current charges.

In shelters, workers look up legal information for people and try to help them in various ways. Transitional housing and support workers and family court support workers are the primary workers who provide support by going to court with clients, helping them get legal aid, or going with them to legal appointments. For non-family law issues, like landlord and tenant, they refer people to community legal clinics. For immigration issues, there are problems referring people outside the Toronto area, although settlement organizations can assist with some things.

Approximately 2,800 people have registered for the online training portal of the Ontario Association of Interval and Transition Houses (OAITH), described as a “learning management system” or “training hub.” You don’t have to be an OAITH member to participate – the portal is open to anyone.

The portal uses a system called Moodle, which gives you the option of making it elaborate and interactive or keeping it bare bones. OAITH chose to keep it simple, dispensing with add-ons and interactive features such as discussion boards. OAITH added audio for accessibility purposes. Where there is a picture, they include a written description of what the picture is to assist people using screen readers. All of the modules on the portal are “self-paced” in that learners go in when they want and there are no time limits for completion.

The seven modules from 2016 were developed in partnership with other organizations. One of the new modules, on sexual violence and the law, was done with METRAC. Until then,

OAITH had not done law-focussed training on the portal. The module covers sexual violence and the criminal court process. It is designed for service providers supporting survivors.

An external evaluation was conducted for the “foundations” course which provides competency-based learning for anyone wanting to work in the VAW sector. The evaluation design involved testing knowledge and attitudes before and after taking the course as a way to determine if learning had occurred. Virtually all participants reported that the skills learned in the training would be useful in their jobs.³⁹ This reinforces the benefits of evaluating training programs to increase the capacity of community workers.

– Interview

3.2 Benefits of training



The training experience is not just about knowledge transfer. It needs to connect people to a network of practitioners, peers, or experts they can reach out to at a later time or just in time. You don't know what information you need until you need it. – Interview respondent (training expert)

Trusted intermediaries value training that enhances comfort in the role and the capacity to perform it. Training that includes networking opportunities is invaluable. It is hard to generalize about in-person versus online training, but we heard clearly that both methods are useful, both should be used thoughtfully, and sometimes they should be combined. Ongoing training is essential to ensure up-to-date knowledge and support for the role. Two-way learning is also helpful, where community workers learn more about legal matters and legal professionals learn more about the people those workers serve.

The investment in training and supports for trusted intermediaries is based on the assumption that trusted intermediaries will develop and apply their knowledge and skills to common legal problems and related services over time. Training one trusted intermediary can therefore benefit many clients. In addition, trusted intermediaries may be better able to access and absorb information than people with legal needs who are likely in crisis or experiencing stress.

Trusted intermediary training helps frontline workers understand how awareness of a legal issue, and taking timely action to deal with it, can prevent escalation or further problems. It helps them become familiar with what a legal problem is, recognize the common kinds of legal problems in their communities, and identify legal problems for their clients. Training can also help workers understand the impact of legal help for their clients and how to provide information and referrals. Training can also underscore the importance of integrating knowledge within their organizations.

3.3 Ten training tips

During our research, we heard many suggestions about trusted intermediary training that community workers typically apply. We set out highlights below as “ten training tips.”

3.3.1 Consult to assess training needs

Needs assessment is important. This enables organizations to see what trusted intermediaries need and how training should be provided to be successful.



You have to sit down with an agency and ask, “What do you do? What types of legal problems do your clients have?” Then develop a tailored approach for that agency that relates to their business. – Interview



To be successful, you have to make sure that what you are building is really needed by your target market. Make sure you really understand the needs from the user’s perspective. – Interview

It is important to talk to people at community organizations and develop training packages based on their areas of need. The goal is to develop training that can be applied in practice and that responds to the organization’s approach to their work. Some will want and need more in-depth training than others.

Focus groups with frontline workers can be a useful tool to find out what workers need in their day-to-day jobs and how to integrate training with their workplace cultures. They can also help in learning what motivates workers to stay up to date and to train on a specific topic.

Consulting with local communities before organizing the training and adapting the content and format to the target group are also important considerations. Advisory committees can help to facilitate community feedback. In one project funded by The Law Foundation of Ontario, consultation with trusted intermediaries led to a change in how the project used intermediaries to reach victims of human trafficking.

In the Canadian legal sector, the Community Advocacy and Legal Centre in Belleville developed a “Spectrum of legal literacy and capability training for ‘trusted intermediaries’”⁴⁰. The Spectrum is used in planning legal education for trusted intermediaries by helping to situate where they are in their learning process.

3.3.2 Learn from training done by others

In developing training for trusted intermediaries, it is important to consider and learn from training that has taken place, including in other sectors and jurisdictions.

In Ontario, grants from The Law Foundation of Ontario for trusted intermediary training have produced a large volume of training materials for possible use and adaptation in future projects. The Law Foundation often requires grantees to review, use, and adapt what already exists.

The “Connecting Communities” website holds a repository of training materials from those projects, to the extent that the lead organizations have shared them. CLEO’s PLE Learning Exchange website produces and shares information about best PLE practices. The website has a growing volume of information about the (sometimes blurry) distinction between legal information and legal advice, integrated into various materials.

See Appendix B for additional information on what we learned about approaches that our research participants said were working well.



In the “Connecting Communities” project, training materials can be adapted instead of starting from scratch. There are shared evaluation tools and an advisory committee that supports new projects. – Interview



We can’t keep doing small projects forever. How can we scale this up?
– Interview

3.3.3 **Customize**

Training and supports for the trusted intermediary role need to be customized for different contexts and roles.

The best kind of training is responsive to the on-the-ground needs of workers within the relevant sector or community. Some training components and topics and approaches might work across the board, but most will need to be customized to reflect the diversity of organizations, frontline workers, clients, and specific work. For example, some intermediaries only deal with legal issues now and then while others are intensely involved day to day.

In some sectors (for example, in the literacy sector) it is common to train volunteers. In others, training opportunities appear to be for paid staff only. Training of volunteers helps to widen the connections, especially if they are providing direct services over a long period of time and form trusting relationships with clients.

3.3.4 **Design client-centred training**

We heard a strong message that initiatives to support frontline workers need to keep the client in the centre, focussing directly on meeting client needs, and recognizing that not all vulnerable clients are the same. One international justice organization advocates building “justice journeys that work for the users,” putting people in the centre and empowering justice institutions to provide leadership and stability.⁴¹



SNAPSHOT: Online and multi-media training, Queen's University

"It has to support learning outcomes."

The Faculty of Engineering and Applied Science at Queen's University has a dedicated Teaching and Learning Team that specializes in course development for both fully online and blended course formats. They develop courses for internal clients at Queen's as well as external clients in the education and training sector.

The unit employs a multi-disciplinary team-based approach. Teams are comprised of instructional designers, multimedia specialists, students, and course design and development specialists to create integrated course materials that are well aligned to course and program learning outcomes. Learning objects include video, animations, and other visually enhanced active learning approaches. The demand is growing to create blended courses that include the best elements of both online and face-to-face delivery methods.

"Students want more highly produced educational materials today. We are competing with YouTube and Netflix, and they don't want training materials that look old fashioned. Over the years, we crafted an approach that provides courses that are much more media-rich. One challenge with this approach is that it can be expensive and the Team has to continually challenge itself that they are not putting media creation as the number one priority. This is not about creating something "cool" for the sake of it; course materials have to support learning outcomes first. Pedagogy definitely drives the technology in our approach."

The Teaching and Learning Team works closely with the clients to create learning modules and courses that meet the educational learning outcomes that have been defined. Since 2014, the Team has been using the quality benchmarks provided by the industry-standard Quality Matters(tm) program to ensure that the approaches being used in the courses are supported solidly by the evidence in the educational research literature.

At Queen's University, they use a multifunctional integrated learning platform called Brightspace by Desire2Learn, a Canadian company. This platform allows the university to provide a high-quality full-service experience to learners where they can access their media-rich course material at any time, from any place and from any device. Learners use Brightspace for more than just accessing course material. They can track their learning progress and interact with teammates, industry experts, and instructors all from a single convenient platform.

– Interview

3.3.5 Offer two-way education

Two-way education between legal experts and frontline community workers can be mutually beneficial. It can help ensure that lawyers are more aware of the needs of vulnerable people who are served by community organizations. Involving lawyers and paralegals in trusted intermediary training projects is one way to make two-way education possible.



It is good to help the clinic learn more about what we do so they understand more about the clients we see. – Focus group participant

The concept of two-way education came up in our consultation, file review, and literature review. One paper discusses its importance for service providers working with transgender people.⁴² Two papers discuss engaging people with HIV/AIDS as “patient instructors” and “experts in HIV and their own health.”⁴³ Another study discusses reciprocal training between health, social, and legal professionals.⁴⁴

3.3.6 Use adult education techniques

Trusted intermediary training is mostly designed for adults (though not exclusively). One study, which focussed on financial literacy, noted that adults:

- Self-select and learn when they are motivated to do so;
- Filter and selectively attend to information they feel is relevant to them;
- Learn best by doing;
- Respond to guidance, not instructions; and
- Have independent ideas and experience that they bring to their learning.⁴⁵



It is not just about traditional, technical training. It is about consciousness raising and adult education techniques leading to action. – Interview



Case studies are always great—working through scenarios.
– Focus group participant

Trusted intermediary training often incorporates adult education principles such as these, and this should continue. Where possible, training that includes an interactive curriculum, experiential learning, and a hands-on component that connects to how people do their jobs in real life is ideal. Suggested techniques include case studies and role playing with former clients and others with lived experience, with appropriate supports to cope with any risks involved. Training works

best when there is a welcoming and receptive atmosphere. Training should also offer both theory and practical tools.

Inviting other agencies to come and talk about what they did to support their workers in providing legal information and referrals, and why it was important, can be motivating for agencies and individual workers who are unsure about why the training will benefit them, their organization, and most importantly, their clients.



SNAPSHOT: Law for Life – Skills Training, UK

“Can do”

Law for Life education and training focusses on trusted intermediaries as a way to meet the needs of the most vulnerable users most efficiently. The trusted intermediary training is broadly based on areas of law. This includes social welfare (there is a lot of need in the housing sector). They don't teach significant detail of law, but rather focus on key skills and concepts that are transferable across various areas of law (researching legal problems, negotiation skills, understanding different frameworks of law, e.g. the difference between civil and criminal, etc.). Then they will plug in how to access and use the digital service (“Advicenow”). The idea is to embed digital use in the community teaching context, build foundational legal skills, and then ensure that intermediaries can do the task of researching information online.

They don't use the “know your rights” model. Training focusses on building basic skills, such as how to research online from high quality and accessible online sources. They get people ready to make referrals to networks of formal legal services and more informal pro bono networks such as phone assistance.

What is it that an intermediary can do in light of the fact that specialist legal resources are so limited? Work such as recording a chronology, basic events, good referrals, to ensure that a specialist lawyer is best used.

– Interview

3.3.7 Provide ongoing and refresher training

Some participants in our interviews and focus groups also stated a strong preference for ongoing training, or an “education combo” that reinforces skills and knowledge from previous training (“even workers who use the information forget”) and explains what has changed. One suggestion was to have a regular, topically based education session for frontline staff a couple of times a year. This would be especially useful in areas of the law that change frequently, such as immigration. Regular training sessions would help to ensure that frontline workers are up to date and can network with peers and experts.



SNAPSHOT: Training of Family Court Support Workers

“Ongoing support”

“Our two-day training for new support workers starts with a basic introduction on issues of violence against women, especially those that arise at the time of separation. Then we provide an overview of the family court process and do safety planning. We go over issues that come up in family court cases and we emphasize the difference between legal information and advice.

Combining upfront training with ongoing training and support is essential. The workers have great discussions with each other online about how to deal with situations, benefitting from each other’s experiences. People work in isolated settings and need opportunities to network and connect. If the trusted intermediaries don’t get ongoing support, it would be unethical to give them upfront training.” – Interview

3.3.8 Involve multiple players

Many people spoke positively about formal and informal connections and partnerships, within and across community, legal, health, and other sectors. They said it was a key factor in supporting vulnerable people who have legal problems. Partnerships are important for the training of trusted intermediaries and for program delivery. Community workers do best when they have links and regular access to legal service providers such as lawyers, paralegals, and community legal workers. Good relationships among sectors and communities promote effective service delivery and up-to-date knowledge.

There are many benefits from bringing sectors together for training programs. For trusted intermediaries, that would include legal service providers, frontline workers, community partners from multiple agencies, and various specialists. Training together provides richer opportunities for knowledge transfer and for building networks to help workers provide better referrals to legal advice and other services.

One study observes that partnerships between legal and non-legal organizations are particularly effective in reaching target client groups, especially through community legal education. These community legal education sessions go beyond sharing information to helping to build trust between workers and clients. That trust ultimately improves outreach efforts.⁴⁶

Formalizing training, for example by offering certificates of completion, has been used in some cases and can be a motivating factor.



SNAPSHOT: Community Law School *“Certificate in Community Advocacy”*

Community Law School (Sarnia-Lambton) Inc. is a community organization dedicated to public legal education. It offers a range of programs and materials to train frontline workers, community advocates, consumers, grassroots organizations, and members of poor and marginalized communities in social welfare and consumer protection law. Its offerings include a Certificate in Community Advocacy. – Website and survey

Collaboration, coordination, and partnerships are important elements in effective service delivery models. This was a recurring theme, reinforced in our literature review, interviews, focus groups, surveys, and file review.

One evaluation report highlights the importance of partnerships and collaboration in the Access Alliance Multicultural Health and Community Services service delivery model in Toronto.⁴⁷ The Ottawa Community Legal Clinic Transformation Project is another example of a project involving trusted intermediaries where partnerships have been found to be important.⁴⁸ At “Connecting Ottawa,” a Partnership Agreement covers key aspects of the partnership such as building capacity, promoting collaboration, and improving opportunities for sharing and exchange.

One Australian paper confirms the importance of collaboration between legal and non-legal services, training of legal and non-legal workers, and practical tools such as screening tools (for example, legal health checks).⁴⁹ This paper also highlights the importance of conversations and coordination among funders, such as government and foundations, to better respond to people’s legal needs.

3.3.9 Build training into organizational activities

Building training about the law into conferences, events, or other gatherings that are already planned is a way to manage the cost of training trusted intermediaries, particularly in rural and remote areas. Combining training with existing planned events can mean that participants do not have to travel twice.



SNAPSHOT: Immigrant Settlement Sector

“Creating networks and building capacity”

OCASI – Ontario Council of Agencies Serving Immigrants – has 230 member-agencies across the province, whose approximately 14,000 staff provide services to immigrants, refugees and refugee claimants. The majority of staff are frontline practitioners, i.e. settlement counsellors, employment counsellors/job developers, and language instructors. OCASI training is based on a needs assessment of training conducted every two years. They also flag emerging or urgent issues for training.

When immigration or refugee law changes, OCASI does training on that, in conferences, forums, etc., because the topic is so related to the work. When it comes to the legal content of training programs, they partner with other organizations (e.g. community legal clinics). They have also worked with CLEO who has developed materials that OCASI disseminates to its membership.

OCASI has five types of training approaches:

In-person training: 100 sessions or more per year (e.g. on topics such as disability, LGBTQ). More and more, the in-person training has online components (blended).

Policy webinars: 5-6 policy webinars per year (e.g. on VAW, immigration law, anti-racism – whatever is topical).

Facilitated online training: 3-4 topics per year, 5-6 weeks each, run twice (e.g. mental health, sexual violence, domestic violence, immigrant youth employment). In the facilitated course on family violence, they bring in a lawyer to respond to questions.

Self-directed online training: This training can be accessed any time and includes automatic corrections. OCASI tries to convert most of its other training components into self-directed training after they are done, although some topics are solely delivered through self-directed training.

School of social justice: This is a policy focussed program run once a year. OCASI brings in 20 people from across the province. In a three-month period, they meet three times in person and four times in webinars. Each webinar covers a different subject area, presented with a subject matter expert. People apply to be one of the 20 participants. The school of social justice is the favorite model but it is a challenge to fund. It creates networks and builds capacity. Participants become experts and share their knowledge.

– Interview

3.3.10 Evaluate the effectiveness and impact

It is helpful to identify the desired outcomes of the training program at the outset and to conduct an evaluation to see how well they were met. One approach is to assess knowledge of topics covered by the program before and after it was offered.



Yes, there is information on the internet and some documentation to assist community workers. But we could greatly benefit from affordable, formal training or support. – Survey

3.4 Training considerations

3.4.1 Trainers

A question that came up in our research is whether training of trusted intermediaries on legal issues must be delivered by legal professionals or whether others could do the training if a lawyer or paralegal has reviewed the content. Some felt strongly that such training has to come from legal professionals. However, opinions may vary depending on the subject matter, such as core legal principles and related strategies versus less legally oriented skills like detecting problems and giving reliable information and referrals.

Some participants hoped that more private bar lawyers and paralegals would be willing to provide training on a pro bono basis. The challenge is how to find those who have relevant knowledge and experience in the areas of law that tend to arise with community organization clients and who also have the capacity to offer pro bono hours.

Some research participants believe that the “train the trainer” model works well. Others caution against using trusted intermediaries to train other intermediaries on legal issues.

Peer education is another strategy for knowledge transfer within marginalized groups. A health sector study based in the US focussed on the impact of peer nutrition education on dietary behaviours and health outcomes among Latinos. The study stresses the need for research to identify the optimal peer educator characteristics and the type of training they should receive.⁵⁰

3.4.2 Training materials

Training materials have to meet the needs of the participants. Generally, there should be a balance in the depth of training materials to avoid giving too much information too intensely. Frontline workers want clear, up-to-date training materials that include concrete information about legal processes and definitions of legal and technical terms.

One suggestion we heard was to produce a core set of training materials, in various subject areas, that allow for customization by organizations and include options for customized delivery.

3.4.3 Training content

The skills trusted intermediaries require can vary depending on their specific roles and sectors. A CLEO report provides examples of basic legal life skills that can be helpful for trusted intermediaries and their clients who are facing legal problems. The skills include note-taking and letter writing, Internet search techniques, and file keeping (how to organize information).⁵¹

Some participants in our interviews and focus groups suggested that training be provided on how to:

- Work with clients to garner trust and respect;
- Communicate with clients who are under stress and in difficult emotional situations;
- Explain things to clients who are not familiar with legal concepts;
- Explain legal concepts in plain language; and
- Help clients who have low literacy.

Others suggested training on:

- Basic legal concepts that all citizens might need to know;
- Issues facing people who are marginalized, including their lived experience;
- Questions to ask to identify legal issues;
- Steps in the relevant legal process (e.g. evictions) and options for resolving the problem;
- Providing help in filling out legal forms and preparing documents;
- Civic education on the political system and legal rights;
- What community legal clinics can and can't deal with;
- Resources to which workers can direct people; and
- The distinction between legal information and legal advice.

Many training programs for community workers already cover some of these topics. The Refugee Sponsorship Support Program, working with the Refugee Sponsorship Training program, has an interesting model. Their model uses a range of content types broken down into online training modules:

- Substantive knowledge;
- Process knowledge;
- Reaching out to experts;
- What to do when a group/refugee client needs more;
- Ethical issues;
- Interpersonal skills; and
- Impacts of trauma and vulnerability.

An interesting approach in the UK teaches about the boundaries between legal information and legal advice. Learners practise the types of questions they might hear as trusted intermediaries and discuss what they can and cannot do. The thrust of the approach is about what they *can* do rather than what is not authorized, exploring the full scope of what is permitted and how much can be achieved.

3.4.4 Training risks

Experience with trusted intermediary training reveals several training risks. These include:

- Unwillingness of some facilitators and participants to address certain subjects due to discomfort or insufficiently grounded experience in the topic;
- Inability to reach sufficient numbers of workers due to transportation challenges, especially in rural areas; and
- Mental health risks and the possibility of re-traumatizing participants who have gone through experiences similar to those of their clients.

In Indigenous communities and in the prevention of violence against women sector, it is common for leaders and workers to have experienced trauma. It is a widespread strategy to make counselling available to workshop participants to mitigate mental health risks. This is an aspect to be borne in mind in planning training for trusted intermediaries.

3.5 In-person and online training

Our survey asked frontline workers in non-legal community organizations how they would like to learn about helping people with legal problems. They could select as many of the options as applicable. The top two choices were in-person training (80.1%) and webinars and online courses (74.2%). There was somewhat less interest in external conferences and events involving multiple organizations or sectors (63.3%) and in-house courses (53.4%). Some people also selected self-study (36.2%).

While many people prefer in-person training, it is not always practical or feasible. It tends to be expensive and organizations can't afford staff time away from the office for a day or more. Organizations are increasingly moving to online training, which can be facilitated or self-directed, or a combination of in-person and online training. Ultimately, the choices must be driven by learning outcomes: what should participants be able to do by the end of the course?

How frontline workers like to learn (%)



Figure 17: How frontline workers like to learn (% of frontline workers)

One reason people tend to prefer in-person training is the opportunity for networking and contacts. Experts say it is now possible to offer this in the online world, but it requires considerable attention during the design and development phase.

Some people prefer online learning because of the convenience of attending from their workplace or from home. Webinars that allow people to be actively engaged can be very effective, as long as the delivery agent is dynamic.



As everyone is very busy with the workload, webinars and online access seem to provide more flexible schedules for us. We can access online training at home or in our office, which also saves the travel time to the training location. – Survey



Networking can happen if the training is online, but you have to be purposeful about that. – Interview

As a general principle, if the information load is heavy, and the learner just wants information and answers to questions, then online learning is fine. If the training is meant to be experiential or to generate ideas, then it is better to do it in person.

Offering training by videoconference, as opposed to in person, can also be an effective strategy to manage training costs. Many organizations stretched for delivery options use online learning because it is practical, but they also find opportunities to bring people together by piggybacking onto other events.



No one can come to training if they can't leave their desk.

– Interview

One study notes that online learning has mushroomed. It indicates that “blended learning” may become a preferred way to organize existing classrooms, where students spend some of their time online and some in a traditional classroom. It also advocates for education that is more tailored to the needs of particular students.⁵²

We heard a strong message that a mix of online and in-person training is desirable. Mixing online modules and resources with some in-person activities acknowledges the challenges of distance, but still provides some opportunity for people to meet others they can link with, share in-person learning experiences, and become oriented to online tools. The recording and posting of in-person presentations is also helpful for people who cannot attend such events.

A mix doesn't necessarily mean that a single training program has to offer both online and in-person training. It may also mean that an organization can offer online training to convey some types of skills and knowledge and in-person training for other types.

3.6 Next generation of training

There is merit in continuing and sharing training approaches that have worked well, but some people we spoke to questioned whether it is time to consider broad-based training components that could benefit a wide range of sectors. Features of a “next generation” of training for trusted intermediaries could include:

- Generic core course curriculum on common legal topics (such as housing), which can be customized within specific sectors or organizations;
- Training different sectors together on common components;
- Collective or cross-sectoral group training, including refresher training, that promotes networking and builds capacity for trusted intermediaries in small or isolated communities that typically do not have the benefit of training and other opportunities; and
- Common evaluation tools for trusted intermediary training.

3.7 Case Study #2: Indigenous Human Rights Training

The Ontario Federation of Indigenous Friendship Centres (OFIFC) is a provincial Indigenous organization representing the collective interests of Friendship Centres in towns and cities throughout the province. The vision is to improve the quality of life for Indigenous people living in urban environments. The OFIFC administers culture-based programs delivered by local Friendship Centres. Program topics include justice, children and youth, health, family support, long term care, healing and wellness, education, and employment and training.

The Human Rights Legal Support Centre provides free legal advice and assistance to individuals who have experienced discrimination in communities across Ontario. The organization recognizes the history and disadvantage of Ontario's First Nations, Inuit, and Métis peoples and that Indigenous peoples have not traditionally used the human rights process. As a result, it has established an Indigenous outreach initiative and developed culturally safe guidelines for serving Indigenous people.

These two organizations have worked in partnership, with funding from The Law Foundation of Ontario, to design and deliver Indigenous human rights training for leaders and frontline staff in Friendship Centre communities and from other Indigenous organizations. Participants are trained on how to identify and name discrimination, seek support, and pursue remedies.

The Ontario Human Rights Commission promotes understanding and awareness of human rights and compliance with the *Human Rights Code*. The Commission has a mandate to conduct public education throughout the province and engages in a wide variety of education and training initiatives.

Five voices appear in this case study.

• Policy advisor	Ontario Federation of Indigenous Friendship Centres
• Community developer	Organizer and community participant in the training
• Indigenous student support worker	Community participant in the training
• Legal counsel	Human Rights Legal Support Centre
• Senior manager	Ontario Human Rights Commission

“A lot of us experience forms of discrimination.”

Community developer: A lot of us experience forms of discrimination and we ponder it. You wonder, is there something illegal about it, is there some redress? In the moment, you feel silenced: “I hate that this is happening but I don’t know what to do with it.” You sit with it personally but in that moment you don’t react. There is need for community members to be able to talk to someone about that, someone who can say, “Your gut instinct is right, we need to address this so that it doesn’t happen to someone else.”

Policy advisor: Friendship Centres have a long history of people meeting together to share experiences and find support. That was the foundation of what Friendship Centres are today - Indigenous hubs in towns and cities across Ontario. When a person steps through the doors of a Friendship Centre there are many services they can access. Friendship Centres serve people who are dealing with legal issues on a day to day basis. They don’t have people who are legally trained on-staff, but they have skills to help and Indigenous community members feel comfortable accessing

the Friendship Centre for those services.

Indigenous student support worker: I came out of the training feeling confident that if someone came to me with an issue, I could help. I have the pamphlet and resources, and here is where you can call. These people are there and I have a sense of how they work. I was able to get copies and share them with others. I've posted the material in my offices.

The two organizations worked together to design the training.

Policy advisor: Beforehand we talked about what would work. To understand the grounds of discrimination under the Human Rights Code, social areas, what kind of probing questions would you ask? As dry as legal information can be, we made sure there was some application in scenarios and breakout groups.

Legal counsel: Our project comes from what we have learned about Indigenous communities, lack of trust in the legal system, barriers to the legal system, and our own knowledge. You have to have Indigenous people on all levels doing the work, working together. It was a good partnership for us. They helped us more than we helped them. The OFIFC were willing to lend their credibility, and that was so important. We had to work together.

It matters what you teach and how and where you teach it.

Community developer: The session was really well received. People got a lot out of it and wanted more. When they see on the poster that it's being held in a place that people are familiar with, and they know the calibre of the training being offered, they'll want to make sure someone goes so information is brought back to their organization.

Legal counsel: The training covers a general picture of the Ontario human rights system, the Human Rights Code, social areas, grounds. I would give examples, explain the process and timeframes, and kinds of remedies. I would always try to relate something to their roles. I would use examples from their work, and through the entire training when people were asking questions and giving examples, I would always loop back to what they do.

Policy advisor: We try to be hyper aware of diversity in communities, across Ontario. We used general examples of situations, and also tried to elicit feedback from each community about what was happening locally, where they are seeing discrimination the most in their own experience. We definitely saw some trends in different instances. That showed the need to do the training across the province. In the northwest, we hosted the training at the Ne-Chee Friendship Centre in Kenora and had participants from the Friendship Centres in Sioux Lookout, Dryden, Fort Frances, and Red Lake. That training was much, much different from what we heard in London.

Trainers have to inspire trust.

Policy advisor: One of the most effective tools in the training is the lawyer herself, standing up in front of 30-40 frontline workers. She is Indigenous and works in human rights law. We felt proud to know that she is doing this, that she has the role she has, and that she is an Indigenous person who is bringing her skills to the work. There is a lot in the emotional relationship to the person who does the training.

Legal counsel: The OFIFC organizer always started by explaining the training partnership and that helped with their trust of me. I'm visibly native but I come from a big organization they don't know anything about. We usually did a round of introductions, which always took up a lot of training time but was important for relationship building

Community developer: It's a burden for Indigenous people to have to process in their mind how they're being interpreted by non-Indigenous people. If you are with an Indigenous person, there is a trust that they share an understanding of the history.

You need to be candid about the law.

Community developer: The training really pulled back the curtain on what it would be like to go through the process. The most valuable piece was the opportunity for participants to hear one another's stories. My friend went through this process and she was really intimidated.

Legal counsel: Our human rights system isn't built on Indigenous values of collectivity and collective rights, but on individual rights. I frame it as a tool you can use and not the only tool. I answered their questions in training – I told them what has happened in my experience in similar cases.

Policy advisor: The Indigenous lawyer is very candid in her training, and points out problems and critiques.

Legal counsel: Some had detailed and important questions, and some would say, "These are the problems that we foresee with this process." A lot of the candidness I could offer came from their questions.

Indigenous student support worker: We've been blocked before when trying to pursue certain services. The training gave us tools to advance some of those roadblocks.

There is value in meeting in person.

Legal counsel: It's important that the training was in person. That helped build the trust, especially for Indigenous communities where relationship building is so important. Everything takes a long time because you are building a relationship. During the training, sometimes it would take a while for the questions to start.

Community developer: We opened with a prayer from an Elder who really gave it a grounding, that we are here for an important topic. The size of the group and the comfort level were helpful. The lawyer's examples about actual cases were so important. I can't picture being able to get that much out of the training by reading it in a module online or watching a video.

Learning from the experience

Indigenous student support worker: In the training there was opportunity for people to critique what had been done so that the process can continue to evolve.

Legal counsel: The Ontario Human Rights Commission are interested too. They care about human rights and have done a lot of training, but they need to build their own relationships. I shared with them what I was doing.

Senior manager: The Ontario Human Rights Commission has done other training work with the Human Rights Legal Support Centre, who have dedicated people focussing on Indigenous issues. The Commission has been able to leverage those connections. That is a big help in establishing our credibility for other training we have planned.

There may be a connection with an organization, but when the people change, those new people will have to go back and build their own relationships. Hopefully the organizational connection will make the work easier, but there is something very important about connecting and establishing trust personally.

Policy advisor: Because of this training, we've identified other possible trainings, including partnering with the OHRC to cross-train between our organizations. It's funny that there was not much action in this area before, when now we see the potential and our connections are flourishing.

For more information:

Ontario Federation of Indigenous Friendship Centres <http://www.ofifc.org/>

Human Rights Legal Support Centre <http://www.hrlsc.on.ca>

Ontario Human Rights Commission <http://www.ohrc.on.ca>

Human Rights Video: <https://www.youtube.com/watch?v=S4JD7b7Uce0>

4. OTHER WAYS TO SUPPORT TRUSTED INTERMEDIARIES

4. OTHER WAYS TO SUPPORT TRUSTED INTERMEDIARIES

Training is not the only way to support trusted intermediaries, and training, on its own, cannot offer all the support necessary. This section briefly discusses what we heard about other strategies to support trusted intermediaries. See also Appendix B, which briefly describes tools already in place that research participants said they find useful.

4.1 Legal information resources

Trusted intermediaries benefit from legal information and materials that help them understand information about common legal problems their clients face and share that information with clients who need it. Research reveals that community-based trusted intermediaries value practical tools such as information sheets and checklists in addition to theoretical knowledge and research. These and other tools can be a valuable adjunct to training.⁵³



Legal jargon is complex. We need to make law more accessible.
– Focus group participant

Some of the frontline workers we spoke with said that they prefer legal information that:

- Exists in easily accessible online format;
- Is available in both official languages and other languages spoken by clients;
- Can be used in an interactive way; and
- Is in plain language, not legalese.

One paper we reviewed discusses the risks of unreasonably high expectations of what can be achieved through community legal education and information. The paper notes that one risk is “the political temptation to rely on relatively simple and relatively inexpensive strategies to improve access to justice, without taking into account the barriers people face in successfully resolving their legal issues.” Another risk noted in that paper is the failure to sufficiently consider how to match community education strategies with the varying needs and capabilities of users with legal problems.⁵⁴



SNAPSHOT: Nishnawbe-Aski Legal Services Corporation

“Know Your Rights”

Nishnawbe Aski Legal Services Corporation (NAN Legal) has developed “know your rights” cards over the last three years, that they distribute amongst Indigenous communities at events, schools, and wherever possible. They have become very popular as a tool to develop awareness. It is an ongoing battle, however, to get everything translated into the three language groups.

NAN Legal is also involved in training. Online training is used more and more, which gives everyone a common training experience.

“It’s easy to develop programs; what’s hard is getting it on people’s radar, getting them to use the tools, and getting the learning into their work.” – Interview

4.2 Access to help for frontline workers

In our consultation, community workers told us that they would like to be able to access legal assistance when they need it to feel confident about providing legal information, referrals, and other assistance to their clients.



The expectation is that the worker will be able to contact a lawyer, pick up the phone, and ask questions. There are things that might not be covered in the training, and they will have more questions. – Focus group

Several people offered the following ideas to make this a reality:

- Have “legal navigators” available by phone or email to support frontline workers. The navigators could be paralegals or lawyers, depending on the required area of expertise.
- Identify and learn from the go-to people in communities.
- Establish a place that community workers can call for legal information.
- Improve visibility of legal information providers.
- Create a hotline or advice line that trusted intermediaries could call with their questions.
- Use public libraries to greater effect.
- Situate legal and non-legal workers in community hubs



SNAPSHOT: St. Mike's

"I can email the lawyer"

St. Michael's Hospital in Toronto has a health justice program that includes a partnership with community and specialty legal aid clinics. A full-time lawyer works directly with the family health primary care team (80+ family doctors). She provides direct services on a range of issues.

"The lawyer increases our capacity to address and identify legal issues within the health world. Only one lawyer and one legal support staff for the whole team – but it has been amazing to have her there. I can email the lawyer and say this is what is going on, where do I turn? It saves time and improves the level of care for health care providers to help their clients." – Interview



SNAPSHOT: Pro Bono Ontario

"Training to spot legal issues"

Pro Bono Ontario supports medical professionals through a program that embeds triage lawyers within clinical teams at five children's hospitals across Ontario. The program trains clinicians (social workers, doctors, nurses) on how to spot legal issues and make effective referrals to onsite Triage Lawyers. In turn, the Triage Lawyers give summary advice, brief services, and referrals to additional legal services for patients and their families.

"Our goal is for medical professionals to think, 'there is a legal element to the problem my patient is describing, and a lawyer is down the hall who can address it.' It's important for a lawyer to have a presence at the site or program. Our clients are overwhelmed, and every additional step they need to take to get help is an opportunity for them to slip through the cracks. Medical professionals see the social determinants of health and we see unmet legal needs. But, really, we're serving the same population suffering the ill-effects of poverty, so we are a natural fit."

PBO would like to set up a similar arrangement with schools to do legal health checks with students and their families.

– Interview



SNAPSHOT: “Connecting Ottawa”

“Wrap-around approach”

“Connecting Ottawa” aims to improve access to justice for linguistic minorities. This includes people who are not proficient in English or French or who face communication challenges as the result of a disability or sensory impairment. The program has a social worker, lawyer, and program manager on staff and uses volunteers to help people navigate the legal system.

The program works with frontline workers in multiple ways: training, support on complex cases, case management, information sessions with experts, legal information, help in filling out forms, and being available for ongoing consultation.

“This wrap-around approach has helped to build frontline capacity in dealing with the complex legal needs of immigrants, including the provision of basic legal information and referrals.”

“Connecting Ottawa” involves a network of over 50 community health, legal, immigration, disability, and social services agencies and community organizations.

– Interviews

4.3 Technology

Public legal education and information providers in Ontario have been moving to technology as a platform to access information. “Steps to Justice”⁵⁵ is a recent example of this trend. In an interview, one person suggested the development of a mobile app to help frontline workers quickly find the information they need in their trusted intermediary role.

4.4 Communities of practice for frontline workers

Some participants suggested ongoing communities of practice for groups of frontline workers who have been involved in similar training. Provincial associations in Ontario’s nonprofit sector do some of this already. They could be the leverage point since their members are on-the-ground trusted intermediaries. Some of this type of networking has been fostered by the “Connecting Communities” program.

4.5 Client networks and peer support

Some studies discussed peer support programs in which clients receive help and support from each other. One such study described success factors of a peer delivery model for public legal education and information:⁵⁶

- Cultural appropriateness of materials and delivery;
- Focus on empowerment;
- Careful selection of peers (who are not in crisis themselves);
- Role modelling by instructors; and
- Use of community networks and personal contacts.

Another study highlights the benefits of peer support for clients in the housing and mental health sectors:

- Absence of judgment because peers experienced similar mental health issues;
- Improved health and well-being; and
- Better access to services and support.⁵⁷

Access Alliance in Toronto is an example of an organization that developed a peer outreach program and education curriculum for newcomer women.⁵⁸

The Peer Navigator Program, a community program that helped people with the Ontario Disability Support Program (ODSP), is an example of a client peer support program that was offered in the income support sector.⁵⁹ Another example is a program involving prison inmates in Nairobi, who provide peer support and act as trusted intermediaries in prisons.⁶⁰



We all want to connect, form networks, and transfer existing knowledge; it's just very time-consuming and hard to do. – Interview

4.6 Next generation of other support

In addition to training, innovations for other types of support need to be generated and nurtured. Areas for innovation include those that harness opportunities from new technology, emerging public legal education trends, and models for community connections.



5. PARTNERSHIPS WITH THE LEGAL COMMUNITY

5. PARTNERSHIPS WITH THE LEGAL COMMUNITY

People we consulted see the benefits of legal professionals working collaboratively with frontline community workers. For example, one lawyer we spoke to noted a big difference between clients who come alone and those who are accompanied by an intermediary.

5.1 Community legal clinics

Many of Ontario's community legal clinics are role models in working with non-legal community organizations. We heard numerous examples of positive collaboration, innovative tools, and formal arrangements between community organizations and legal clinics that support the role of trusted intermediaries. Clinics are frequently involved in training community workers and have formal arrangements to jointly address the needs of low-income people in their communities. Clinics find ways to extend the reach of their services, recognizing that case-by-case service delivery is not sufficient to meet the needs of their communities.



Legal clinics are a tremendous resource. Their mandate includes outreach to communities and training. – Focus group participant

Ontario is fortunate in having a system of community legal clinics for people with low incomes, funded primarily by Legal Aid Ontario. The mandate of community legal clinics includes community outreach and public legal education and information for their communities. This means that they work closely with nonprofit community organizations. They are a key resource and referral option for frontline workers. The challenge is that the legal clinics do not handle all types of legal advice and can provide services only to people who meet their financial eligibility and other criteria. The demands on their time, primarily casework demands, put pressure on the extent of community outreach and training they can undertake.

An Australian study, focussing on the United States and Canada, concludes that Ontario has an impressive community organizing tradition within the community legal clinic system.⁶¹

Good results have been achieved when legal clinics are part of community coordinating groups. Workers learn about each other and learn how to make better referrals. Where clinics are actively involved, workers get to know and trust them and start to call them to see if they can help with a client's legal problem. In particular, we heard from some frontline workers that community hubs and co-location with a legal clinic produce excellent results. With co-location, workers are knowledgeable about legal issues and referrals are easy to facilitate.



SNAPSHOT: HIV & AIDS Legal Clinic Ontario (HALCO)

“Training for service providers”

HALCO hosts free information sessions and workshops for community members, service users, and outside agency staff. Topics include social assistance, housing/rent, immigration, consent/disclosure, and more. The Committee for Accessible AIDS Treatment (CAAT) works with HALCO to provide training on HIV and Immigration to service providers and service users throughout Ontario. – Survey

HALCO has mobilized the HIV/AIDS community service organizations in many communities across the province and has partnered with local infrastructure when delivering on a province-wide mandate. – Focus group participant



SNAPSHOT: “Connecting Communities”

“Links between legal and non-legal organizations”

“Connecting Communities” is a partnership of legal and community organizations. It aims to improve the capacity of frontline workers to provide legal information and referrals for clients who are linguistic minorities or who live in rural or remote areas in Ontario.

“Connecting Communities has helped to build understanding about legal issues within community organizations and to build links between legal and non-legal organizations.”

Completed trusted intermediary training projects under “Connecting Communities” have involved 3,688 participants and 91 project partners. The program is coordinated by CLEO.
– Interviews

Some clinics have made an effort to visit community agencies on a regular basis and to be available to meet with people in the community about their legal needs. This practice has been difficult to maintain because of the volume of case work clinics take on. One clinic talked about being “out there” as a matter of practice, establishing relationships and making themselves known in the community in order to be a “go to” resource, trainer, and partner.

It can be a problem when frontline workers simply refer people with legal questions to clinics. If frontline workers are not able to answer basic questions, such as questions about tenant or employee rights, the workload increases for local legal clinics who are already stretched thin. It is helpful to clinic staff when clients have some basic information before they are referred to the clinic.



Local legal clinics can handle only so much intake, and intermediaries get lots of legal questions. – Interview

As much as workers and clients can learn from legal professionals, the reverse is also true. Clinics who work closely with community groups find that the learning is a two-way street. They learn about the people they serve and the other supports their clients receive, which enables them to provide better legal assistance to vulnerable groups.

In our interviews, focus groups, and survey, we heard about many positive examples of collaboration between community legal clinics and non-legal community organizations with regard to training, referrals, and other activities. Here are just a few examples:

- A variety of clinics have provided training, workshops, and information events in collaboration with community organizations.
- CLEO was frequently cited as a place where workers turn to get legal information to share with clients, through pamphlets and web-based tools such as “Your Legal Rights” and “Steps to Justice.”
- The Legal Health Check-Up, developed by Halton Community Legal Clinic, was noted as a strong model. It has been adopted by other communities to identify whether clients have legal problems.
- The Parkdale clinic has worked with community partners on the Parkdale Common Referral Protocol. Referrals go both ways. Community organizations refer clients to the clinic for legal assistance and the clinic refers clients to a community organization for form-filling and other community resources.

Please see Appendix B for many more examples.

5.2 Lawyers and paralegals

During our interviews and focus groups, we heard inspiring stories about private sector legal professionals who have formed strong relationships with community organizations to meet the legal needs of vulnerable client groups. At the same time, there seems to be a high degree of untapped potential for involvement by more lawyers and paralegals who are in private practice.



Legal clinics don't practice in every area. Where is the ability to meet other high needs that can't be met by the clinics? – Focus group participant

The reality is that frontline workers often have difficulty finding legal professionals who can help them and their clients. There are many lawyers and paralegals outside the legal aid and community clinic system who have a strong social justice orientation, but there may be challenges that restrict opportunities to support community workers acting in a trusted intermediary role or to assist vulnerable clients. Barriers could include the costs associated with private practice, limited capacity to offer pro bono services, and difficulties in making connections and matching legal expertise with the needs of a community organization.

The reality is that many people do not have legal representation because it is too expensive. There is limited access to Legal Aid certificates, funded programs offering free or low cost legal services, or pro bono legal services. According to a Canadian legal academic, the price of legal services needs to be addressed as part of discussions around access to justice.⁶² To reduce the price, he suggests that costs involved in providing legal services must be examined and models developed to reduce these costs.⁶³

It is important to acknowledge the significant access to justice role of Legal Aid Ontario for eligible low-income clients. In addition to funding independent community legal clinics, Legal Aid Ontario offers services through private bar lawyers working under Legal Aid certificates in criminal, family, and refugee law. Duty counsel are available in certain courts and tribunals. Legal Aid Ontario also operates helplines and participates in community hubs.

Help from a trusted intermediary may be the only assistance some people will get with their legal issue. Intermediaries connected with paralegals or lawyers with relevant experience would probably be better able to help their clients. By supporting and partnering with trusted intermediaries, pro bono legal professionals indirectly help large numbers of low-income and vulnerable people.



SNAPSHOT: Hamilton Community Legal Clinic

“Social impact from the private bar”

The Hamilton Community Legal Clinic interacts with a large private bar firm – Ross, McBride (Hamilton). The firm was part of the Pro Bono Ontario hospital project which demonstrated the opportunity to have a broader social impact and led to its partnership with the Hamilton clinic. They don’t want to duplicate efforts of clinics: “Let’s find something clinics would really appreciate help with,” and act in areas such as human rights and employment.

The Hamilton clinic also participates in the Hamilton Law Association on the Continuing Professional Development Committee to ensure that clinic areas of law are included in presentations over the year. Networking with the private bar allows the Hamilton clinic to do training and teaching which, expands private bar confidence to engage in poverty law areas when called upon. – Interview

In getting to know the paralegals and lawyers, intermediaries would also gain a larger pool of legal professionals to whom they could refer clients in some cases or for some aspects of their legal problems, especially when the services are available pro bono. The advent of unbundled legal services is seen as positive because it increases the chance that people can be legally represented, at least for particular components of their cases.



In general, more lawyers outside of Legal Aid Ontario and the clinics need to participate. – Focus group participant

A few participants offered suggestions on how to increase the involvement of legal professionals in private practice to support trusted intermediaries:

- Develop a mechanism to link trusted intermediaries with pro bono lawyers, whether online, over the phone, or via a chat group.
- Increase the engagement, especially in rural areas, of local lawyers who will agree to train workers in shelters, mental health organizations, health care, etc.
- Ensure that clients who are not eligible for Legal Aid are aware of alternative practice models such as unbundling and legal coaching.

- Increase the role of local lawyers with relevant experience in providing the training and being available afterwards to respond to questions.
- Convene a roundtable with a variety of lawyers and paralegals, including the private bar and clinics, to discuss roles, responsibilities, and cautions in supporting trusted intermediaries.

5.3 Professional regulation

Over the past few years, the Law Society of Ontario has discussed various strategies to improve access to legal services.⁶⁴ Some strategies, such as limited scope retainers (unbundling), have been adopted. Others, such as allowing lawyers and paralegals to provide legal services through civil society organizations, such as charities and not-for-profit organizations, have been approved in principle.⁶⁵



We need to keep standards high but move access to justice forward.
– Interview

Some consultation participants suggested that the Law Society could “loosen up” on the rules regarding what constitutes unauthorized practice of law since it is not rational to devote high-level legal services to all problems.

A study focussing primarily on the US discusses common features of statutory and common law prohibitions on the unauthorized practice of law. It argues that the current approach is too broad and that the civil justice system is unduly lawyer-centric. The paper advocates making legal proceedings more accessible to parties not represented by a lawyer, including assistance from non-lawyer services and consumer protection through regulation outside the legal profession. “From the standpoint of the public, the objective is more access to justice, not necessarily to lawyers.”⁶⁶

Another study includes a comprehensive discussion about licensing legal advice. This study describes Canada’s approach to regulating provision of legal services as restrictive (akin to Australia, France, and the United States), in contrast to other countries such as Finland and Sweden that are described as having more open legal systems.⁶⁷ More open legal systems provide “a broader range of sources for legal assistance,” restrict who can provide legal representation but not legal advice, or do not restrict who can provide legal advice or represent someone in court.⁶⁸

Canadian studies highlight the importance of exploring innovative ways to regulate legal services in connection with other types of services: “[A] key aspect of innovative regulation is getting out of the way and encouraging lawyers, and others, to innovate in how legal services are delivered.”⁶⁹ Regulators must be careful not to worsen already existing access to justice challenges.

5.4 Next generation of community and legal partnerships

Many benefits have accrued from ongoing, two-way partnerships between organizations in the legal and community sectors. It will be important to support existing partnerships and to create new ones that engage a broader range of legal practitioners and frontline workers for the benefit of vulnerable clients.

5.5 Case Study #3: Family law connections: LGBTQ Parenting Network

The LGBTQ Parenting Network, a program of Sherbourne Health Centre in Toronto, promotes the rights and well-being of lesbian, gay, bisexual, trans and queer parents, prospective parents, and their families and children through education, research, outreach, and community organizing. The goal is full inclusion of LGBTQ families in communities and institutions.

LGBTQ community members, and people who help them, need family law information.

Health promoter: Often LGBTQ parents just don't know how family law affects them. They may get inaccurate information from their peers and absorb it. For example, they assume they have no parental rights and obligations if they are not biologically connected to their kids.

We created a brochure explaining birth registration, declarations of parentage, and surrogacy. We try to explain the difference between having a name on the birth certificate vs. actual proof of parentage. We set up a system for people to muddle their way through a second person adoption. We have a kit with step-by-step instructions.

We did webinars for trusted intermediaries. In the trans community, trusted intermediaries are not necessarily in an organization; it's more informal. We created tip sheets for parents and trusted intermediaries, and an introduction to family law.

Family lawyers need to know about LGBTQ issues.

Private bar lawyer: Looking at the research, going to trans community workshops, then making connections to those who've done the research about the experience of trans youth, I learn more. When I can go out and understand the experience of others, it helps me to be a better lawyer, better able then to give a wider voice to the claims I am making.

Health promoter: In family law, a lawyer might not know when an issue could be a real problem, like a custody agreement that recognizes a known donor as a parent. Lawyers often don't understand the complexity of the identities of trans clients, may not have the cultural competencies to welcome them, and don't understand their different needs in terms of legal strategy. We did four webinars for lawyers and paralegals and created a briefing note for them.

“Access to lawyers is relationship driven”

Health promoter: A good referral includes finding a lawyer who knows the area of law and understands. It's often a challenge to find lawyers who have the right expertise, so most of our clients have few options for representation. Most people cannot afford representation, even if they can find someone who has the expertise.

Where do you go for novel human rights and family law issues? If someone has a compelling issue that will raise public interest, or provide a test case, they might be able to find a lawyer. When we get interesting cases, I phone lawyers and beg them to represent the clients. Access to lawyers is relationship driven.

It would be great to have a legal clinic around LGBTQ needs, as well as more places to refer.

Lawyers can help to move the law forward.

Health promoter: Recognizing how gender presentation, race, and parental status all work together in institutions

is quite complex. There are few regulations that are discriminatory on their face, but many regulations and practices result in discrimination that is very hard for LGBTQ people to address. We need a different approach when issues of human rights and family law intersect, and we need practitioners with more expertise in this area so that we can move the law forward.

The LGBTQ Parenting Network has a longstanding connection with a private bar lawyer.

Health promoter: The private bar lawyer we work with so often has been our trusted advisor for years. She has assisted us in preparing legal education documents, from pamphlets and info sheets, to legal briefs for lawyers representing trans clients. She has donated her time for our LGBTQ Family Planning courses about what people need to know as LGBTQ parents.

Private bar lawyer: When something comes up that is new and concerning, LGBTQ Parenting Network staff make contact with me. It helps me to know where people's concerns are. And it helps that I am a community member myself – I get it, I live it. It's very much a relationship of mutual trust and respect. We talk all the time. We have a long history of working together, an ongoing trust and rapport.

A non-legally trained worker can assist clients with legal problems.

Health promoter: Clients can see me and show me their forms, and I will comment, and give them confidence. Often times court staff don't want to help them with the forms. Mostly I see self-represented litigants. I don't act on their behalf. I do a lot of referrals.

Private bar lawyer: On a recent case, the health promoter reviewed a background factum, attended in court, and made connections with another community group. He knows a huge amount, and knows the difficulties on the ground.

Health promoter: I helped one client by speaking to the clerk in family court about the name to appear in an adoption court order. The client was transitioning and waiting for a legal name change. The clerk spoke to the judge who made sure the documentation had the correct name.

Solving problems before they start.

Private bar lawyer: When the government was developing a portal about paper registration of births, the LGBTQ Parenting Network provided valuable input so the portal would be more suitable and more accurate for LGBTQ families. The health promoter was excellent at ensuring plain language and avoiding legal jargon. I connected with the government law office. By working together, we helped to solve problems before they started.

Everyone benefits from the connections.

Health promoter: We share information in multiple directions. We can give health information to a lawyer and direct them to a resource. We can share information with the client about the law. The client may not perceive their situation as a legal issue, and may just need help finding a lawyer.

For more Information on the LGBTQ Parenting Network and the Sherbourne Health Centre, visit: <http://lgbtqpnp.ca/> and <http://sherbourne.on.ca/>.

A large, white, stylized number '6' is positioned on the right side of the page, set against a background of horizontal purple stripes. A dark purple rectangular box is overlaid on the left side of the '6', containing the text '6. LOOKING AHEAD' in white, bold, sans-serif font. The bottom of the page features a solid teal horizontal bar.

6. LOOKING AHEAD

6. LOOKING AHEAD

There is a strong and growing interest in the role of community workers who provide trusted help for people with legal problems. This was evident in the strong participation and sharing of ideas through focus groups, interviews, and surveys during this project, and in the animated discussions at stakeholder meetings where we presented our early research findings. This bodes well for continuing to develop strategies and connections to strengthen the trusted intermediary role for the benefit of community clients with unmet legal needs.

The frontline community workers we heard from brought richness of experience and engagement, thoughtful perspectives, and a lot of insight. They understand and feel strongly the responsibility that comes with their clients' trust, and they have a strong sense of the importance of understanding and honouring their clients' experience. They are eager to participate in training and to have the benefit of other types of support for the trusted intermediary role. Many have had positive interactions with legal clinics and legal practitioners. They are highly motivated to help their clients, even on matters that are not directly within their area of expertise or job description.

Our research has highlighted both the value and the challenges associated with frontline community workers who serve as trusted intermediaries for people with legal problems. Community workers provide essential help to low-income and vulnerable people with legal problems. They can't give legal advice, but with support, they can do more in this role and do it even better. We hope that the touchstone for future action, directions for moving forward, and recommendations set out in Part 1 of this report, supported by the research findings in Part 2, will help to ensure that this vital component of access to justice will continue to evolve and flourish.

7. APPENDICES

Appendix A: Survey questions

Supporting community workers to help people with legal problems

Background Information

WELCOME. The purpose of this survey is to obtain input about the role of community workers in helping people with legal problems. The data will be used to inform a research project being conducted for the Law Foundation of Ontario. Participation in the survey is voluntary and confidential. For more information, [Click Here](#).

Some questions apply only to community workers. The survey will automatically direct you to questions that apply to you.

In this survey, “legal service provider” means a lawyer, paralegal or legal clinic community legal worker. “Non-legal community organization” means a non-profit organization whose mission does not include providing legal advice.

Supporting community workers to help people with legal problems

Survey

1. In your opinion, how important is it for non-legal community organizations to help their clients in the following ways?

	Not important	Slightly important	Moderately important	Important	Very important
Identify the legal issues a person is facing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide basic information about legal rights and procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refer people to legal service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help people to complete legal forms and documentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help people to take steps to resolve a legal problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accompany people to meetings with legal service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accompany people to tribunal or court hearings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Are you aware of training programs, practices or tools that work well to support community workers to help people with legal problems?

- Yes
 No

3. If you answered "Yes" to the above question, briefly describe the programs, practices or tools.

Supporting community workers to help people with legal problems

4. Are you a staff member or volunteer providing direct ("front-line") services in a non-legal community organization?

Yes

No

Supporting community workers to help people with legal problems

Note that this section only applies to people who have experience working as community workers.

If you are not a front-line community worker, please skip to the next section.

5. Have you ever provided the following types of help to clients of your organization?

	Yes	No
Identified the legal issues a person is facing	<input type="radio"/>	<input type="radio"/>
Provided basic information about legal rights and procedures	<input type="radio"/>	<input type="radio"/>
Referred people to legal service providers	<input type="radio"/>	<input type="radio"/>
Helped people to complete legal forms and documentation	<input type="radio"/>	<input type="radio"/>
Helped people to take steps to resolve a legal problem	<input type="radio"/>	<input type="radio"/>
Accompanied people to meetings with legal service providers	<input type="radio"/>	<input type="radio"/>
Accompanied people to tribunal or court hearings	<input type="radio"/>	<input type="radio"/>

6. How comfortable do you feel about providing the following types of help to clients of your organization?

	Not comfortable	Slightly comfortable	Moderately comfortable	Comfortable	Very comfortable
Identifying the legal issues a person is facing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing basic information about legal rights and procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Referring people to legal service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping people to complete legal forms and documentation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping people to take steps to resolve a legal problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accompanying people to meetings with legal service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accompanying people to tribunal or court hearings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Have you ever received training that included any of the following topics?

	Yes	No
Working with clients who have legal problems	<input type="radio"/>	<input type="radio"/>
Finding good legal information	<input type="radio"/>	<input type="radio"/>
Understanding the difference between legal advice and legal information	<input type="radio"/>	<input type="radio"/>
Legal systems and processes	<input type="radio"/>	<input type="radio"/>
Making legal referrals	<input type="radio"/>	<input type="radio"/>
Specific areas of the law	<input type="radio"/>	<input type="radio"/>

8. How helpful to your work was the training you received on any of the following topics?

	Not helpful	Slightly helpful	Moderately helpful	Helpful	Very helpful	No training taken
Working with clients who have legal problems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finding good legal information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding the difference between legal advice and legal information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal systems and processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Making legal referrals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Specific areas of the law	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. How would you like to learn about helping clients with legal problems? (check all that apply)

- In-person training
- Webinars and online courses
- In-house courses in your organization
- External conferences and events involving multiple organizations or sectors
- Self-study

Other (please specify)

Supporting community workers to help people with legal problems

10. Where are you located? (check one)

- A rural or remote community in Ontario
- An urban community in Ontario
- Another country or province (please specify)

11. Please check any of the descriptions below that apply to you.

- Staff in a non-legal community organization
- Volunteer in a non-legal community organization
- Lawyer
- Paralegal
- Legal clinic community legal worker
- Researcher or academic
- Person who has received legal help from a non-legal community organization
- None of the above

12. If you are part of a non-legal community organization, how many full-time staff are there?

- Less than 5
- 5-10
- 11-25
- 26-50
- More than 50
- Not part of a non-legal community organization

13. You can use the space below to provide additional comments or ideas about supporting community workers to help people with legal problems.

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14. Can one of our researchers contact you if we have questions?

Yes

No

15. If you answered "Yes" to the above question, please provide your name along with an email address, phone number, or both.

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Thank you!

Appendix B: Initiatives identified by research participants

Research participants identified many programs, practices, and tools that they find work well in supporting community workers to help people who have legal problems. They described some items in greater detail and others were mentioned more briefly. It was not possible within the limits and timeframe for our research to examine these items or to assess their effectiveness. We have highlighted some of them in the body of this report and list others here so that readers can explore items of interest. We acknowledge that the list is not exhaustive.

We especially want to acknowledge the contribution to this list by individuals who completed our survey. Forty per cent of survey respondents (159 people) indicated that they are aware of programs, practices, or tools that work well to support community workers to help people who have legal problems. Sixty per cent of survey respondents indicated that they are unaware of such programs, practices, or tools. Of the 159 people who were aware of programs, practices, and tools that work well, 150 took the time to describe them.

Examples highlighted in “snapshots” and case studies in this report

- Access Alliance Multicultural Health Centre
- Action ontarienne contre la violence faite aux femmes (AOcVF)
- Community Law School
- “Connecting Communities”
- “Connecting Ottawa”
- Family Court Support Worker Program/Luke’s Place; Training of Family Court Support Workers
- Hamilton Community Legal Clinic
- HIV & AIDS Legal Clinic Ontario (HALCO)
- Law for Life - Training of Trusted Intermediaries (UK)
- Legal health check-up, Halton Community Legal Clinic
- LGBTQ Parenting Network (Case study #3)
- Libraries
- Literacy sector
- Nishnawbe-Aski Legal Services Corporation
- Ontario Council of Agencies Serving Immigrants (OCASI)
- Ontario Federation of Indigenous Friendship Centres and Human Rights Legal Support Centre - Indigenous Human Rights Training (Case study # 2)
- Parkdale referral network
- Parks and Recreation Ontario
- Queen’s University Faculty of Engineering and Applied Science
- Pro Bono Ontario
- Rural Justice in Health Partnerships (Case study #1)
- St. Michael’s Hospital family health team
- Workers’ Action Centre
- Workers in violence against women shelters

Other examples mentioned by research participants

Clinic Interview partnership/A2J Technology

The use of A2J technology in the Clinic Interview Partnership helps legal clinics, community agencies, and clients deal with document assembly, intake, and referral. A [report](#) and [video](#) show how trusted intermediaries are engaged to serve hard-to-reach clients as part of this initiative.

Canadian Mental Health Association (CMHA) Ontario

Services include court support and individual and group settings to support clients through mental health issues.

Equay-wuk (Women's Group)

“Increasing our Knowledge, Building on our Strengths” is a project to train First Nations community service workers from 31 remote First Nations communities, including drug and alcohol issues workers, community health workers, and domestic violence workers. This training provides legal information related to human rights and violence against women.

Faith Project

The Rural Ontario Institute worked with “Places of Faith,” a project led by Faith in the Common Good.

Legal clinics' training and workshops

We heard many examples of legal clinics that offer training and workshops for community partners as part of their community outreach mandate.

Legal issues in health care plan

A standardized care plan template includes a section about legal issues affecting health and a way to identify areas where legal assistance may be beneficial.



The annual Agency Training put on by London, Ontario's Legal Aid Clinic (Neighbourhood Legal Services (London & Middlesex)) trains community workers about the basics of the law and recent updates in legal areas the clinic deals with. – Survey



The absolute best thing that has happened is our development of a relationship with the Community Legal Worker and having him work out of our main location on a regular basis. It is very easy for him to connect with people at the public library and it ensures that he is helping people in the community who need it. Often people don't even know where to begin so having him here makes that first step easier. – Survey

Native Court Workers

Native court workers provide assistance and support, through their band offices, to clients who are experiencing conflict with family or criminal law, homelessness programs, basic needs support groups, men’s and women’s healing circles, workshops, classes etc.

Ontario Healthy Community Coalition

The Ontario Health Community Coalition facilitates peer-exchanged presenters, not expert presenters. The presentations are designed for people in same milieu to share stories and experience. This was cited as a positive example of a community of practice and peer network.

Peel Project

The Peel Multicultural Council with Punjabi health services are doing training on various areas of the law, including immigration law.

Port Cares Project

Port Cares project dealt with cyber texting and bullying. It worked with 16- to 17-year-old youth in trouble for revealing photos that they didn’t know were against the law. The importance of having a youth advisory group was one of the lessons learned.

Project Sheila

This is a project to identify trusted people (“Sheilas”) in rural and remote communities to be trained on issue identification and on connection to legal resources like clinics.

Talk4Healing

Talk4Healing is a northern helpline for Aboriginal women, a resource for women who need advice.

Vibrant Communities Project

The Tamarack Institute’s Vibrant Communities project included government, business, and people experiencing poverty. This project was community-based and had a national community of practice.



The “Your Legal Rights” [CLEO] website is a great way for community workers to get basic information about legal problems and therefore be better able to identify legal issues that come up with their clients. – Survey



I work in a public library that subscribes to Law Depot to provide forms and documents. Staff receive no legal training, other than how to help patrons log on and search this database. – Survey

Websites: Legal information and tools

Consultation participants noted websites that provide legal forms, legal information, webinars, assistance with legal referrals, and other forms of support that trusted intermediaries and their clients find helpful.

- [All Women. One Family Law. \(FLEW\)](#)
- [Canadian Legal Information Institute \(CanLII\)](#)
- [City of Toronto](#)
- [Cliquez Justice](#)
- [Community Legal Education Ontario \(CLEO\)](#)
 - [Connecting Communities](#)
 - [PLE Learning Exchange](#)
 - [Steps to Justice](#)
 - [Your Legal Rights](#)
- [Court Prep](#)
- [Halton Information Providers](#)
- [RENT](#)
- [Law Depot](#)
- [Law Facts](#)
- [Legal Aid Ontario](#)
- [Luke's Place](#)
- [Ministry of the Attorney General](#)
- [My Support Calculator](#)
- [Ontario 211](#)
- [Ontario Association of Interval & Transition Houses \(OAITH\)](#)
- [Ontario Court Dates](#)
- [Ontario Court Forms](#)
- [Pro Bono Ontario](#)
- [Pro Bono Students Canada](#)
- [Settlement.org](#)

Other information, training and referral sources

- City for All Women resources
- Community legal clinics
- Family Law Information Centres
- Law Society referral service
- Newsletters from Neighbours, Friends and Family, The Learning Network, BBW, AOcVF, National Self-Represented Litigants Project and others
- Student legal aid service societies
- Webinars from CLEO, Legal Aid Ontario, METRAC, and others

Francophone services

Action ontarienne contre la violence faite aux femmes (AOcVF)

The AOcVF is a network of organizations offering services in French to women who have experienced domestic and family violence. Their training body (*Institut de formation en matière de violence faite aux femmes*) developed training for its network so that frontline workers can better help clients and see the difference between legal information and legal advice. They also developed a legal services centre (*Centre de services juridiques pour femmes francophones de l'Ontario*) that provides legal information and advice for Francophone women in Ontario.

Association des juristes d'expression française de l'Ontario (AJEFO)

AJEFO has spearheaded information campaigns and videos; CliquezJustice.ca; and the Ottawa Legal Information Centre.

Ottawa Legal Information Centre

Founded by the AJEFO, the Ottawa Legal Information Centre provides legal information and referral services to all residents of Ontario, including a legal information telephone line.

Centre francophone de Toronto

The organization has a legal clinic that offers legal representation and advice in French.

Femmes ontariennes et droit de la famille

This campaign and website, managed by *Action ontarienne contre la violence faite aux femmes*, provides family law information to women who have experienced violence. It is the partner of Family Law Education for Women (FLEW) administered by METRAC.

Montfort Renaissance

This Francophone organization has a program to support the courts in their efforts to redirect Francophones living with a mental health problem towards health services instead of detention centres.

The Connecting Project

The Law Foundation of Ontario established the Connecting Project to implement recommendations from *The Connecting Report* of 2008.⁷⁰ The Connecting Project is a suite of programs aimed at improving access to legal information and services for linguistic minorities and people who live in rural or remote areas. Two programs funded by the Law Foundation within the Connecting Project (“Connecting Communities” and “Connecting Region”) were cited as particularly relevant to trusted intermediaries.

“**Connecting Communities**,” coordinated by CLEO, improves the capacity of frontline workers in community organizations who help linguistic minorities or rural and remote residents to provide basic legal information and legal referrals. This is done through training frontline workers and partnership building between community and legal sector organizations.

“**Connecting Region**” enhances coordination at a regional level to ensure that clients receive continuous help as they address their legal issues. “Connecting Ottawa” has been funded under the “Connecting Region” program to test the benefits of a regional model to support people with legal problems. The program is currently undergoing a formal evaluation.

Other provinces

Community Partner Program (British Columbia)

The BC Legal Services Society runs a Community Partner Program to raise awareness of legal information and services available to help people in rural, remote, and Aboriginal communities. The program includes an annual training event in Vancouver.

Community Legal Intermediary Training (Manitoba)

The Community Legal Education Association in Winnipeg offers the Community Legal Intermediary Training and Law conference.

Intermediaries Training (Alberta)

The Alberta Law Foundation funded a project for the Centre for Public Legal Education Alberta in 2015 to train intermediaries about how to identify legal issues and make appropriate referrals.

Women’s Outreach Society (Alberta)

The Central Alberta Women’s Outreach Society in Red Deer uses a model in which a few workers in domestic violence provide social support, some court support, and information about the legal system and the violence prevention protocol.

Public Navigator Program (Nova Scotia)

The public navigator program is based on a New York model. It involves training community volunteers to assist people with small claims court and early intervention. In-person training helps to build networks.

Other countries

Open Society Institute (Budapest)

The Open Society Institute in Budapest looks at models of intervention for vulnerable people as part of “open justice” initiatives.

Regional Partnerships (New South Wales, Australia)

Twelve regional partnerships exist in remote and Aboriginal communities for clients who have legal and non-legal issues. Needs include domestic violence, tenancy, youth, disability, health services, and mental health services.

Health Justice Partnerships (New South Wales, Australia)

The Health Justice Partnerships in New South Wales provides legal services in a medical setting or at an Indigenous service.



It works best when Legal Aid works very closely with the medical centre and trains staff to be ‘problem noticers.’ We know low-income clients are likely to have particular problems involving addictions, tenancy, and credit card debt. If we conduct basic training about such issues with the medical practitioners, they can help people to become aware of the related legal issues.

– Interview (New South Wales)

Law Checkups (New South Wales, Australia)

“Law Checkups” involve a checklist to use while interviewing clients (e.g. “Do you have issues with debt?”) Both lawyers and community workers use the checklists.

Learn About the Law (New South Wales, Australia)

This program was for Aboriginal community workers to inform older Aboriginal people about wills, domestic violence, victims’ compensation, etc. Caseworkers received training and gained access to service providers they could connect with.

Legal Aid Program: Wills in a health clinic (New South Wales, Australia)

Pro bono lawyers do wills at a part-time medical clinic in a remote Indigenous community. The clinic has recognized the need for their patients to have wills to avoid family disputes that arise when there is no will. Dialogue between legal and medical providers was key to putting this program in place.

Women’s Legal Service (Victoria, Australia)

This organization offers interactive workshops for community workers to “provide practical tips on how to work with perpetrators of family violence to avoid collusion and to ensure accountability; and to focus on supporting survivors of family violence during the court process.”

Victoria Legal Aid: Settled and Safe Training (Victoria, Australia)

Victoria Legal Aid has developed settlement worker training and an information training program to help legal service providers and organizations engaging with newly emerging communities deliver legal information about legal rights and responsibilities around family relationships. The programs recognize that, to deliver “Settled and Safe” programs to communities, it is important that “educators are able to deliver legal education, as well as have an understanding of group facilitation, adult learning principles, and strength-based practice.”

Advicenow (UK)

Advicenow is a national digital information service designed for particularly vulnerable users. The program identifies gaps in the broader information and then fills them with multi-media content. Some of biggest gaps are in areas relevant to those who are most needy: income security, criminal proceedings, immigration and asylum issues, etc.

Citizens' Advice Bureau (UK)

The UK's Citizens Advice Bureau employs non-lawyer staff and volunteers to offer advice in common legal areas.

Law at the Extremes - Cambridge conference (UK)

A Cambridge conference is in the planning stages and likely to be held in the spring of 2018. The proposed theme is "Law at the Extremes, multi-disciplinary approaches to reaching marginalized and vulnerable communities and models of intervention."

Research Report on the Private Rental Sector (UK)

This report looks at the need for information on eviction in combination with training on skills to find resources. Preliminary findings indicate disconnect between on-the-ground workers and information providers at the top.



These questions are coming up across jurisdictions. It's extraordinary how similar the questions are. We should be engaged in a cross-border discussion driven by civil society agencies. It would be a great idea. – Interview, UK

Endnotes

- 1 Karen Cohl and George Thomson, *Connecting Across Language and Distance: Linguistic and Rural Access to Legal Information and Services* (Toronto: The Law Foundation of Ontario, 2008) (*The Connecting Report*). The report is available at [The Connecting Report](#), along with information about how The Law Foundation of Ontario implemented the recommendations set out in the report by developing a range of programs.
- 2 *Ibid.*, 44.
- 3 *Ibid.* The report refers to “trusted intermediaries” and recommends ways for the Law Foundation to make strategic investments to support the concept. For an example of the term used in French, see *Institut national de santé publique du Québec, Direction de la recherche, formation et développement, Animer un processus de transfert des connaissances: Bilan des connaissances et outils d’animation* (Québec: Gouvernement du Québec, 2009).
- 4 Sophie Clarke and Suzie Forell, “Pathways to justice: the role of non-legal services,” *Justice Issues Paper no. 1* (June 2007): 1. Available at [Pathways to Justice](#).
- 5 Karen R. Fisher, Robyn Edwards, Ryan Gleeson, Christiane Purcal, Tomasz Sitek, Brooke Dinning, Carmel Laragy, Lel D’Aegher, and Denise Thompson, “Effectiveness of individual funding approaches for disability support” (FaHCSIA Occasional Paper no. 29) (Canberra: Department of Families, Housing, Community Services and Indigenous Affairs, July 2010). Available at [Funding Approaches for Disability Support](#).
- 6 Meehan Rasch, “A new public interest appellate model: public counsel’s court-based self-help clinic and pro bono ‘triage’ for indigent pro se civil litigants on appeal,” *Journal of Appellate Practice & Process* 11 (2011). Available at [Public interest appellate model](#).
- 7 Cohl and Thomson, *The Connecting Report*, 2008 (see note 1), 44, citing Gayla Reid and John Malcolmson, *Voices from the Field: Needs Mapping Self-help Services in Rural and Remote Communities—Final Report* (Vancouver: Supreme Court Self-help Information Centre, 2008), 94. Available at [Voices from the Field](#).
- 8 Karen Cohl, “Access to Justice Themes—‘Quotable Quotes’: Background Paper for The Law Society of Ontario’s Access to Justice Symposium *Creating a Climate for Change*, October 29, 2013” (Toronto: Law Society of Upper Canada, 2013), 5. Available at [Quotable Quotes](#).
- 9 See Appendix A for the survey questions.
- 10 “Connecting Ottawa” and “Connecting Communities” were launched as part of a suite of programming developed by and with The Law Foundation of Ontario to implement recommendations in Cohl and Thomson, *The Connecting Report*, 2008 (see note 1).
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