



LEGAL AID ONTARIO
AIDE JURIDIQUE ONTARIO

375 University Avenue, Suite 404, Toronto ON M5G 2G1
375, avenue University bureau 404, Toronto ON M5G 2G1

Toll free / Sans frais : 1-800-668-8258 ex

Phone / Téléphone :

Fax / Télécopieur :

Email / Courriel :

www.legalaid.on.ca

Jeffrey Stutz
11 Aldburn Road
Toronto, Ontario
M6C 2K4

Lucille Narun,
1 Deer Park Crescent
Toronto, Ontario
M4V 3C4

March 17, 2008

Dear Jeffrey and Lucille:

This is to confirm the offer from Legal Aid Ontario (LAO) to retain you as research consultants. This letter sets out the terms and conditions of your Agreement with LAO as well as some general information and expectations relevant to your work for LAO. Appendices A and B, attached, are part of this Agreement.

This contract takes effect on the date of signature and will terminate on the date of the delivery of your final report.

You will take direction from and report to me in my capacity as Director, Strategic Research, Legal Aid Ontario.

General Information and Expectations

- LAO is undertaking a broad program of strategic research as part of its long-term planning process. Each area identified on LAO's strategic research agenda will be the subject of a research project/paper and some form of consultation(s);
- The general mandate of LAO's strategic research program is to undertake strategic research promoting access to justice by low-income Ontarians and publicly funded legal services in Ontario;
- LAO and each researcher will establish and agree to terms of reference for each major research project/paper. Researchers will be asked to participate in some form of consultation or roundtable to facilitate discussion within LAO and its stakeholders on their research topic;
- Your research project/paper must be of very high quality. The factual, legal and public policy analysis must be able to withstand rigorous scrutiny;
- The intended audience and readership for the projects/papers are intelligent non-specialists. The public education component of the projects/papers is extremely important;

- Generally speaking, research projects/papers should use a comparative and case-based methodologies, provide concrete examples and ideas, and identify theoretical models and frameworks. The projects/papers should help identify and compare the range of policy or program options and perspectives within the subject area. It is vital that the projects/papers reflect the diversity of opinion that exists within a subject area. Projects/papers should also include bibliographies or other references;
- The research papers/projects may be posted on LAO's or otherwise distributed to promote discussion and debate;
- Neither the research projects/papers nor the accompanying consultations will be expected to provide final answers. Our goal is to provoke innovative, creative and practical ideas that will assist LAO fulfil its strategic research mandate to promote access to justice by low-income Ontarians and publicly funded legal services in Ontario.

Researcher/Author's Role and Responsibilities

You undertake to:

- Prepare a research project/paper on "Technology and Legal Aid Services" in accordance with the outline set out in Appendix A;
- Organize, with the assistance of LAO, a one-half day conference on this topic;
- Develop, with the assistance of LAO, a budget, agenda and project plan for the conference;
- Develop a draft table of contents for the paper, in consultation with LAO;
- Write the paper in plain language and ensure that the presentation, and organization of the paper is accessible to a lay readership;
- Consult with groups or individuals as LAO may request during the preparation of the project/paper;
 - Provide LAO with periodic updates on request;
 - Provide LAO with a written outline of potential travel and disbursements that you are likely to incur during your research (if any);
 - Take part in a roundtable discussion and/or a public forum on the subject of your draft paper, if requested by LAO;
 - Consider and incorporate where appropriate comments from LAO or others into the final paper;
 - Make a brief presentation of the paper to LAO staff, Board, or Strategic Research Advisory Committee if requested by LAO;

- Comply with all deadlines set out in this Agreement; and
- Comply with the confidentiality undertaking (Appendix B) and publication limitation set out in the Agreement.

Support from LAO

In my capacity as Director, Strategic Research, I will:

- Provide timely advice and support;
- Be available for consultation throughout the course of this work;
- Provide relevant LAO resources, including background documents, reports or any other material LAO has in its possession;
- Organize consultations or roundtables in consultation with you;
- Prepare a summary report from any roundtable or public forum about your paper;
- Engage a reviewer, if deemed necessary by LAO staff, to read and comment on your project/paper;
- Circulate the draft and final paper as appropriate; and
- Facilitate input from LAO and from an advisory committee that legal aid may establish.

Deadlines

- Conference: May 30th, 2008
- Draft table of contents for the paper: June 30th, 2008
- Draft paper: July 31st, 2008
- Final paper: August 29th, 2008

Payment

- Your combined fee will be \$25,000 inclusive of any and all taxes. Please note that LAO is exempt from paying GST). This amount includes the cost of all revisions required. This amount also includes the cost of your sub-contractor(s) or other assistants who may work on the paper. Any remuneration payable to them is included in this amount. This amount does not include the cost of the conference.
- 20 percent of your fee is payable on execution of this contract, 40 percent upon on the

completion of the conference, and 40 percent on LAO acceptance of a final paper with revisions. You will coordinate your invoices so as to equal these amounts.

Travel and Disbursements

- LAO will work with you to develop a travel and disbursement plan and budget for your project. This written plan and budget must be approved by me on behalf of LAO prior to any expenses being incurred; and
- LAO will reimburse reasonable travel and disbursement expenses that are consistent with the plan and budget and in accordance with LAO's guidelines. LAO will provide you with a summary of these guidelines and the necessary expense claim form if travel is deemed appropriate.

Fee Payments and Expense Reimbursements

Fee payments and reimbursement of expenses will be made on the basis of your invoices to LAO and your completed expense claim forms. Invoices and claim forms should be submitted to me.

Confidentially Undertaking

On acceptance of this Agreement, you will treat as confidential and will not disclose or give to any person, during or after this assignment, any information or document that is of a character confidential to the business of Legal Aid Ontario to which you may become privy as a result of the performance of the above-mentioned services. You will sign and return the Confidentiality Undertaking, attached as Appendix B.

Publication Rights

All rights to any papers/reports or other material prepared by or for you in the performance of your services, pursuant to this Agreement shall be the property of Legal Aid Ontario. Legal Aid Ontario has the sole discretion whether to release all or part of your research project/report. You may, however, apply to LAO to grant you a royalty-free license to re-publish your final project/paper at any time following acceptance of the final report by Legal Aid Ontario.

Termination of Agreement

This Agreement may be cancelled by either party upon giving seven days' written notice of such intention. If cancellation is by LAO, an invoice for work done and delivered up to the point of cancellation, less any earlier payments on account, will be honoured.

This Agreement takes effect on signature and will terminate on the date of the delivery of the final paper.

Please sign this letter and Appendix B and return one original to me. I look forward to your

contribution to the work of Legal Aid Ontario.

Yours very truly,

Authorized Signature or Initials

Aneurin Thomas
Director, Strategic Research

The undersigned hereby agree to the matters documented above.

Authorized Signature or Initials

Jeffrey Stutz

March 18, 2008

Date

Authorized Signature or Initials

Lucille Narun

March 18, 2008

Date

**APPENDIX A
DRAFT OUTLINE OF PROJECT AND PAPER**

Technology is often offered as a solution to a wide range of legal aid and access to justice issues. Many jurisdictions now have very extensive experience using innovative technology to assist litigants to represent themselves, improve access to legal aid services in rural and remote locations, and improve access to legal aid information and services generally. Many jurisdictions also have experience with "smart" websites, kiosks, automated translation services, automated document assembly, and other innovative technologies designed to both promote access to justice and reduce legal aid expenditures.

This project would provide a preliminary overview of the issues and options related to the use of technology to promote access to justice and improve the efficiency of legal aid services. More specifically, this project would study:

- Benefits and limitations of alternative technologies from a client service, access to justice, administration, and financial perspective
- Description of general service delivery options and issues
- Potential scope of LAO services, based on experience in other jurisdictions
- How services would impact specific groups in LAO's clientele
- Potential cost factors and ongoing operational issues.

The project would identify a range of potential technologies from which LAO management could select a smaller set for further work. In-depth feasibility assessment and costing of these alternatives could be a second stage of work. Community clinics and services for lawyers are not included in the scope.

Products

The project would provide two products:

1. A conference for LAO management and staff

The conference would provide attendees with the results of a survey of new technologies that are relevant to improving LAO's client services and demonstrations of selected technologies to improve services. Where feasible, attendees would experience hands-on use of services, such as through Internet links to services in other jurisdictions. Presenters could be invited to speak about the technology-based services they are providing, in person and/or by video-conferencing. Attendees would take away information kits on the services profiled. The conference would be targeted to about 50 LAO managers and staff members, LAO Board members, and others LAO may invite.

Timing: May 2008

Duration: Half day.

Location: Toronto downtown, near LAO's head office.

Cost: Budget to be determined with LAO.

2. Report on alternative technologies for LAO client services

Following the conference, a report will be prepared on technologies in use and best practices identified in other jurisdictions that could be adapted to strengthen legal aid

services to clients in Ontario. The focus for other jurisdictions will mainly be on Canadian provinces and English-speaking countries. For each technology, the report will address the aspects of service delivery, impact on LAO's clientele, access to justice, administration and cost factors. The report will assess technologies with attention to LAO's service improvement goals and priorities, and will consider the relationship to existing technologies that support LAO services, such as LAO's website. The report will analyze issues raised by presenters at the conference and in discussions with LAO staff and others. The report will include a bibliography of sources used.

Timing: August 2008

**APPENDIX B
CONFIDENTIALITY UNDERTAKING**

I undertake to Legal Aid Ontario to keep confidential all Legal Aid Ontario documents or information that are not in the public domain. I will not use these documents or information for any purpose other than my work for Legal Aid Ontario. I understand that confidential information includes the discussions at any Legal Aid Ontario meetings, with Legal Aid Ontario staff, board members or Strategic Research Advisory Committee members.

I understand that I can request Legal Aid Ontario to release me in writing from this undertaking with respect to any document or information. I agree that Legal Aid Ontario has the sole discretion whether to release me from this confidentiality undertaking with respect to a document or information.

With respect to those documents or information that remain subject to this undertaking at the end of this contract, I will either destroy those documents or information, and provide a certificate of destruction to Legal Aid Ontario, or I will return those documents or information to Legal Aid Ontario.

Authorized Signature or Initials

Witness

March 18, 2008
Date

Mw. 18/08
Date

I undertake to Legal Aid Ontario to keep confidential all Legal Aid Ontario documents or information that are not in the public domain. I will not use these documents or information for any purpose other than my work for Legal Aid Ontario. I understand that confidential information includes the discussions at any Legal Aid Ontario meetings, with Legal Aid Ontario staff, board members or Strategic Research Advisory Committee members.

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Authorized Signature or Initials

Authorized Signature or Initials

Lucille Narun

March 18, 2008
Date

Mw. 18/08
Date

Fiscal Year	Accting Period	Jrnl Date	AP Voucher Number or GL Journal ID	Invoice #	Vendor ID	Vendor Name	Account	Department	Project	Product	Monetary Amount	Journal Line Description	Fund	Department Description
2007	12	2008-03-31	00101860	2008/03	0000000556	Stutz, Jeffrey	65400	846000-	Mar 31, 2008		3,000.00	Expense Distribution	846000	Strategic Research
2008	3	2008-06-30	00108209	2008/06	0000000556	Stutz, Jeffrey	65400	846000	July 2, 2008		6,000.00	Expense Distribution	846000	Strategic Research
2008	6	2008-09-22	00113037	2008/08	0000000556	Stutz, Jeffrey	65400	846000	Sept 22, 2008		7,000.00	Expense Distribution	846000	Strategic Research
											16,000.00			

INVOICE NUMBER: 2008/03
DATE: March 18th, 2008

JEFFREY STUTZ

11 Aldburn Road
Toronto, Ontario
M6C 2K4

Received
MAR 24 2008
LAO Finance Dept.

Invoice to:

Legal Aid Ontario
375 University Avenue, Suite 404
Toronto, Ontario
M5G 2G1

Attention: Aneurin Thomas
Director, Strategic Research

New Technologies and Client Service Project
Execution of contract (20%)

TOTAL FEES **\$3,000.00**

TOTAL AMOUNT DUE **\$3,000.00**

GST exempt

LEGAL AID ONTARIO									
Account Number		Invoice Number				Project			
6	5410	1	4600	0	0				

Client ID Number _____
Goods Received / Services Rendered _____

Authorized Signature or Initials

Director, Strategic Research
Mar. 27/08
101860

INVOICE NUMBER: 2008/06
DATE: June 12, 2008

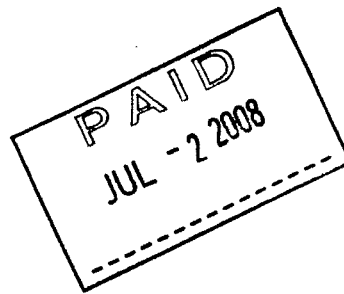
JEFFREY STUTZ

11 Aldburn Road
Toronto, Ontario
M6C 2K4

Invoice to:

Legal Aid Ontario
375 University Avenue, Suite 404
Toronto, Ontario
M5G 2G1

Attention: Aneurin Thomas
Director, Strategic Research



New Technologies and Client Service Project
Completion of conference (40%)

TOTAL FEES

\$6,000.00

TOTAL AMOUNT DUE

#108209

\$6,000.00

GST exempt

LEGAL AID ONTARIO			
Account Number	Invoice	Project	
1 65400	0460	001	
2			
3			

Match to PO Number

Goods Received/Services Rendered

Authorized Signature or Initials

Signature of Authorized Official

Aneurin Thomas
June 16/08

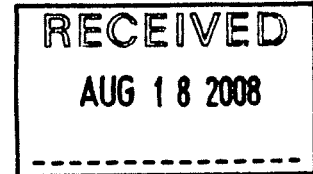
INVOICE NUMBER: 2008/08
DATE: August 12, 2008

JEFFREY STUTZ

11 Aldburn Road
Toronto, Ontario
M6C 2K4

Invoice to:

Legal Aid Ontario
375 University Avenue, Suite 404
Toronto, Ontario
M5G 2G1



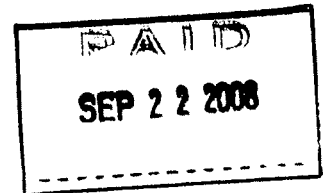
Attention: Aneurin Thomas
Director, Strategic Research

New Technologies and Client Service Project
Completion of report (40%)

TOTAL FEES **\$7,000.00**

TOTAL AMOUNT DUE **\$7,000.00**

GST exempt



LEGAL AID ONTARIO		
Account Number	Cost Centre	Project
1 61541010	2141610	0101
2		
3		

Match to PO Number _____
Goods Received/Services Rendered _____

Authorized Signature or Initials

Signature of Authorized Official _____
Title _____

Jeffrey Stutz
Title _____

Aug 19/08

113037



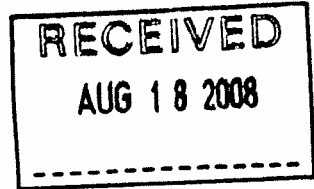
LEGAL AID ONTARIO
AIDE JURIDIQUE ONTARIO

375 University Avenue, Suite 404, Toronto ON M5G 2G1
375, avenue University, bureau 404, Toronto ON M5G 2G1

Toll free / Sans frais :
Phone / Téléphone :
Fax / Télécopieur :
Email / Courriel :
www.legalaid.on.ca

MEMORANDUM / NOTE

TO / DEST. : Accounts Payable
FROM / EXP. : Nye Thomas
Director, Strategic Research
DATE : August 19, 2008
SUBJECT / OBJET : Expense claims



Attached please find two invoices for consultants I have hired.

Thanks

Nye