



legal hotline

A publication of the Technical Support for Legal Hotlines Project. Supported by the AARP Foundation and the U.S. Administration on Aging. **QUARTERLY**

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LHQ Gets A New Look

Our sedate blue *Legal Hotline Quarterly* lettering is gone but *LHQ* continues to be your newsletter dedicated legal hotline issues. AARP Creative Services developed our new masthead to match the AARP color palette and design. Inside these pages you will continue to find articles to help you plan, manage, and evaluate your legal hotline program.

If you have any articles, updates on your operation, reports, surveys, or studies you would like to submit for publication, please contact the Technical Support for Legal Hotlines Project. We are also looking for your documents on planning, work-flow, evaluation, *FAQs*, screening questions, manuals, and reports to post at the Legal Hotlines and Poverty Law websites.

If you have an idea for a topic or would like to submit a *From the Frontline* column, we would be thrilled to hear from you.

The AARP Foundation is AARP's affiliated charity. Foundation programs provide security, protection and empowerment for older persons in need. Low-income older workers receive the job training and placement they need to re-join the workforce. Free tax preparation is provided for low- and moderate-income individuals, with special attention to those 60 and older. The Foundation's litigation staff protects the legal rights of older Americans in critical health, long-term care, consumer and employment situations. Additional programs provide information, education and services to ensure that people over 50 lead lives of independence, dignity and purpose. Foundation programs are funded by grants, tax-deductible contributions and AARP.

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UPDATE ON Northwest Justice Project CLEAR*Sr

*(Excerpted from CLEAR*Sr News, March 2004)*



Northwest Justice Project in Seattle was one of four programs in the country chosen to receive a three year grant from the Administration on Aging in the Enhancement to Access to Legal Services category. The grant will be used to continue and expand the CLEAR*Sr program, the portion of the Coordinated Legal Advice and Referral system for people 60 year of age and older.

With the AoA grant, NJP will pilot an “enhanced” legal hotline that offers broad telephonic access to legal assistance and increases by 20% the number of senior callers who obtain favorable resolution of legal problems relating to housing, income and benefits preservation, safety, and consumer protection. In the project NJP will explore the best ways to act on the findings of two hotline outcomes studies. The studies concluded that contacting clients to confirm that previous advice was understood and actively followed, and providing brief services for those clients most likely to have difficulty proceeding on their own, will increase the number of favorable outcomes when full legal representation is not available. NJP will work with local agencies serving seniors to make sure that our services are targeting the most critical client needs and that clients with those needs find their way to CLEAR*Sr. The project will be staffed with 1.25 FTE attorneys and a part-time project coordinator.

What Can Callers to CLEAR*Sr Currently Expect?

Currently, all calls to CLEAR and CLEAR*Sr are answered by a lawyer or paralegal. Calls are taken in the order they are received. Unfortunately, the demand for services exceeds the resources available to add advocates and lines so callers may get a busy signal or a message stating that all circuits are busy. Once a call has been answered by the system, the caller may stay on the line until the call is answered by a lawyer or paralegal. Wait times range from 10 minutes to over an hour, depending on call volumes and the number of advocates answering calls on any day. Each day one CLEAR*Sr advocate answers calls on the CLEAR*Sr line. Fortunately, CLEAR*Sr is integrated with NJP’s CLEAR program for low-income people, which means that low-income seniors’ calls can be answered by a staff person from CLEAR*Sr or from CLEAR, reducing wait times. While waiting for a call to be answered, callers hear music, periodic announcements of their place in line and other useful information. In the near future callers will have the option of listening to recorded legal information while waiting.

CLEAR*Sr Consumer Project is Completed

CLEAR*Sr has finished its three-year project that focused on the consumer law needs of senior citizens. The project was funded by a grant from the Administration on Aging that ran from October 2000 through September 2003. The goal of the project was to develop ways to help seniors avoid consumer legal problems, identify potential legal problems before they became emergent and to address problems in need of resolution. The project had four components: helping seniors who called our CLEAR*Sr telephone “hotline” with their legal problems; creating and disseminating informational brochures; training seniors and people who work with them to spot issues that indicate a possible consumer legal problem; and training lawyers to handle more consumer law issues.

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Examples of CLEAR*Sr's work over the past three years:

★A bank froze the account of a senior to satisfy a debt to the bank. The account contained only Social Security benefits. A CLEAR*Sr attorney contacted the bank and cited the federal statute exempting Social Security funds from garnishment as well as a recent court decision. The bank restored the funds.

★A senior contacted CLEAR*Sr after having faulty denture work done. The client complained to the Department of Licensing and the Board of Health and the Board brought informal charges against the denture provider. The denture provider sold the remaining debt on the client's account to a collection agency that was harassing the client. The CLEAR*Sr advocate held the collection agency at bay pending the outcome of the administrative proceedings and then negotiated for inclusion of forgiveness of the remaining debt in the final order of the Board of Health. The debt was forgiven, and the collection agency harassment ended.

Integration with Aging Network

CLEAR*Sr hopes to collaborate with senior service providers to make sure that it reach the seniors who need the most help – those who have problems relating to housing, income and benefits preservation, health care, and personal safety that may be amenable to a legal resolution. CLEAR*Sr is forming a Community Advisory Group to help it reach seniors and to make sure it has up-to-date information about the most compelling problems seniors are facing. The goal is to form a geographically diverse group that serves seniors of varied demographics. If your agency is interested in joining the Community Advisory Group, please contact:

Ellie Lende at elliel@nwjustice.org/888-201-1012.

Announcing: Fifth Annual National Aging and Law Conference 2004

**October 20 - 23, 2004
Hilton Crystal City, Arlington,
VA**

We are proud to announce the Fifth Annual National Aging and Law Conference: "Advocacy in Action – Still Responding to Challenges", sponsored by the AARP Foundation with the ABA Commission on Law and Aging, the National Senior Citizens Law Center, The Center for Social Gerontology, the Center for Medicare Advocacy, the National Academy of Elder Law Attorneys, the National Consumer Law Center, and the National Association of State Units on Aging.

Some of the highlights of this year's conference include:

- The Pre-Conference Day on October 20 will include sessions on the "Nuts and Bolts" of several aging and law topics
- Advanced Substantive Topics and Discussion: 50 + workshops and roundtable focusing on cross-cutting issues in the law
- Opportunity for Networking with legal services and aging advocates across the country
- NALC and the National Citizens' Coalition for Nursing Home Reform will once again join together for a "Bridge Day" on Legal Issues in Long Term Care.

Registration Form:

<http://www.aarp.org/ntp>

VOICE SOLUTIONS*

(Reprinted from *Star Watch*, Jan/Feb 2004
with permission of Western New York Law Center)

VoIP (voice over IP - that is, voice delivered using the Internet Protocol) is a term used to describe a set of facilities for delivering voice information using the Internet. The term "VoIP" is derived from the VoIP Forum, an effort by major equipment providers, including Cisco, VocalTec, 3Com and Netspeak, to promote the use of a specific standard for sending voice (audio) and video using IP on the public Internet and/or within an intranet. From a cost standpoint, VoIP avoids the tolls charged by ordinary telephone service and saves organizations a great deal of money.



Beyond the cost savings, VoIP has another advantage. Since VoIP marries an organization's telephone network with its data network, a whole new set of capabilities emerge that would be physically impossible or cost prohibitive without this convergence of two seemingly disparate technologies.

Cost savings

VoIP cost savings occur in 3 major areas:

- Simplified network structure.
- Reductions in the cost of telephone service moves, adds and changes (MACs).
- Lower costs for the combined Internet and telephone bandwidth.

Instead of wiring each office with a connection to the telephone system and another connection to the data network, only a data network connection is needed. While the cost savings for this is relatively small, the resulting simplification of the networks also reduces ongoing maintenance costs.

As the size of an organization increases, the number of moves, adds and changes of telephone service increase dramatically. In large organizations, there may be as many as 7 telephone service MACs for every 8 employees — per year. According to one study, it costs between \$35 and \$300 per MAC with

a traditional telephone system (if work is done by in-house staff, the cost is \$35-\$90; if done by outside contractors, the cost is \$55-\$300). In an office where all staff has IP telephones, the cost of the most common service change, staff office changes, is almost zero. When an employee changes offices, the telephone is simply unplugged from the wall jack and carried to the new office and plugged back in. There is no need to have highly-paid technicians reprogramming the telephone system with the new extension numbers and office locations.

When separate, the bandwidth of the telephone network and the data network must each have sufficient capacity to carry their separate loads. In studies of telephone usage, many times it is the case that a significant amount of the telephone network capacity is unused (and unneeded) for long periods in the business day.

What can VoIP do?

Plenty. Because these new systems integrate the voice and data worlds, you get the best of both.

Ease of control. To control personal smart phone features, users call up the user interface program on their computer — whether they are in the office or connected to the Internet from a remote location. It is much easier than using the unwieldy menu system on the telephone.

Nice bells and whistles to have. Most VoIPs offer the following services as part of the basic package price: Caller ID with name, Caller ID block, 3-way calling, and call return (*69).

Call Forwarding. Most smart phone systems allow users to forward calls to any number or series of numbers in the US or Canada. Along with the forwarding of the call, users can control how long call forwarding will ring a given number before moving on to the next number. If the call is not picked up, users control which voicemail box should receive the unanswered call.

Call Waiting. If you are already on the phone and another call for you is received, these new systems

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can be set up to ring another telephone line of your choice. The line that is rung could be another line connected to your telephone, or it could be another person in a completely different geographic location. You can control the order in which the incoming call is routed to other locations.

Simultaneous ringing. If you really want to be available, you can set up the smart phone system to not only ring the phone on your desk, but also simultaneously ring another telephone anywhere in the US or Canada. It is similar to call forwarding, except both ring at the same time.

Call transfer. After you answer a call, you may have your call transferred to your cell phone, to another land line or to any US or Canadian phone number of your choosing. Your calls are transferred immediately.

Voicemail to email. Users do not have to use their telephones to check their voicemail. Most smart phones can be configured to attach voicemails to email messages that can be sent to the user. When users check their email, they automatically could get their voicemails, as well. Instead of receiving a message containing text, the attached sound file (containing the voicemail) is played on the user's computer. Most smart phone systems allow the end-user to control this feature.

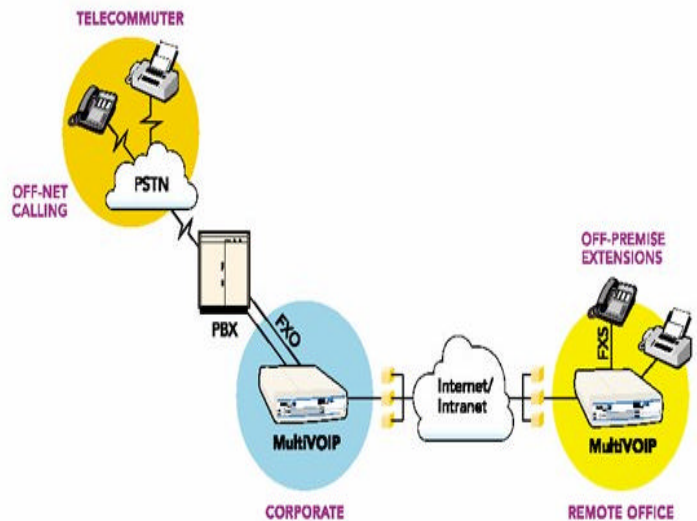
Virtual phone numbers. For a small monthly charge of \$5-\$10 each, VoIP users can have local telephone numbers in other cities, area codes and/or states. This allows people who live in other areas to make local toll-free calls to your organization. Depending on circumstances, this might be a lower-cost alternative to an 800 series telephone number.

Backup. In the event that the Internet connection to the telephone system fails, many systems will automatically transfer calls to a predefined set of telephone numbers. If the telephone service at the main office fails, calls could be re-routed to the receptionist at a branch office, or staff could have calls re-routed to their personal cell phones.

Most VoIP vendors do not charge extra for these services.

How does VoIP work?

Most people have a vague idea of how a traditional telephone system works, but little of that information is required to initiate a telephone call. It is not necessary to understand all of the technology that routes a user's voice from their handset to the person that they are calling. The same applies to the use of a VoIP telephone. The telephone equipment on the user's desk looks almost like any other telephone. The person called does not need any special equipment to receive calls coming from VoIP telephone systems. The big difference is how it is physically connected to the world outside of the office. With a traditional telephone system, each telephone line consists of a pair of copper wires that can be traced all the way from the user's office to the telephone switching station. In a VoIP system, instead of phone lines exiting the user's premises as copper wire, each phone line is connected to a device called an Analog Telephone Adaptor (ATA). The ATAs are connected to the user's data network which provides the pathway to/from the Internet.



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How much does it cost?

There are many different pricing schemes, depending on the complexity of the equipment, services and level of support to be provided by the VoIP vendor. There are a range of products and services available that could meet the needs of organizations ranging in size from one-person operations all the way up to multinational corporations.

The first step in the process of acquiring and installing a VoIP system involves an in-depth analysis of the capabilities, usage patterns, and costs associated with the current telephone system. It is impossible to make choices about new equipment and services without fully understanding what is needed versus what is merely desired. It is also vital to know what the current telephone costs are.

Regardless of the size and complexity of an organization's needs for telephone service, there is one certainty: VoIP depends on a state-of-the-art switched network within the organization. Many experts recommend that switching to VoIP during an overhaul of an existing data network, since its cost savings can help offset the expense of new gear for data applications only.

Should I switch to VoIP right now?

VoIP can be a cost-effective way to improve an organization's telephone system. With more and more VoIP vendors entering the marketplace, users are able to demand quality service and profit margins are being squeezed down to reasonable levels. It can only get better. If an organization is currently looking to upgrade its telephone or data network infrastructure, now is the time to look at VoIP. If the cost and performance of the current telephone and data network are satisfactory, it might be best to wait.

**The Technical Support for Legal Hotlines Project does not recommend any particular product or technology but presents information in keeping with its mission to inform legal hotlines about available products, services and resources.*

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The National Technology Assistance Project

can help you navigate the process of selecting a phone system.

NTAP held a telephone/WebEx Hotline Roundtable training in May, 2004 entitled:

Selecting A Phone System for Your Hotline (or Centralized Intake Unit) -- a Guide for Managers and Directors

If you are planning to implement or upgrade your phone system, the materials from the training are a perfect place to start the process.

You can view materials from the Roundtable at:

<http://www.lstech.org/ntap/trainings/modules/HR103>

There you will find lists of features to consider for a phone system such as:

- a. Integrated Email/Chat
- b. Recorded scripts of legal info (Listen to recorded scripts while on hold)
- c. Fax-back
- d. Split-based routing
- e. Skill-based routing
- f. Place in queue/ETA
- g. Callbacks: ASAP
- h. Callbacks: Scheduled
- i. Abandoned Call Return
- j. Virtual Wallboards
- k. Silent Monitoring
- l. Live Recording
- m. Reporting
- n. Remote Agent log-in - Internal
- o. Remote Agent log-in - External

The NTAP resources also contain a matrix of bidders, price comparisons, and sample RFPS for phone systems prepared by Bay Area Legal Aid in Oakland, Ca.

Student Legal Aid Hotline: A Unique Program with CARPLS, Chicago-Kent College of Law and BTI Communications Group.

CARPLS, Chicago-Kent College of Law, and BTI Communications Group joined forces this Spring to launch a new Student Legal Aid Hotline. Chicago-Kent College of Law students will get valuable clinical experience while assisting low-income callers in need of legal help. The Project is a partnership with Coordinated Advice and Referral Program for Legal Services (CARPLS), Chicago-Kent, and BTI Communications Group.

As Cook County's non-profit legal assistance hotline, Coordinated Advice and Referral Program for Legal Services (CARPLS) helps lower income individuals address their legal needs in a timely and cost-effective manner. Volunteer and staff attorneys accomplish this mission by providing legal advice and information, brief services to prevent and minimize litigation, prompt referrals to appropriate legal, government and social service programs, and educational and instructional materials to enable clients to address their own legal needs. (*See issue 14 LHQ Spring 2000 for detailed article on CARPLS*)

By providing these services, CARPLS aims to increase access to justice, to streamline the legal services delivery system, to expand problem-solving options and to increase available legal resources for our clients by identifying gaps in services and advocating to fill those gaps.

The hotline will serve as a clinical program to the evening students who are often left out of most of the day-centered clinical programs. Lectures will help to train the students on how to conduct the phone interviews relating to landlord/tenant law cases and family law cases.

"CARPLS and Chicago-Kent are very excited about this program," says Allen Schwartz, executive director for CARPLS. "Chicago-Kent was looking for another clinical class for its students and CARPLS needed help meeting the growing volume of calls to our hotline. CARRPLS and Chicago-Kent share a common philosophy about the use of technology in the delivery of legal services and the new clinic relies heavily on emerging technologies, so it's a good fit all the way around."

BTI is providing the technology for CARPLS to implement remote intake at the student hotline clinic. CARPLS has been a BTI client since 2002. BTI Communications Group Ltd., an exclusive business partner with Inter-Tel, Inc., offers a package called ProfitSolutions™ that integrates both phone and data needs and includes a strategic plan to fit both the client's applications and financial needs.

BTI has installed the Inter-Tel Axxess phone system, and is assisting with telephony solutions for six telephone stations and Internet outlets to be used by one on-site supervisor and five students. CARPLS receives as many as 10,000 to 14,000 calls per



Chicago-Kent College of Law Students
Staff the CARPLS Student Legal Aid Hotline

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month per hotline. The partnership between Chicago-Kent and BTI will help CARPLS tap into volunteer resources that haven't been available previously.

Additionally, BTI recently donated IP phones for use with a separate pilot project enabling CARPLS staff attorneys to work from home via Voice over Internet Protocol and computer telephony integration.

"Attorneys can be anywhere and can still access our Intake Software, which has all our resources including primary sources such as statutes and annotations to statutes all there via the Internet," Allen says. "People can work from home or courthouses. We've gone beyond working within our office space. With these IP phones, basically, for us it is 'Have Internet connection, will travel.'"

CARPLS hopes to implement the same VoIP and CTI technology with the Student Legal Aid Hotline in the future, but for now, IP technology and the related applications and technology can be costly. Allen hopes to make greater use of this emerging technology in the future as its costs decrease. In the meantime, CARPLS is very excited to be partnering with BTI on long-term technology solutions that will allow it to expand to meet the growing demand for services.

For info about BTI:
www.btigroup.com or
www.profitsolutionsgroup.net.

For info about CARPLS
www.carpls.org
 aschwartz@carpls.org

Profile of Legal Hotlines

The searchable Directory of Legal Hotlines at www.legalhotlines.org lists 145 programs identifying themselves as legal hotlines. You do not have to call your program a hotline to be included, but you do have to offer fact-specific legal advice on the phone at the time of the initial call or via a call back. Programs doing telephone eligibility and intake screening only were not included, even if they did call themselves "hotlines".

Here are some facts about the hotlines-

(Not everyone selected an answer for every category and some categories allowed more than one choice, hence the profiles do not add up to the total)

Service Area

Local	40 programs
National	3
Regional (more than a greater city area, less than an entire state)	49
Statewide	53

Hotline Model Type

Single Office Intake	44
Multi Office Intake	63
Multi Program Intake	21
Standalone	31

Funding Sources

LSC	84
AoA Title IIIB	28
AoA Title IV	12
ILOTA	59
State Funds	43
Other	69

Case Management Software in Use

Customized	32
Kemps (any version)	60
Legal Files	4
Practice Manager	5
TIME (WNYLC)	11
PIKA	9

Outcome Measurement: Assessing Clients' Perspectives of the Impact of Legal Aid Services in Their Lives

*By Gary Dart, Esq. and Denise Caudill, DrPH, presented at 2004 Equal Justice Conference**



Outcome Measurement

“The regular, systematic tracking of the extent to which program participants experience the benefits or changes intended.”

United Way of America, 2000

Since the early 1990s the **United Way of America** has taken a lead role in outcome measurement in the nonprofit sector in the USA. The **Tulsa Area United Way** provided Capacity Building funds for Outcome Measurement Training services to a select group of its member agencies in 2003. **Legal Aid Services of Oklahoma (LASO)** was one of 10 agencies to participate in the program. A consultant worked with the LASO team for a period of 110 hours during the year. The **United Way of Central Oklahoma** has committed to provide funding to continue this process with the consultant for an additional 75 hours through 2004. The United Way logic model approach described in the book, Measuring Program Outcomes: A Practical Approach, is the one being used by LASO.

Getting Started

LASO formed a core team to work on outcome measurement. It was comprised of: the Director of Litigation, the Managing Attorneys of the largest two law offices in the state, the Resource Development Specialist; the Managing Attorney of the Hotline, an Info Technology staffer, the Community Ed and Pro Se Coordinator, and support staff.

**Gary Dart is Executive Director for Legal Aid Services of Oklahoma, Inc.
Denise Caudill, The Outcome Zone, Oklahoma City, is a consultant for LASO.*

The team met 15 times during the year to:

- Identify outcomes
- Construct the logic model
- Develop outcome measurement framework
- Design questionnaires
- Develop procedure
- Field-test the OM plan and tools
- Revise procedures and questionnaires
- Prepare an implementation plan for 2004

The Legal Aid Services of Oklahoma Logic Model

The essential starting point was to develop a logic model. It is a flowchart showing the relationship between what we put in (inputs), what we do (outputs), and what results (outcomes) for the clients in a series of if-then relationships. The model was revised and improved numerous times throughout the outcome measurement planning process.

Designing the Framework

The Outcome Measurement team faced a number of challenges during the planning process, including the following critical questions:

- **Whose outcomes to measure -- all clients or some clients?**

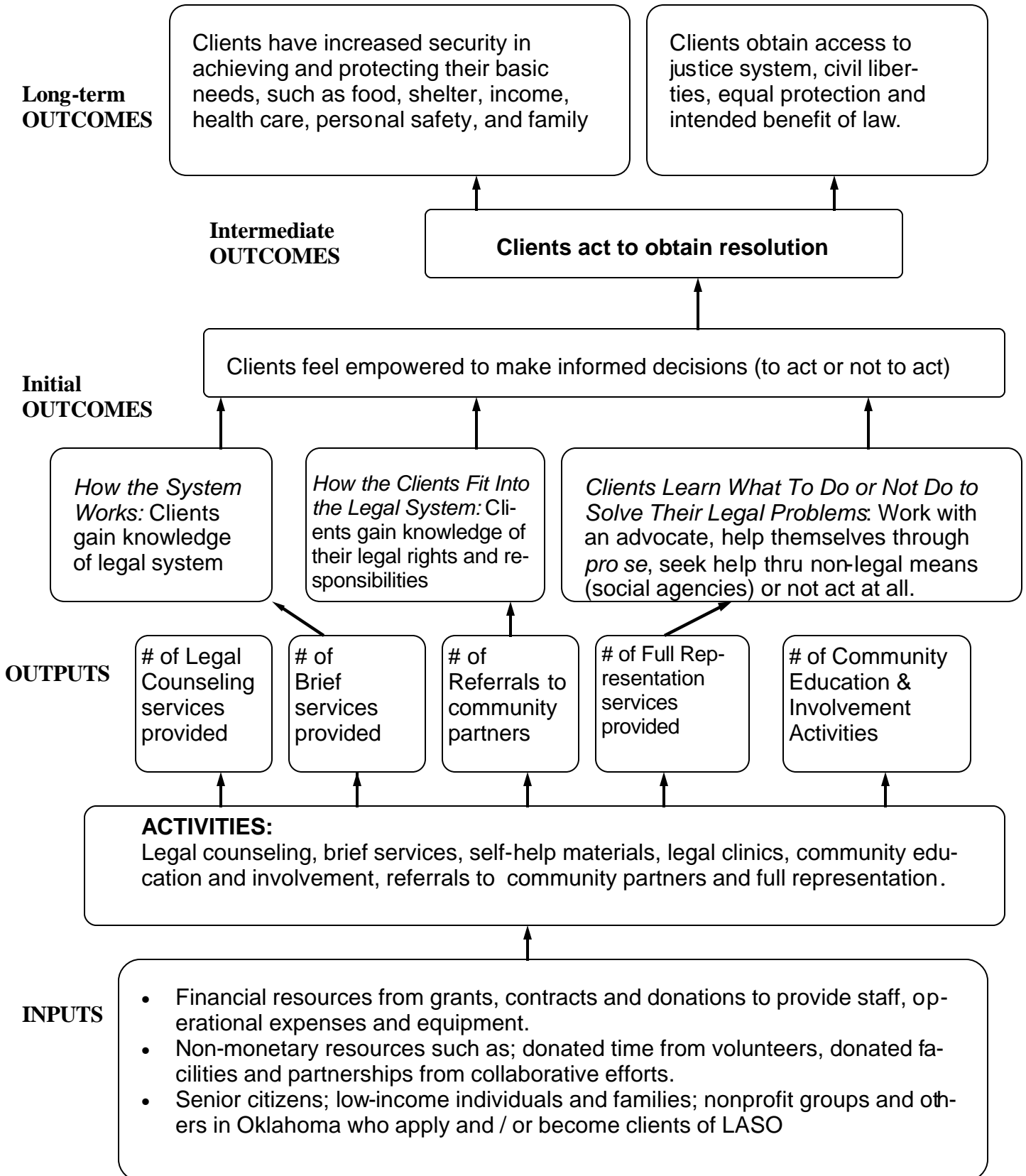
At first LASO aimed toward measuring outcomes with only family law clients. However in the process of designing the logic models, the team realized the outcomes fit all case types. And the benefits of measuring the outcomes of all clients outweighed the benefits of limiting to only family law clients. But due to privacy issues, battered women still living with the abuser and HIV/AIDS clients were excluded

- **Deciding how to categorize -- reason closed or type of service provided?**

The team decided that different questions should be asked of clients receiving limited services as opposed to clients receiving court representation. The next step was to decide how to define the different types of services. Initially the categories were traditional legal services case categories as defined by reason closed: advice, brief services, negotiation and litigation.

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LEGAL AID SERVICES OF OKLAHOMA Outcome Measurement Logic Model



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Ultimately The OM team created new definitions of service categories for identifying cases and clients to include in the outcome measurement process. They are:

- **TOOLS:** Giving a client advice, information, self-help (*pro se*) materials or forms that the client needs to understand possible options and/or to address their legal problems on their own.
- **TRANSACTIONS:** Serving a client with non-advocacy legal work that resolves the client's problem with the drafting of documents, such as; wills, deeds, contracts, DPOA, incorporation, application for tax benefits, advanced medical directives/DNR.
- **REPRESENTATION:** Advocacy on behalf of a client with or without litigation, such as negotiation with a landlord, appearing in court or administrative hearing.
- **NOT A CASE:** Matters, such as community education and referrals without legal advice, are NOT cases to be included in outcome measurement.

These new definitions of service for outcome measurement will be a new variable in the CLIENT system to be coded at the time of case closing.

At the start of the process, the team focused on designing the outcomes logic model based on closing codes. A challenge faced by the LASO team was to get away from the concepts of closing codes, reason closed, and main benefits common to the legal services programs and to embrace the concept of outcomes from the clients' point of view which is central to the social services model of outcome measurement.

- **Use telephone interview surveys but when and by whom?**

Several options for conducting telephone interview surveys were considered:

- At the end of the last phone contact by the attending attorney
- At the end of the last phone contact by another to whom the call is transferred.
- After a period of time of the last phone

contact

- After a period of time of case closing

In the end the team decided that all outcome measurement telephone interviews (with the exception of the hotline clients) will take place following the closing of cases. Cases will be closed within one week of final service, that is the final activity and/or contact that benefits the client. Phone interviews will be conducted by a person other than the attendant attorney to gather information from clients on outcomes.

For the Hotline clients, the team decided to administer the tools initial survey at the end of the phone call.

Data Collection Questionnaires

A core set of questions were developed from which four different questionnaires have been prepared for measuring client outcomes based on type of service:

- Tools Initial
- Tools Intermediate
- Transactions
- Representation

The Tools Initial questionnaire when combined with Tools Intermediate questionnaire is the equivalent of the Representation questionnaire. The Transactions and Representation questionnaires are the same, with the exception of an additional question in the Representation survey concerning impression that their side of the problem was heard. Each of the four questionnaires includes questions concerning LASO staff courtesy, helpfulness and suggestions for improvement.

Field testing

Field test phone interviews were conducted with a sample of all clients in the Oklahoma City office and hotline clients in the Tulsa office. In the Oklahoma City field test, 78 calls were made and 24 interviews were completed, a response rate of 31 percent. Twelve of the 78 calls (15%) attempted were to disconnected numbers.

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The remaining 42 attempted calls (54%) were answered by an answering machine (18), someone other than the client (10), no one (9), the client but the interview was refused (4) or a busy signal (1). Of the 24 interviews completed, 16 were assessed on tools outcomes, four were transaction outcomes and four were representation outcomes.

In the Tulsa Hotline office 26 interviews were attempted and completed.

As a result of the fieldtesting, the OM team was able to make many improvements in the data collection plan, tools and procedures, among them:

- Simplify and improve wording of questions
- Improve opening statement
- Improve format of questionnaires, placement of questions and response devices
- Reinforce procedures, such as callers should not leave messages on answering machines

- Addition of more information and response options in call sheet
- Process for providing feedback to attorneys if clients indicate need for more information
- Identified the need to attempt to reach people by phone in the evenings and/or week-ends

In addition to testing the questions and questionnaire, the field testing process was a mechanism to enable LASO staff to become acquainted with the OM process. In one office, each attorney was given 10 cases to interview. The staff were surprised by the challenge of reaching people during working hours and by some of the more negative responses. They gained new perspective in relating to clients. Since the field testing experience, their supervisor has seen dramatic change in attitude toward clients among staff.

**LEGAL AID SERVICES OF OKLAHOMA
OUTCOME MEASUREMENT FRAMEWORK**

INITIAL Outcomes	Indicator	Questions
<i>How the System Works:</i> Clients gain knowledge of legal system	# & % of clients who understand the legal system # & % of clients who understand whether or not their problem can be solved by legal system	As a result of services received from Legal Aid, do you understand the legal system better? As a result of services received from Legal Aid do you understand whether or not your problem can be solved by the legal system?
<i>How the Clients Fit Into the Legal System:</i> Clients gain knowledge of their legal rights and responsibilities	# & % of clients who understand rights and responsibilities of client and adverse party	As a result of services received from Legal Aid, do you understand your rights? As a result of services received from Legal Aid do you understand your responsibilities, or what you're supposed to do?
<i>Clients Learn What To Do or Not Do to Solve Their Legal Problems:</i> Work with an advocate, help themselves through <i>pro se</i> , seek help thru non-legal means (social agencies) or not act at all.	# & % of clients who understand options and merits of those options	As a result of services received from Legal Aid, do you understand your options? As a result of services received from Legal Aid, do you understand the pros and cons of those options?

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INTERMEDIATE Outcomes	Indicator	Questions
Clients feel empowered to make an informed decision (to act or not to act)	# & % of clients with increased confidence, hope, self-determination	Are you feeling better about the reason for your contact with Legal Aid? Are you more confident that you will be able to handle problems like this in the future? Did the help you received from Legal Aid reduce your worry and stress?
Clients act to obtain legal resolution	# & % of clients who acted or did not act consistent with legal options	Did Legal Aid help you to solve your problem? Did Legal Aid help you keep the problem from getting worse?
LONG-TERM Outcomes	Indicator	Questions
Clients have increased security in achieving and protecting their basic needs, such as food, shelter, income, health care, personal safety, and family relationships.	# & % of clients who feel they have increased stability	As a result of the help from Legal Aid, are you (and/or your family) better off today?
Clients obtain access to justice system, civil liberties, equal protection and intended benefit of law.	# & % of clients who feel they obtained access to justice system, civil liberties, equal protection and intended benefit of law.	Do you think your side of the legal problem was heard? Do you think that receiving help from Legal Aid made a difference in whether or not you had access to the legal system?

Sampling Procedures

A proportional representative random sample of closed cases will be selected to be interviewed. The sample size is derived from a total of all cases across the state by type of service categories. Based on volume of cases served by LASO offices in 2002, the estimated sample size for number of cases to be interviewed annually are:

	OKC	Lawton	Norman	Ard.	Still.	Clinton	Tulsa	Hugo	Musko.	Bartles	Hotline	Total
Service												
TT1	178	122	89	89	89	56	78	100	155	56	133	1145
TT2	178	122	89	89	89	56	78	100	155	56	133	1145
REP	112	88	64	56	48	48	128	88	96	56	0	785
Annual	468	332	242	234	226	160	284	288	406	168	266	3075
Monthly	39	28	20	20	19	13	24	24	34	14	22	256

(continued from page 13)

Outcomes will be assessed weekly during a follow-up phone call with a sample of clients by a person other than the attendant attorney. Lists (described below) will be randomly generated on Mondays each week.

These lists will serve as the sampling frames. Survey interviews will be conducted during the week that the sampling lists are generated.

- o For Tools 1 (initial survey) – all tools cases closed during previous week
- o For Tools 2 (intermediate survey) – all tools cases closed 5 weeks back
- For Transactions – all transactions cases closed 5 weeks back

- For Representation – all representation cases closed 5 weeks back

This process assumes no back-dating of closing. Domestic violence no contact cases, farmer work programs and HIV/AIDS cases will be excluded.

Each office will calculate the number of interviews needed from these weekly lists.

Call sheets will be generated for the cases selected into the sample. For each selected case a call sheet will be prepared including the information in the left column and bottom section. Interviewers will fill-in the information in the right column.

Outcome Measurement Call Sheet	
<p>Service Provided</p> <p><input type="checkbox"/> Tools</p> <p><input type="checkbox"/> Transactions</p> <p><input type="checkbox"/> Representation</p> <p>Level of Service</p> <p><input type="checkbox"/> Fully Served</p> <p><input type="checkbox"/> Partially Served</p> <p>Problem Code : _____</p> <p>Case Closing Code : _____</p> <p>Advocate Code : _____</p> <p>Case Number: _____</p>	<p>OM Study # _____</p> <p>Survey Date : _____</p> <p><input type="checkbox"/> Interviewed client</p> <p><input type="checkbox"/> Refused</p> <p><input type="checkbox"/> Client not in; phone answered by another</p> <p><input type="checkbox"/> Busy</p> <p><input type="checkbox"/> No answer</p> <p><input type="checkbox"/> Machine answered</p>
<p>Last Name _____ First Name _____</p> <p>Phone Number(s) _____</p> <p>Call Instructions: _____</p>	

A six part study number will be assigned each client interviewed in the OM assessment process. For example: **OM - 04 – 5 – 1 – 10 – 0001**

Outcomes	Year	Office	Survey Week		Week	Completed Survey
OM	04	1 - 11	1 = tools1 2 = tools2	3 = trans 4 = rep	01- 52	0001 >

(continued from page 14)

Data Collection Procedures

The questionnaire forms are available in two formats – electronic copies or hard copies on paper. This will facilitate the process of making phone calls outside of the office and by volunteers at home. Interviewers will attempt to interview as many cases as they have on the call sheets. They will fill-in the right column of call sheets for all calls attempted. When an interview is completed the call sheet will be attached to the completed survey form.

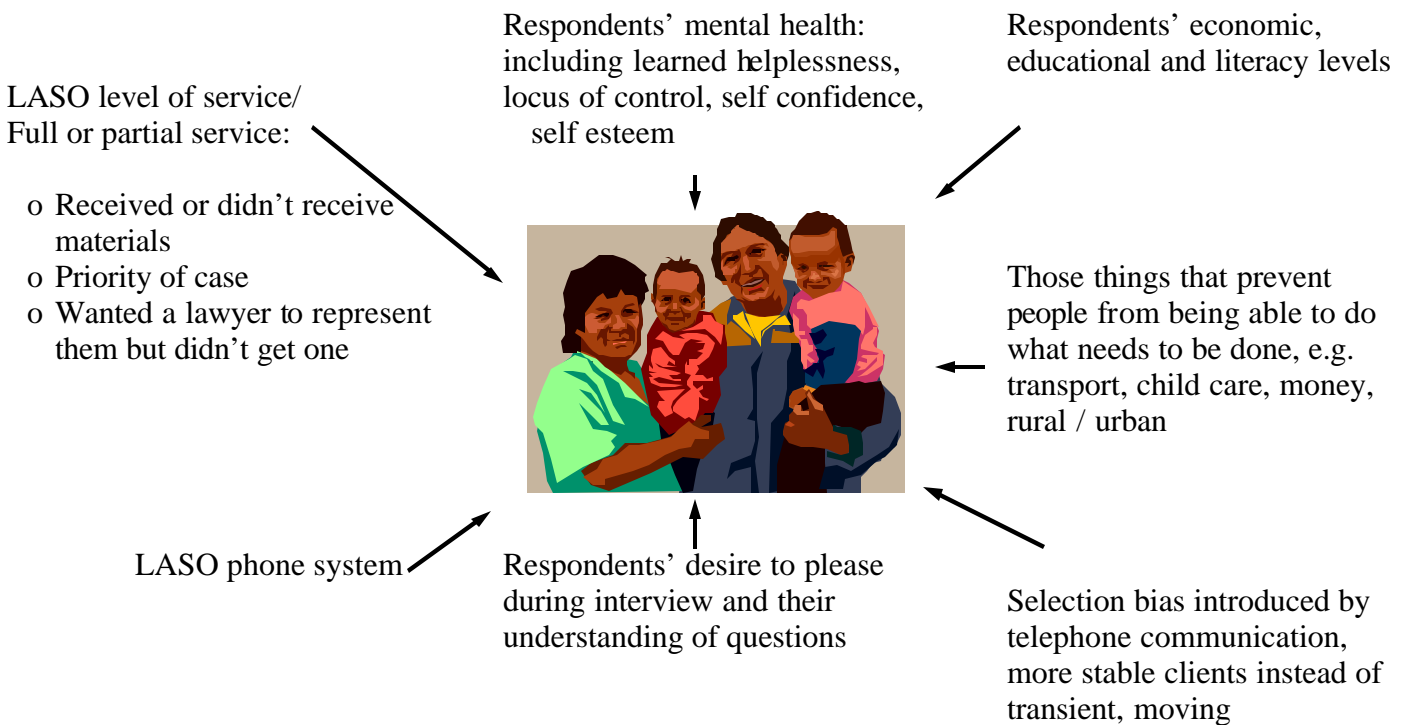
Based on field-testing in the Oklahoma City and Tulsa offices, the best time to find clients at home is in the evening. Ideally, staff and volunteers who do the interviewing will do the telephone calls between 7:00 and 9:00pm

Interviewers will read the questions as written on the questionnaires. If a respondent does not understand, the interviewer may paraphrase the questions and responses. Interviewers are also encouraged to paraphrase the introduction paragraph.

If respondents ask for legal advice, the interviewers should respond by saying they are not attorneys but will ask for one to call the client at a later time. Each questionnaire form has a box at the end for interviewer comments.

Influencing Factors

Response rate and results of the interviews will likely be influenced by a number of factors, including those specific to LASO and those specific to the clients served.



Data Input and Analysis

Data will be entered into Excel spreadsheet. At a later date, data by case may be merged into the main information system. Codes will be developed for the open-ended questions after enough interviews are conducted to determine common responses that can be clustered. Single variable analysis showing frequencies of responses (number and percentage) will be run on all variables. Cross tabulation from multiple variables will be conducted on some key factors. Quarterly and annual reports will be generated by each office. LASO administration will combine and provide statewide results

Legal Aid Services of Oklahoma Outcomes Survey: Client Interview: Tools: Initial Outcomes

Hi, my name is _____ and I'm a volunteer calling on behalf of Legal Aid Services of Oklahoma. Could I please speak with _____? We are helping Legal Aid find out what people think of their services. They indicated you talked to them about a _____ matter. Would you be willing to answer a few questions about that?

☐ Yes ☐ No Thanks anyway. (END PHONE CALL & COMPLETE FORM)

Great, Thank you. For each of the following questions, please respond by answering Yes, No, Somewhat, Not sure or Not Applicable.

1. As a result of services received from Legal Aid do you understand the legal system better? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

2. As a result of services received from Legal Aid do you understand whether or not your problem can be solved by the legal system? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

3. As a result of services received from Legal Aid do you understand your rights? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

4. As a result of services received from Legal Aid do you understand your responsibilities, or what you're supposed to do? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

5. As a result of services received from Legal Aid do you understand your options? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

If yes, ask

Q6, all other

Responses

Skip Q6 and go to

Q7

6. As a result of services received from Legal Aid do you understand the pros and cons of those options?

(Interviewer: circle the response)

Yes No Somewhat Not Sure Not Applicable

7. Would you say the staff has been:

- Courteous (skip to Q9)
 Somewhat courteous
 Not courteous
 Other (write explanation)

8. How could the staff have been more courteous?

(Write response)

If answer is "courteous" skip to Q9, all other responses, ask Q8

9. How helpful overall has Legal Aid been to you?

- Very helpful
 Some what helpful
 Not very or not at all helpful
 Other (write response)

10. May I ask you to explain why or how the staff could have been more helpful?

Yes (write response) No

11. If there was one thing Legal Aid could do better, what would it be?

12. Do you have any other comments?

Thank you for your time .

To view the Survey Instruments for the Transaction and Representation Outcomes, please see the complete Report at <http://www.legalhotlines.org>

To get more information about the Oklahoma Outcome Project contact:

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FROM THE FRONTLINE

The Top Ten Reasons It's Great To Be A Northwest Justice Project/CLEAR Telephone Hotline Advocate.
By Robert Adelman

10. I CAN LOOK AND DRESS ANY WAY I LIKE.

My personal appearance has not changed much since 1968. Its not that I'm inflexible, its just that bringing sharp instruments to my face to scrape hair off just doesn't resonate with me. And all the money I save on razors and haircuts has let me--a lowly legal services attorney--afford a house in Seattle. So for years people in legal services thought, "what should we do with Robert" And then they figured it out "Put him on a telephone hotline. That way no one will see him".

9. COFFEE. I can drink coffee all the time, any time. Not a problem when you are on the phone. And its FREE in my office. Of course in Seattle we have the local CAFÉ Act. The Coffee Assistance For Employees Act enshrined in city law. That is the actual reason that Starbucks grew to be a commercial power in the city.

8. RANTING. I love to rant. I'll rant about any level of government, the environment, the high price of donuts. And as a telephone hotline advocate I GET PAID TO RANT. In harmony with my clients. And they love it. "Yes it absolutely stinks that the landlord can give you a 20 day no cause eviction notice..." "I have no idea how they expect you and your child to live on \$440 a month..." We rant in harmony, in unison and in solidarity. Of course I always make sure my rants do not violate any LSC regulations.

7. I GET TO BIKE TO WORK. This is actually related to No. 1. But I don't have to wear a suit. Have you ever tried biking in a suit?. First of all if you are really bad at tying a tie it may be so uncoordinated that it is long enough to get caught in your gears. And you may think you look really sharp in a crisp white shirt and grey pinstripe suit, but you don't. Not if your tie and cuffs have ugly bike grease on them. Trust me. I speak from experience.

6. I NEVER GET PAPER CUTS. That's right. I sit at a computer with a telephone headset and never have to deal with the danger of paper-cuts. Workers comp is nice but I prefer my health.

5. TELEPHONE YOGA. I can talk on the phone and

do yoga. You know down-line facing dog. Chair pose. "Hey you still there" Concerned client. "Oh yeah I just had a crick in my back and I have my left ear tucked under my right knee. Sorry. But I think I have a referral for you..."

4. I DON'T HAVE TO CALL ANYONE "YOUR HONOR" There are some smart judges, there are some dumb judges and there are a passel of mediocre judges. They are people. Like you, me, and our clients. And they are our employees. County workers. Not our betters. So I never really liked calling them "Your honor." Especially now that most of them are younger than me. And as I telephone hotline advocate I never do.

3. NO ONE BUGS ME ABOUT NOT HAVING A CELL PHONE OR ANSWERING MY PHONE AT HOME. "I know mom but I am on the phone all day with people in crisis..."

2. I HAVE A WIDE BASE OF KNOWLEDGE. As a telephone advocate I need to know many forensic areas. I use to joke, "Since becoming a hotline advocate I have learned to malpractice in many areas of the law" but that made both management and our insurance carriers nervous. Now I just consider myself a renaissance man. I can use a word I dread "eclectic" to describe my knowledge base. And I even know legal topics useful to my friends. Now, I can actually explain to them their rights as tenants or how to write a will. Or a good defense to a jaywalking ticket..

1. I WAKE UP EVERYDAY AND I AM EXCITED ABOUT GOING TO WORK. I have been an attorney for almost thirty years. And I have always worked in the public sector. I have loved every legal job I have had the last 30 years. I have never gotten up in the morning bummed about having to go to work. I love to go to work Well okay after a month of Seattle drizzle the mountains may lift their skirt and like any healthy person I would rather play in the sun then be in an office, but that is rare. And it is nothing to do with negative feelings about work, just positive feelings about vitamin D. And that is because I am passionate about our clients' plight, my coworkers are people I respect and enjoy being around and the management is as (or more) committed then I am to equal justice.