

Launching the LSC Matters Reporting System



***Webex Meeting
June 19, 2001
Washington, D.C.
and Across the Country***

This Meeting Has Three Purposes:

- **Convey information you'll need**
for getting ready to implement Matters reporting.
- **Get communication system in place for...**
 - *Answering any questions that come up.*
 - *Sharing good ideas among the community.*
- **Flag support the LSC Results Group can provide...to:**
 - *Make system easier to apply.*
 - *Avoid obvious problems.*

Agenda

- **Overview of the Matters Reporting System**
- **Data collection and tabulation**
- *Time out for questions*
- **Logistics & timetable**
- **Next steps & responsibilities**

Some Guidelines for Today:

- **We'll try to be efficient.**
 - 2 hours max.
 - Webex participants will appreciate our keeping things moving.


- **We needn't solve all problems today.**
 - We'll flag issues that require follow-up after today's meeting.
 - We have a system for resolving issues going forward.

Overview of the Matters Reporting System



- **Purposes**
- **Themes of the story we're trying to tell**
- **Six categories of "Matters"**
- **Narrative portion of the MSR**

LSC's Goals for the System



- **Provide an opportunity to report what you do.**
 - Broader range of your services
 - not just “cases.”
- **Re-align our information system...**
With “integrated comprehensive delivery system” mandate.
- **Supplement our existing reporting process (CSR)...**
 - Keep it simple and non-burdensome
 - Powerful

Themes of the Story We Are Trying to Tell



- **“We provide access to the legal system for people who have nowhere else to turn.”**
 - We use a wide range of methods.
 - We address people’s needs applying the appropriate level of service.
 - We make a big difference in people’s lives.
- **“We serve a lot of people with the resources we are given.”**

This system is NOT...

- **“Outcomes” reporting**
- **“Performance measurement”**

Those will be addressed later.

–A separate, multi-year effort

Major Features of the MSR System



- Part of annual **Grant Activity Report** process
- **Six categories of “Matters” ...**
 - Community Legal Education
 - Pro se assistance
 - Referrals (non-”case”)
 - Outreach
 - “Indirect” services
 - Other

Major Features (Continued...)

- ***Asks for two kinds of information:***
 - ***Narratives***
 - Brief
 - Descriptive
 - ***Numbers***
 - *# people served*

Major Features (Continued...)

- **Can be implemented with only minor modifications in systems**
- **Some case management systems already can accommodate “Matters.”**
 - Kemp’s
 - WNYLC “Time” system

The Six Categories of “Matters”

The next several slides will individually cover...

- Community Legal Education
- Pro se assistance
- Referrals (non-“case”)
- Outreach
- “Indirect” services
- Other

1. Community Legal Education

Models:

- Presentations
- Brochures
- Materials on Web sites
- Newsletter articles
- Videos
- Other

People served:

- Measured...

...estimated

...and total

Grand Totals

"Matters" Service Report Part I: Statistical Portion Community Legal Education

	Number of People Directly Receiving Service		
	(a) Measured	(b) Estimated	(c) Total
A Models Used			
1. Presentations to community groups <i>Total number of people in audiences</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
2. Legal education brochures <i>Total number of copies distributed</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
3. Legal education materials posted on Web sites <i>Total number of page hits</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
4. Newsletter articles addressing Legal Ed topics <i>Total number of copies distributed</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
5. Video/legal education materials <i>Total number of people in audiences</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
6. Other -- Describe in Narrative section. <i>Total number of people receiving service</i>	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
Total number of people directly receiving service	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>

provide a breakdown of this number, by type of matter, in "B" on next page.

Substantive Areas for “Numbers of People” breakdowns

“Subject Matter” categories Track CSR:

- Consumer/Finance
- Education
- Employment
- Family
- Etc.

“Other / Multiple Topics” category can be used for...

- Reporting on topics that don’t fit into CSR categories 1-9.
- Events that cut across CSR categories.

“Matters” Service Report Community Legal Education (continued)

B. Subject Matter Categories	Number of People Directly Receiving Service
1. Consumer/Finance	<input type="text"/>
2. Education	<input type="text"/>
3. Employment	<input type="text"/>
4. Family	<input type="text"/>
5. Juvenile	<input type="text"/>
6. Health	<input type="text"/>
7. Housing	<input type="text"/>
8. Income Maintenance	<input type="text"/>
9. Individual Rights	<input type="text"/>
10. Other / Multiple Topics	<input type="text"/>
Total number of people directly receiving service	<input type="text"/>

*Should be same as
“A” on previous page.*

2. Pro se assistance

A. Models:

- Workshops or clinics
- Court help desks
- Self-help materials...
 - Posted on Web sites
 - Kiosks
- Other

Numbers:
Same as for
Community
Legal
Education...

**Number of
people
served**
(Measured,
estimated and
total)

**"Matters" Service Report
Pro Se Assistance (continued)**

B. Subject Matter Categories

	Number of People Directly Receiving Service
1. Consumer/Finance	<input type="text"/>
2. Education	<input type="text"/>
3. Employment	<input type="text"/>
4. Family	<input type="text"/>
5. Juvenile	<input type="text"/>
6. Health	<input type="text"/>
7. Housing	<input type="text"/>
8. Child Maintenance	<input type="text"/>
9. Individual Rights	<input type="text"/>
10. Other / Multiple Problems	<input type="text"/>

Do same as previous page

**"Matters" Service Report
Pro Se Assistance, not included in "case service" statistics**

A. Models Used

	(a) Measure	(b) Estimated	(c) Total
1. Workshops or clinics <i>Total number of participants</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Help desk at court <i>Total number of people assisted</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Self-help printed materials (e.g., Divorce kits) <i>Total copies distributed</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Self-help materials (e.g., forms) posted on web sites <i>Total page hits on these materials</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Self-help materials (e.g., forms) at kiosks	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Self-help materials at court section.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total number of people directly receiving service	<input type="text"/>	<input type="text"/>	<input type="text"/>

Also provide a breakdown of this number, by type of matter, in "B" on next page.

B. Subject matter breakdown:

- CSR categories 1-9 plus...
- "Other / Multiple Topics"

3. Referrals (non-"case")

A. Types of Referrals:

- Other civil legal services
- Private bar
(not affiliated with program)
- Human or social services
- Other source of assistance

Numbers:
Same as before:
Number of people served
(Measured, estimated and total)

A. Models Used

	Number of People Directly Receiving Service		
	(a) <i>Measured</i>	(b) <i>Estimated</i>	(c) <i>Total</i>
1. Referred to other provider of civil legal services to low income people	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
2. Referred to private bar (LRS or individual private lawyers not affiliated with program)	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
3. Referred to provider of human or social services (non-legal)	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>
4. Other source of assistance (other than any of the above--total, estimated, and measured)	<input type="text"/>	+ <input type="text"/>	= <input type="text"/>

Total number of people directly receiving service

Also provide a breakdown of this number, by type of matter, in "B" on next page.

"Matters" Service Report Referred Matters (continued)

B. Subject Matter Categories

	Number of People Directly Receiving Service
1. Consumer/Finance	<input type="text"/>
2. Education	<input type="text"/>
3. Employment	<input type="text"/>
4. Family	<input type="text"/>

5. Health Care
6. Housing
7. Immigration
8. Non-Legal
9. Other / Multiple Topics
10. People Receiving Service

add the number of people receiving service from previous page

B. Subject matter breakdown:

- CSR categories 1-9 plus...
- "Other / Multiple Topics"

***Review: We've covered three types of Matters –
CLE, Pro Se, Referrals***



All three require the same kinds of information...

- **Number of People Served**
 - Measured, estimated and total
- **Breakdowns by...**
 - Models used to deliver the services
 - CSR subject matter categories 1-9 and “Other/Multiple Topics”

*The next two types of Matters –
require slightly different information.*



- *Outreach*
- *Indirect Services*

Models:

- Media notices
- TV spots / PSAs
- Radio “ “ “
- Newsletters
- Referral agreements
- Outreach on Web sites
- Other

4. “Outreach”

“Matters” Service Report Outreach

Check All
Applicable
Methods Used
*Check only the
methods your program
has employed during
the reporting period.*

Models Used

1. Informational notices published in print media
2. TV spots or PSAs
3. Radio spots or PSAs
4. Newsletter(s) -- external to program
5. Referral agreements with other agencies
6. “How to reach us” pages on web sites
6. Other -- *Please describe in Narrative..*

Two types of information are requested.

1. “Check the boxes” indicating *all* models used by your program
2. Describe them in the “Narrative” portion of the Matters Services Report.

5. "Indirect" services

Models:

- Legal education for lay service providers
- Collaborative service delivery models
- Other

"Matters" Service Report "Indirect Service" Matters

Check All
Applicable
Methods Used
*Check only the
methods your program
has employed during
the reporting period.*

Models Used

1. Legal education for lay service providers.
2. Collaborative service delivery models
3. Other indirect service matters
Please describe in Narrative.

"Check the Box"

- Check the models used by your program
- Describe them in the "Narrative" portion of the Matters Services Report.

The sixth Matter type -- "Other" -- is a hybrid.

Two models:

- **Mediation / ADR** services
- **Other** – none of the above
Captures new models or atypical services.

A. Models Used

1. Mediation/alternative dispute resolution services not included in "case service" statistics.

2. Other matters, none of the above
Please describe in Narrative.

Yes

No

"Matters" Service Report Other Matters - Mediation / ADR

Number of People Directly Receiving Service

(a) Measured	(b) Estimated	(c) Total
<input type="text"/>	+ <input type="text"/>	= <input type="text"/>

Also provide a breakdown of this number, by type of matter, in "B" on next page.

"Matters" Service Report Other Matters - Mediation / ADR (continued)

B. Subject Matter Categories

Number of People Directly Receiving Service

1. Consumer/Finance

Should be same as "A" on previous page.

Other

- Check if applicable.
- Describe in "Narrative" MSR.

Mediation / ADR

- A. Number of people served
- B. Breakdown by CSR codes 1-9 and "Other"

Narrative Portion of the Matters Reporting System



The narrative portion of the MSR covers four topics:

- A. Overview of services***
- B. Examples***
- C. Estimation methods***
- D. Other comments (optional)***

...An opportunity to flesh out the story.

Narrative Portion

A. Overview

Brief narrative descriptions of the models you feel are most important

- *Community legal education*
- *Pro se*
- *Etc...*

B. Examples

“Good stories”
illustrating the impact on
clients

Matters Service Report

Part II: Narrative Portion

Program Name: _____

Recipient Number: _____ Date Submitted: _____

Contact: _____

Title _____

E-mail: _____

A. Overview of Services Provided

Please provide a narrative overview (300-1000 words) of the *Matters@services* provided by your program during the reporting period, briefly addressing each of the types of matters listed below for which you reported services in *APart I, Statistics@*.

Examples of topics you might wish to address in your narrative include: goals, service delivery strategies, audiences, results...

1. Community Legal Education
2. Pro Se Assistance, not included in ?case service? statistics
3. Referred, not included in ?case service? statistics
4. Outreach
5. “Indirect Service” matters
6. Other

B. Examples

Narrative Portion continued...

C. Estimation Methods

Descriptions of any estimation methods used.

D. Other Comments (optional)

Matters Service Report

Part II: Narrative Portion

C. Estimation Methods

If you reported estimated numbers for any items in Part I, Statistics, please describe briefly below the estimation methods and sources of data used to arrive at those numbers.

1. Community Legal Education
2. Pro Se Assistance, not included in case service statistics
3. Referred, not included in case service statistics
4. Outreach -- N/A
5. Indirect Service matters -- N/A
6. Other -- Mediation/ADR
7. Explanations and Comments (Optional)

D. Other Comments (Optional)

Please provide any additional information (no more than 150 words) that would help readers to better understand any parts of your Matters Service Report you feel are not completely described by the foregoing information.

How to Collect the Matters Data

Data collection is driven by the three kinds of situations:

- **Services to individuals -- e.g. referrals**
- **Services in group settings – e.g. clinics**
- **Information to the low income population as a whole -- e.g. Web sites, kiosks**

Each requires a different approach for data collection.

1. *Matters handled for individuals*



Examples:

- Referrals
- Provision of legal education materials
e.g., self-help kits, videos...
- Help desk at court

Three kinds of information to be captured for each person served

- Legal problem area
- Type of service provided
- “Good stories” for vignettes

Use case management system or intake log

Modifications needed in case mgt systems

- **Modify pull-down menus**
to accommodate “Completed Matters.”
- **Develop reports**
- **Re-label input screens**
*to make clear distinction between “Cases” and
“Matters.”*
- **Modify queries to select “Completed Matters.”**

2. Matters handled in group settings

Examples:

- **Legal education workshops**
- **Pro se clinics**
- **Legal education for lay service providers**

Three kinds of information to be captured for each event:

- **Number of people who participated**
- **Narrative overview of service**
- **“Good stories” for vignettes**

Data Capture Suggestions

- **Use “Matters” data capture screens in your case management system (if applicable)**
 - Kemp’s has it.
 - WNYLC “Time” system can accommodate it.
- **Develop a simple form to capture data at...**
 - Clinics
 - Workshops
 - Presentations

3. Services to low income population as a whole



Examples:

- **Legal education articles published in newsletters**
- **Client information brochures distributed in client waiting rooms**

Three kinds of information to be captured:

- **Narrative overview of service**
- **“Good stories” for vignettes**
- **Number of people served...**

For example:

- # Page hits on website client information pages
- # Newsletters distributed containing a major CLE article
- # Client brochures distributed

***Estimates are okay
if method is reasonable and documented.***

Data Capture Suggestions

- **Identify responsible person best able to track the information.**

Examples:

- Web master (*# Web Hits*)
- Newsletter editor (*"# Newsletters distributed containing CLE articles"*)

- **Set up a system.**

Example:

- Keep a file on "Matters Report."
Put things in it at the time "Matters Events" happen.

Questions



- **Next we're going to cover logistics of implementation.**
- **Before we do, is there anything we've covered in the description of the MSR system that is not clear?**

Logistics



- **Timetable**
- **Technical Support**
- **Next steps and responsibilities**

Timetable



- **By July 1:** *Data collection begins*
- **July-September:** *Fine-tuning, problem solution*
- **January 1 2002:** Begin data collection for year 2002 services
- **March, 2002:** *Submit “Matters” report to LSC*
covering second half of 2001

Technical Support



- **Support team formed at LSC to handle questions.**
- **E-mail questions to Results Project Group:**
resultsproject@lsc.gov
- **Answers ASAP,**
Usually 3 days or less.
- **Q & A e-mailed to all programs**
(unless you request confidential response).

Next Steps & Responsibilities



- **Programs**
 - *Prepare for data collection startup July 1.*
 - *Track progress & flag issues, problems, solutions*
 - *Respond to “status” questionnaire in late summer or fall*
 - *Submit “Matters” report to LSC in March, 2002*
- **LSC**
 - *Develop answers to questions as they arise.*
 - *Distribute Q & A to participants as the launch proceeds.*