Launching the LSC Matters Reporting System

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

Visit us on the Web at www.GreatPrograms.Org

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...)

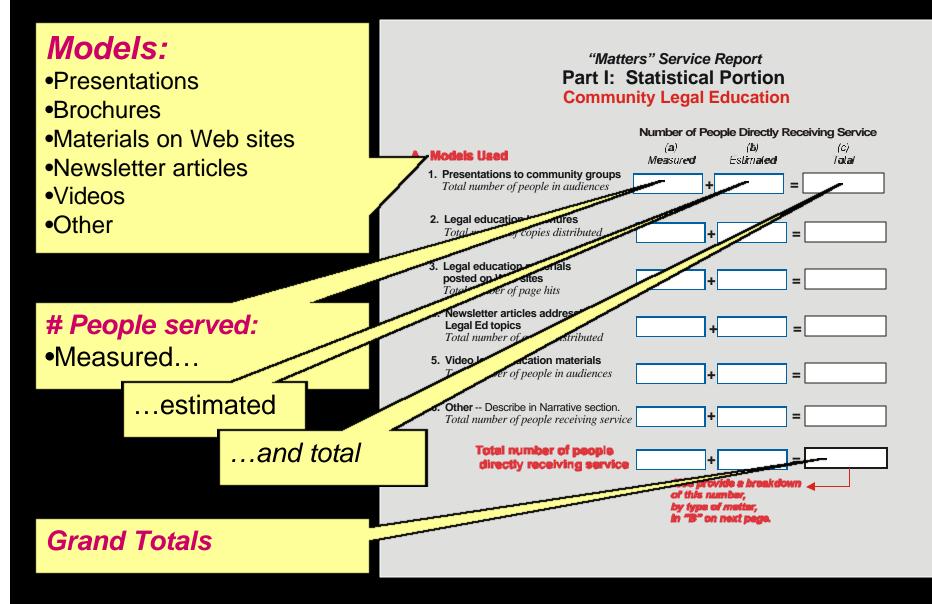
- Can be implemented with only minor modifications in systems
- Some case management systems already can accommodate "Matters."
 - Kemp's
 - WNYLC "Time" system

The Six Categories of "Matters"

The next several slides will individually cover...

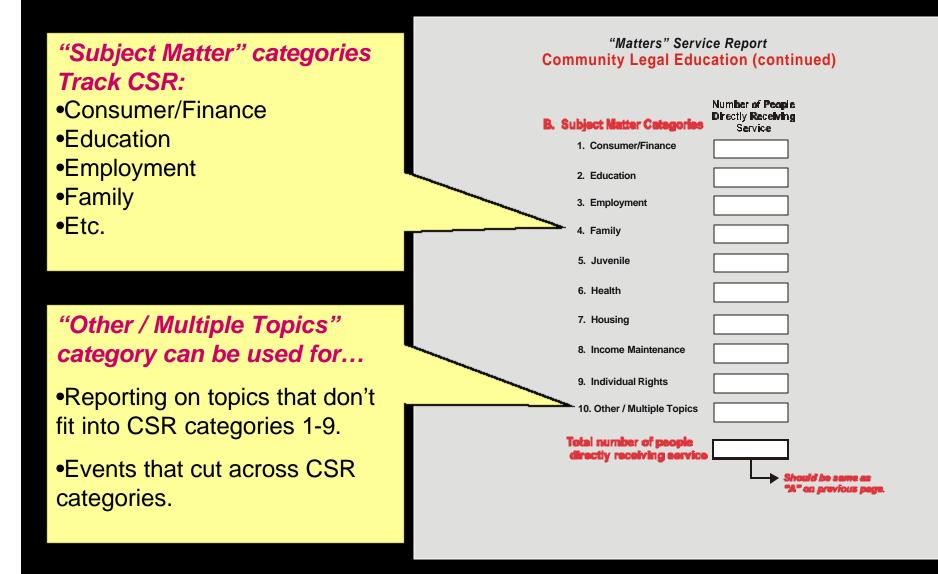
- Community Legal Education
- Pro se assistance
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- Other

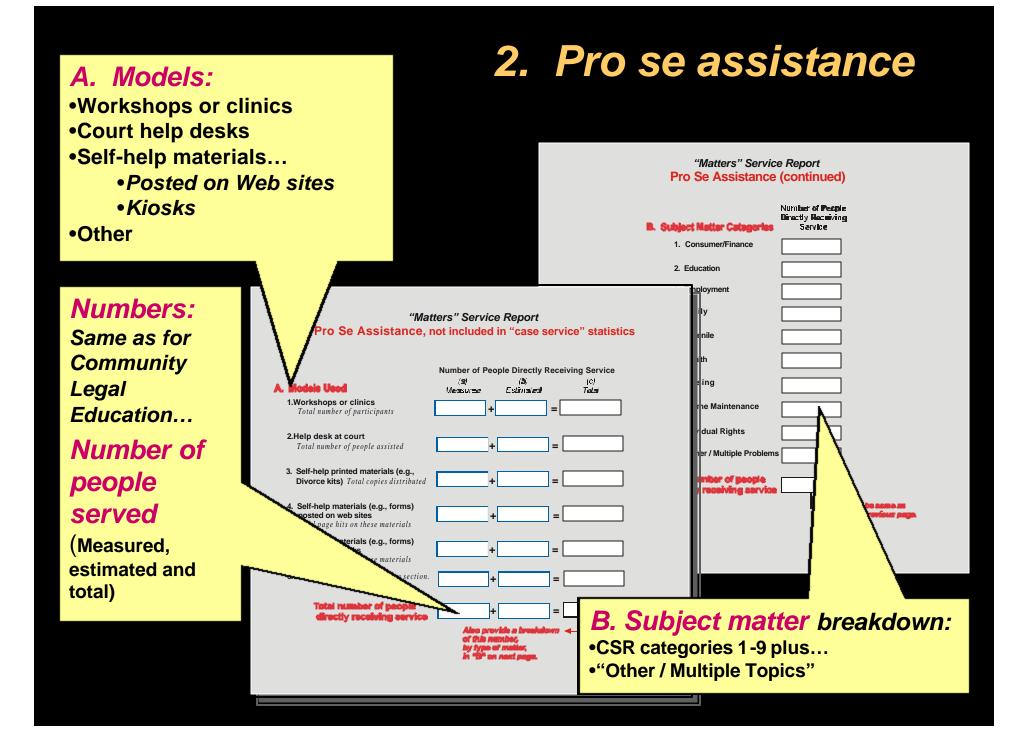
1. Community Legal Education

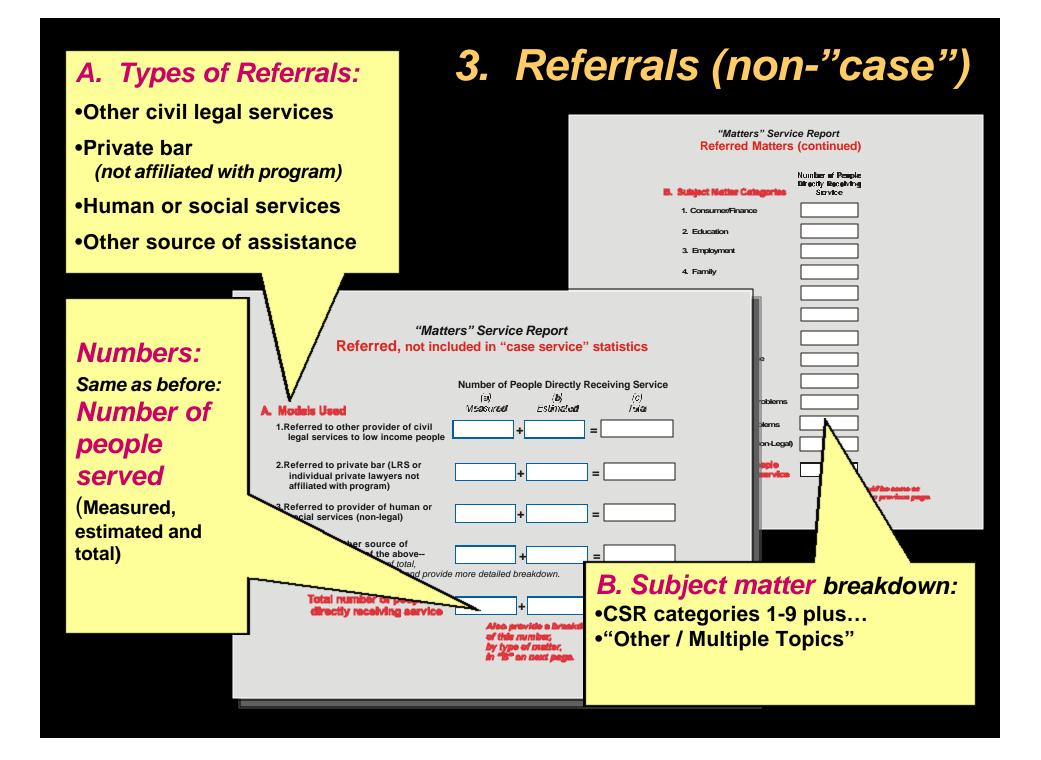


Substantive Areas

for "Numbers of People" breakdowns







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

"Matters" Service Report Outreach

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..

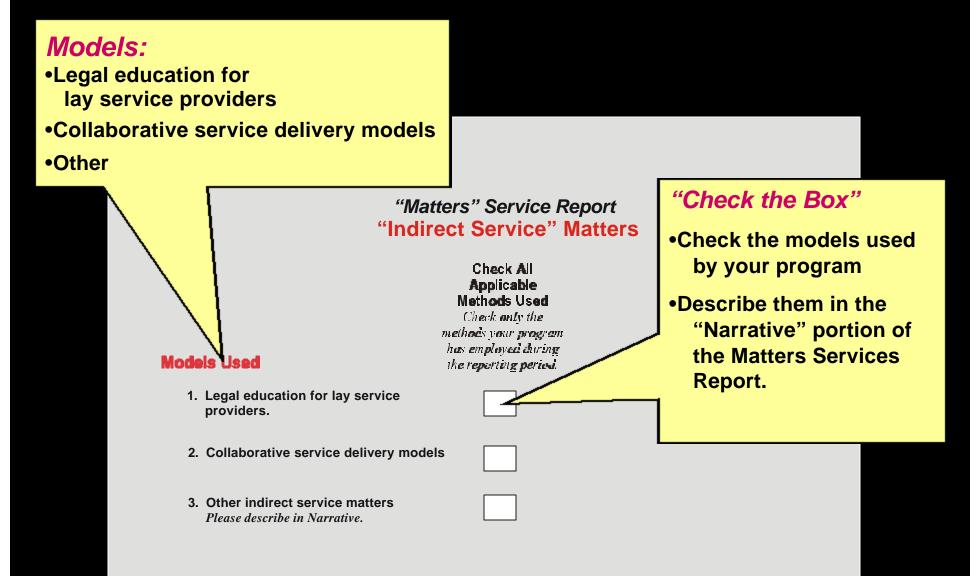
Check All Applicable Methods Used Check only the mathods your progrem has employed during the reporting period.

Two types of information are requested.

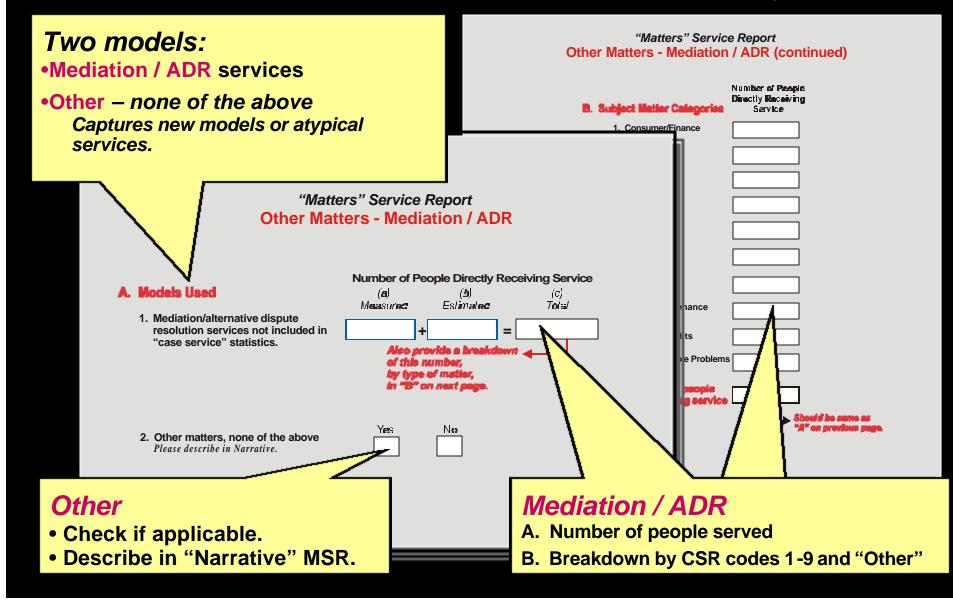
- 1. "Check the boxes" indicating *all* models used by your program
- Describe them in the "Narrative" portion of the Matters Services Report.

4. "Outreach"

5. "Indirect" services



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



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 AMatters@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

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 forgoing 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

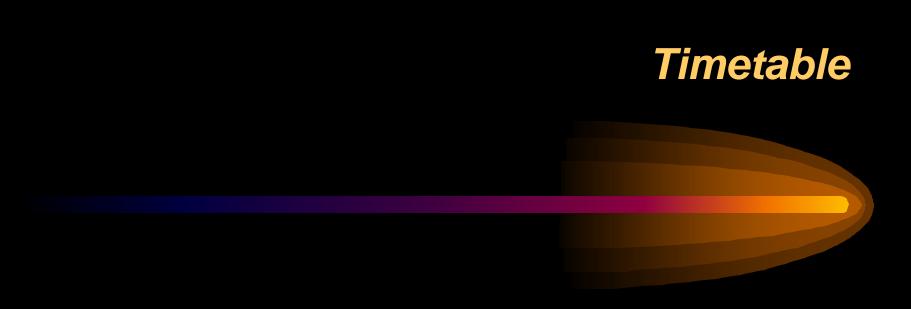
- Identify responsible person best able to track the information.
 - Examples:
 - Web master (# Web Hits")
 - Newsletter editor ("# Newsletters distributed containing CLE articles")
- Set up a system.
 - Example:
 - Keep a file on "Matters Report." Put things in it at the time "Matters Events" happen.



- 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



- **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.