LSC

Legal Services Corporation
Technology Initiative Grant (TIG) Program
Evaluation Plan Form

Grantee name: Ubiquitous Legal Services   **TIG Grant number:** 11555
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Please note*: This sample document is provided as a reference for TIG grantees preparing evaluation plans for online intake projects with substantial triaging components. (TIG staff developed another sample plan for online intake projects that do not involve significant triaging.)* ***This document is provided only as a guide.*** *It will not be sufficient for all online intake/triage projects and may require refinements or different and/or additional information. In preparing their plans grantees should consult the evaluation planning and final reporting resources on the TIG website (http://tig.lsc.gov),including the archived evaluation planning webinar. Please direct questions regarding evaluation planning to Bristow Hardin, OPP Program Analyst, 202-295-1553, hardinb@lsc.gov.*

Project Goal: Increase low-income individuals' access to services and the program's operational effectiveness and efficiency by developing and implementing a new program-wide on-line intake and triage system.

Project Objective:
Develop and implement an on-line intake system and triage system with an A2J interface that enhances clients' ability to at any time readily apply for legal services and access appropriate legal information and resources via the web. [Note: Projects utilizing an interface other than A2J should amend this objective.]

Strategies / Activities:
- Develop an on-line A2J intake and triage system that: (1) enables applicants to easily enter necessary information into the application for the program's services; (2) conducts a preliminary assessment of the applicant's needs and circumstances; and (3) provides applicants with access or refers them to resources and information based on this preliminary assessment.
- Test system and make changes based on test results
- Implement on-line A2J intake and triage system

- Post links to the on-line intake system the statewide legal services website and other appropriate websites
- Conduct publicity and outreach activities to inform low income community and partners about system
- Develop/implement evaluation surveys for on-line system applicants
- Develop/implement survey or other mechanism to obtain information from program staff regarding the system's effectiveness and efficiency

Evaluation Data:
- Description of most significant functionalities of the A2J intake-triage system
- Description of test protocols, significant results and major changes based on test results
- Links to on-line intake form on statewide website and other appropriate websites
- Administrative data such as: (1) number of people using on-line application; (2) times of day on-line applications are filed; (3) number of people who complete the on-line application as original application vs. attempting to call first (from user survey); (4) number of users assigned to different triage categories (e.g., priority service, non-priority service, not eligible); and (5) system "down-time" because of technical problems.
- User survey results re: ease of use, technical problems, triage quality control issues, suggestions for improvement, etc.
- Description of publicity/outreach activities

Project Objective:
Improve effectiveness and efficiency of program intake system by developing and implementing system integration functionalities that allow staff to accurately and expeditiously import intake data from the A2J online intake system into the program client database/case management system (CMS).

Strategies / Activities:
- Develop and implement system with capacities identified in Objective 1 above.
- Develop A2J online intake system-CMS integration functionalities that enables intake workers to efficiently transfer intake data from the online intake application into the client database/CMS
- Test A2J online intake system- CMS integration functionalities and make changes based on test results
- Train staff and provide on-going assistance to staff in use of system
- Develop and implement surveys or other mechanism to obtain data from program staff and managers regarding effectiveness and efficiency of the A2J online intake system-CMS integration functionalities.

Evaluation Data:
- Description and capacities of A2J online intake system-CMS system integration functionalities
- Test protocols, significant results and major changes based on test results

- Description and results of staff and manager surveys and/or other user feedback re: on-line intake system's impact on effectiveness and efficiency of intake functions
- Administrative data re: factors such as: (1) total program intakes/total intake staff (FTE) before and after system implementation; (2) average time per intake before and after system implementation; (3) accuracy of information provided via on-line applications vs. phone applications; (4) system "down-time" because of technical problems; and (5) staff time needed to maintain system.

Project Objective:

Use additional project objectives to address additional components of the project, if any. These could include online applications in Spanish, integrated chat features, and priority access policies.

Strategies / Activities:
- List Strategies/Activities for these additional components.

Evaluation Data:
- List Evaluation Data.