It is not enough merely to offer legal services. In an era of scarce resources, advocates must assure the provision of high-quality help. Introducing the QUALITY MATRIX, a new service model to help providers (and funders) get the most bang for their legal aid buck.

The American legal services community teems with diverse views, passionately held and energetically debated. On some issues, however, consensus is broad and deep. We all agree that legal aid programs exist to provide assistance to clients without the financial resources to get the legal help they need. We agree that the assistance advocates provide must be of high quality. And we agree that our clients deserve the best that our profession requires—namely, advocacy that is competent, zealous, and diligent (the obligation of every lawyer, as codified in the American Bar Association’s Model Rules and Model Code). “Legal assistance” is a misnomer if it does not meet high performance standards. Weaknesses are promptly identified and to document the legal outcome achieved when represented. HIGHLY COMPETENT STAFF. In a quality legal services program, management endeavors to hire and retain a core of experienced advocates, while less-experienced staff receive training, mentoring, and supervision by more experienced attorneys. A quality program offers support for ongoing professional development, and employee performance is regularly evaluated in light of qualitative and quantitative service goals. Weaknesses are promptly addressed so that staff members have every opportunity to meet high performance standards.

If other professions can do it, we can surely do the same. We can begin to identify indicators of quality. We can make quality an important national agenda item. And we can begin to hold ourselves accountable to the criteria and standards that emerge from our discussion, for the sake of the tens of millions of Americans who rely on us for justice.

WELCOME TO THE MATRIX
To start a conversation that will move a quality agenda, we need to unpack its possible meanings. Fortunately, there is now a large body of literature that points to a variety of indicators of quality, including some commonly accepted standards for civil legal services delivery (such as the ABA Standing Committee on Legal Aid and Indigent Defen- dants Standards and LSC Performance Criteria). Rather than trying to debate and assess whether one approach is superior to others, we have begun to think broadly about indicators that make up what we will call a “quality matrix.” We doubt that there is a single, undisputed best approach to achieving quality. Alternatively, if we hone in on quality from a number of perspectives, we may find that powerful synergies emerge that will allow staff, management, and funders to evaluate and validate quality from a broad base.

Here, then, is our first attempt to identify the core components of a “quality matrix” for legal services providers: GOOD CASE MANAGEMENT SYSTEMS. Such systems make it easy for advocates to document case activity and client contacts, to avoid administrative duplication, to keep important client information up to date, to secure client documents and funds, to move cases in a timely fashion, to document the outcomes of legal work, and to provide the reports and data required by funders. PEER REVIEW AND LEARNING. In a quality program, management endeavors to hire and retain a core of experienced advocates, while less-experienced staff receive training, mentoring, and supervision by more experienced attorneys. A quality program offers support for ongoing professional development, and employee performance is regularly evaluated in light of qualitative and quantitative service goals. Weaknesses are promptly addressed so that staff members have every opportunity to meet high performance standards.

PeER REVIEW AND LEARNING. In a quality program, systems should be instituted for peer assessment and review of casework. Managers are actively involved in case reviews using a process as a tool for developing enhanced approaches to case-handling. Training and skills development is multifaceted—and includes internal and external workshops, as well as the use of experts from other programs. A common-sense agenda ensures that all staff stay current on policy changes and developments in major areas of client service.

CONSISTENTLY STRONG OUTCOMES FOR CLIENTS. Helping our clients achieve meaningful access to the civil justice system is our ultimate goal and the reason legal services programs exist. Sometimes this involves fending off a potentially adverse situation, other times it means securing positive outcomes for our clients, and still others it means simply affording our clients an opportunity to give voice to the grievances they experience. It is not unusual for a quality legal aid program to accomplish all of these goals simultaneously. Increasingly, programs are seeking to document the impact their services have on clients’ lives; indeed, many legal services providers are doing pioneering work in this realm.

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COMMON APPROACH FOR MEASURING OUTCOMES. While efforts to document the ultimate impact of service on our clients should be encouraged, we can all do something even easier. We should embark on a common effort to document the legal outcome achieved when representation is concluded. While this will not completely identify the benefits of service, such information will offer a foundation upon which other measures can be calculated and determined. Over time, these measured outcomes, combined with other key indicators, will allow profiles of office performance to emerge in a program’s main areas of practice. This information will then be the subject of discussion, comparison, and efforts to improve. CLIENT SATISFACTION. Quality programs measure...
client satisfaction using a wide variety of tools, including inputs, surveys, focus groups, and information from secondary reporters such as community service agencies.

THE EXPANDED MATRIX

Most of the initial categories of our quality matrix are familiar and widely discussed in legal services literature. However, the inclusion of more cost-effective use of resources, a strategic workforce, and client involvement should be considered. A quality provider should provide whatever advice, referrals, or other information that may be of value.

- **CLIENT CHOICE AND INVOLVEMENT.** The 1974 statute authorizing the creation of the Legal Services Corporation has a diverse funding base, and while this diversity offers opportunities, it also requires greater coordination in order to assure the most effective use of all available resources.

- **BEST PRACTICES AND COMPARATIVE PEER REVIEW.** In our system of decentralized and highly diverse providers, great ideas and approaches to quality can be in place in one office and unknown in another. A program that pushes for high-quality needs to know what its peer programs are accomplishing and be open to adopting approaches that have proven successful elsewhere. Such exchanges of “best practices” are critically important to achieving a high-quality legal services system.

- **BREATHING LIFE INTO THE MATRIX.** Legal services providers and those who fund their work each have essential, if different, roles in ensuring quality. In a nutshell, while funders can set the framework for quality, providers make it real. In the final analysis, quality must be designed and validated at the local level. But while funder and provider roles are different, they are also interdependent. Funders provide money to legal services but are generally not involved in the day-to-day provision of assistance. They normally do not have direct control over the quality of services provided by their recipients. However, using their financial resources to support and influence advocates, funders can impact the quality question by:
  - Efficiently and effectively using resources.
  - Promoting and supporting best practices that a program has developed a good system of performance review, ask staff from that program to consult with other programs; investigating and making available to grantees information and approaches that have proven successful elsewhere; investigating and reporting to providers on the best research tools, online services, and case management systems, and whenever possible, by negotiating best prices from those vendors preferred by providers; challenging programs to integrate multiple aspects of the quality matrix into their work and evaluating provider progress on their quality agenda; documenting which components of the quality matrix are most valued by high-performing programs, and based on program-validated experience, assisting other grantees in incorporating similar approaches; assuring providers that honestly assessing and addressing weaknesses will be viewed positively and will result in support and assistance.

While the funder’s role is important, it is obvious that only providers can produce quality service. Resources, support, and frameworks for quality are essential, but without genuine support at the program level for an active, quality-focused agenda, it will be difficult to achieve broad-based program quality.

The ultimate goal is for funders and providers to work together to continually evolve and refine the quality matrix—no matter how well established the systems. Providers can influence the matrix to meet the needs of their clients. Clients are the ultimate judges of quality. Providers should be held accountable for their quality performance.

- **QUALITY CONCLUSIONS.** Achieving high quality throughout the legal services delivery system will not be easy. Obviously, in a system in which only 20 percent of our client base is served, additional resources are essential. But the case for more funding can be better made by demonstrating that we are using every dime of what is currently available in the most efficient and effective way. We must be able to demonstrate that we are acting as wisely as any corps of advocates can, and we can support their efforts. Such exchanges of “best practices” are critically important to achieving a high-quality legal services system.

- Although the past is beyond our control, we can write our future. In the years ahead—a future whose history will reflect expansion, effectiveness, efficiency, and most importantly, high quality. A future in which every client who comes to us is given the best possible opportunity to succeed. A future in which every program that we fund or provide collaboration is successfully driving higher quality. Let’s be mindful of this reality as a way to keep it from happening.

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