



Legal Aid Infrastructure & Innovation Grants Evaluation & Metrics List

March 25, 2022

Background: This informal document is a compilation of metrics, outcomes, widgets, deliverables, etc. that grantees included in their Legal Aid Infrastructure & Innovation applications. It can be used to inform evaluations and has been organized in alignment with grantee project-based groupings. Please benchmark measurement factors now in order that you can quantify improvements in benchmarked data based on grant funds.

Notes: References to “staff surveys” may also include interns, fellows, and volunteers; some redundancy exists as metrics can be applicable to more than one category. This is meant to be a growing breathing document. If you would like to recommend additions or modifications, please email Stephanie Choy at choyconsulting@gmail.com.

Updated Hardware & Enhanced Software Case Management System

- Updated Hardware and Enhanced Software
 - # of laptops, phones, etc. purchased and in use
 - Reduced consumption of paper/ink
 - Increased and faster office internet bandwidth
 - % increase in staff that can be supported by server upgrade
 - % reduction in cost per service
 - Reduced staff IT help requests
 - Staff survey on
 - Ability to access CMS and online tools in order to provide more efficient or effective client services
 - Greater reliability of hardware and software
 - Ability to work remotely
 - Employee satisfaction rate with technology upgrades
- Case Management System
 - Collection of outcome data (increase in data being collected)
 - Compare case and other legal service activity reports against old CMS data to illustrate better capturing of qualitative and quantitative data
 - # of reports available with client demographic data
 - # of incidents of bad data (i.e. duplicate, incomplete, inaccurate)
 - Time required to onboard/familiarize new users to database
 - Reduced database maintenance costs
 - Database security level achieved
 - # or % reductions in manual re-entry of client information
 - # or % staff using data in outreach planning and supervising service quality
 - # or % volunteers and pro bono attorneys utilizing the CMS

- # reports created in collaboration with legal program staff to foster efficient case management
- Staff survey on increased CMS usability and efficiency
 - Reduced # of spreadsheets or “workarounds” necessary and/or reduced time spent using spreadsheets or “workarounds”
 - Reduced time/steps spent entering data into CMS
 - Reduced reliance on paper files
 - Increased consistency of eligibility procedures
 - Quality of the “feel” of the experience”. Is it intimidating or tedious? Or is it quick and easy?
 - Ease of generating and utilizing reports
 - Access to and utility of dashboards
 - To what degree the system is meeting staff needs
 - Efficiency of attorney referral process
 - Staff time freed up to focus on other areas (e.g. attorneys can focus on legal issues, E.D. can focus on strategic planning)
 - Increased capacity to manage grants (e.g., access to appropriate resources)
 - Increased confidence in using service and outcome data to perform program evaluations and inform client service decision-making
- Usability tests administered to staff to evaluate the project’s impact on user functionality
- # or % staff trained on new systems
 - Staff reported understanding of how to use new systems
 - Increased understanding of the principles and purpose of program measurement for legal aid organizations
 - How to access and use data
- External survey
 - Survey to partners, QLSPs, and clients on the effectiveness and ease of use of new technologies following software implementation
 - For CMS that is shared across multiple providers
 - Net Promoter Score
 - Ease of adoption
 - Administrative time saved through use of the platform
 - Ability to serve more clients as a result of increased efficiency

Human Resource, Accounting, and Other Systems

- # or % of applicable staff able to perform more complex transactions (e.g., accounting)
- # of new systems installed
- Reduce time spent on internal processes (e.g., reduce end-of-the month accounting process by one day)
- Staff survey on increased systems efficiency
 - Reduced # of spreadsheets or “workarounds” necessary and/or reduced time spent using spreadsheets or “workarounds”
 - Reduced time/steps spent entering data into system(s)
 - Increased consistency of procedures (e.g., accounting, onboarding)
 - Quality of the “feel” of the experience”. Is it intimidating or tedious? Or is it quick and easy?
 - Increased efficiency due to workflows and systems, as opposed to manual communication (e.g., form approvals)

Website & Online Tools (platform, translation, document assembly, fillable forms, etc.)

- Website
 - Website is mobile friendly
 - # of website unique views

- Bounce rate
- Session (could be averages)
 - Unique pageviews per session
 - Session duration
 - Time spent on each page
- Keyword search
- Top traffic source
- Device source
- Interactions per visit
- Exit page
- Average time spent on website
- # of access improvements made to website
- # of downloads/visits (online tools)
- SEO ranking (*not sure how this is measured*)
- Staff survey on
 - Ease of updating website
 - # of instances staff able to direct clients to resources on the website in order to assist with the resolution of client's issue
- Client surveys to obtain clients' feedback after they have accessed information on the website
- Online Tools
 - # of fillable forms/letter templates produced
 - # of training/instruction videos, toolkits, or how-to guides created
 - # disseminated / downloaded / distributed
 - # and % of client files digitized (transitioned from offline to online)
 - Survey users who generate self-advocacy documents (e.g., ease, utility)
 - # or % staff able to send and receive text messages via office phone number
 - # or % staff that have access to the calling features they need to work effectively
 - # of text-based surveys created by organization and completed by clients
 - # of text messages sent and received, including response rate
 - # of former clients engaged in text follow-up
 - # of online forms that have been automated
 - # of interviews started and documents created for each new form
 - Web tool established for clients to communicate and submit documents remotely
- Translations
 - # of documents translated (e.g., fact sheet, fillable forms, client data collection forms)
 - # of videos produced in different language
 - # of website page translations
 - Accessibility standards met (e.g., ADA, WCAG)

External Database / Portal

- # of providers in database
- # of resources in database
- # of unique users who access an external database
- # of times the average user accesses the database
- # of languages available
- Legal outcomes of database user cases

Direct Services

- # individuals who receive 1:1 legal assistance
 - Attorney time freed up due to additional staff/structure (availability for more complex legal work)

- Expedited the document preparation process
- # individuals represented (Full, Limited Scope)
 - # cases opened and closed
 - Case outcomes (e.g., asylum grants, evictions prevented, compensation received, answers to UD Complaints, ROs obtained)
- # of individuals that receive brief services
 - Legal outcomes for brief services
- # of individuals that utilize self-help services
 - legal outcomes for self-help services
- # of individuals that receive extended services
- # of individuals served in hard to reach areas
- # of internal referrals for multi-unit/multi-issue cases
- # of materials created to support clients
 - # created in collaboration with partners
- # of resources distributed to clients (e.g., cell phones)
- # or % of community members with sustained participation over the course of the year regarding legal advocacy
- # of meetings, consultations, and check-ins with partner organizations
- # of comment, advocacy, and demand letters, Public Records Act filings, and other documents created on behalf of organizational partners
- # of advocacy outcomes achieved with advocacy with partners, including policy changes, funding decisions, and other actions
- # of community priorities adopted by partners as a result of advocacy efforts
- # of community members engaged in advocacy
- Clinics:
 - # individuals who attend a workshop/clinic/KYR/outreach events
 - # of workshops/clinics/KYR/outreach events held
 - Number and types of legal needs presented at clinics
 - # of tools used for scheduling (less tools as proxy for greater efficiency)
 - # of appointments scheduled,
 - % of appointments kept/missed
- Lawsuits
 - # lawsuits filed
 - # of lawsuits where organization served as co-counsel
 - Number of people impacted by case
- Client satisfaction survey
 - Quality of services
 - Trauma-informed services
 - Scheduling appointments
 - Access (e.g., physical, technology, language, hours of operation)
 - Quality and ease of referrals
 - Feel well-supported as they navigate their legal concerns
 - Whether their legal issue was resolved
 - Access to resources before and after contact with org
 - Understanding of legal remedies available to them
 - Knowledge of legal tools and protections
 - Utilization of resources received (e.g., cell phones)
 - Mental health, general health
 - Critical changes experienced to employment, housing, etc.
 - Sense of empowerment among individuals and families to successfully advocate for themselves using technology and other online platforms
 - Better educated about legal rights and responsibilities and better prepared to interact with the legal system

Communication & Client Outreach

Remote Access & Services

- Communication & Client Outreach
 - # outreach or informational materials distributed
 - # of requests submitted via website for information or support
 - # of clients connected through new outreach methods
 - # of people who called hotline
 - Of those, how many received service? Referral?
 - # of survey respondents (e.g., seniors)
 - % increase of people who are aware of legal services (e.g., older adults) per surveys
 - # of potential clients and supporters reached through social media
 - # of existing supporters reached through e-newsletter
 - Community outreach plan developed
 - Annual Report developed
- Remote Access & Services
 - # of participants from rural communities, people with mobility obstacles, people without internet services, and people who are unable to travel to meetings for a variety of reasons
 - # of laptops, phones, etc. purchased and in use
 - Staff survey on:
 - ability to be more responsive to inquiries via electronic communications or telephone, and
 - meeting and training requests regardless of their location
 - Ability to work remotely
 - Off-site (rural) connectivity
 - Capacity to lead and support hybrid approaches to meetings and advocacy

Intake

- # of potential clients screened / intakes conducted
- # of clients accessing remote intake services
- Launch text and social-media-based intake processes
- # of intakes processed through text/social media
- # of new languages available for intake
- Staff survey on increased intake efficiency
 - Reduced # steps required to complete client intake
 - Reduced # of spreadsheets or “workarounds” necessary and/or reduced time spent using spreadsheets or “workarounds”
 - Increased consistency of eligibility procedures
 - Quality of the “feel” of the experience”. Is it intimidating or tedious? Or is it quick and easy?

Pro Bono

- # pro bono resources developed/updated
- # of pro bono attorneys trained
- # of clinics attended by pro bono attorneys (repeat volunteers?)
- # hours contributed by pro bono attorneys
- # or % increase in pro bono participation
- Increased rate of remote case placement
- Market value of pro bono services

- Standardize pro bono clinic processes (improved services, efficiency, volunteer experience, consistency, etc.)
- Pro Bono recruitment plan developed
- Pro Bono training plan developed
- Survey of volunteers / Pro Bono attorneys
 - Training program
 - Level of satisfaction of pro bono volunteers at clinics
 - Improved efficiency of time and reduced quantity of procedural steps between pro bono registration, screening, and placement, and satisfaction level of users

Staff Retention: Leadership Development, Diversity Equity and Inclusion

- # of minority population (e.g., disabled people, people of color) recruited to become key employees and members of leadership team
 - # hired
- # of minority law student organizations and law school admissions officers contacted for pipeline development partnerships
- # or % of staff retained (with focus on BIPOC); reduced attrition rate
- # of job descriptions that have been updated
- Shared professional development plan template created and utilized by supervisors/staff collaboratively
- Paths for advancement are clearly defined and articulated to staff
- Staff survey on:
 - Job satisfaction
 - Health and wellbeing
 - Growth opportunities
 - Morale

Legal Aid Statewide Capacity

- # of training materials produced (e.g., video, toolkit)
 - # video views, toolkit downloads, etc.
- # of partner legal service organizations who report utilizing materials
- # of trainings held for providers/organizations
- # individuals who attend a workshop/training
- # of organizations represented at a workshop/training
- # of attorneys who reach out for guidance on a legal issue area
 - # or % that receive guidance
- # or % of participating organizations that begin providing relevant legal assistance after having attended training
- Evaluation Forms: Providers / QLSPs (e.g., quality and utility of training and/or resources provided)
- # of technical assistance interactions provided (e.g., meeting, phone, email)

General & Administrative

- General
 - Comparisons to previous years
 - Client demographics
 - Geographic location of services
 - # of new staff hired
- Administrative
 - Succession plan developed
 - Needs assessment conducted (e.g., client services, technology)
 - Policies that have been created/updated
 - Manual created

- Staff trainings held (on new procedures, software, etc.)
- Workflows created (reducing manual procedures, if possible including estimated efficiencies gained)
- New office established (note if in rural location)
- Marketing templates developed

Anecdotal / Narrative

- **Administrative**
 - Strengthened internal controls
 - Accounting system upgrade results in streamlined accounting processes, improved financial reporting, and improved grant budget development and tracking.
 - Analyze how the improved accounting system impacts grant management, financial reporting, and strategic financial planning
 - Securely develop and store client files and pleadings
 - Ability to pursue and secure new sources
 - Ability to take on new programs knowing that the infrastructure is in place
- **Client Needs**
 - Better client services based on readily accessible information (e.g., clients' sense of safety, housing stability, unmet needs)
 - What types of legal or employment-related issues clients are most seeking support for
 - Long-term impact on clients' overall wellness, economic security, family connections, and self-confidence
- **Collaboration**
 - Increased collaboration with rural communities
 - Increased collaboration among nonprofits and legal services providers
 - Increased collaboration between leaders within and among rural communities and neighborhoods
 - Collaborate with stakeholders to develop meaningful public policy campaigns
 - Enhanced relations with community partners
- **Communications**
 - Improvements to pre-event outreach and pre-screening capacity
 - Improved communications between units as more multi-unit/multi-issue cases are taken on
- **Data**
 - Benefits of standardized data reports
 - Past data migrated to new systems
 - Effective use of data to track trends, analyze equity in services, and to respond to client needs
 - Analyze how improved data tracking in the case management system supports equity in services and organizational involvement in advocacy efforts
 - Increased data-informed decision-making capacity
 - Data on awareness of legal services and access barriers (baseline data for program development and evaluating the impact of interventions)
 - Improve online application data transfer
 - Modify systems to better collect and analyze data
- **Efficiency**
 - Reduced manual process or duplication
 - Reduced administrative staff burdens
 - Reduced time spent creating workaround solutions for data management and scheduling
 - More efficient operational workflows and their benefits

- Efficiencies enabling staff to focus on other important issues
- Benefits of streamlining case assignment
- Greater consistency across forms
- Feedback / Stakeholder Engagement
 - Viewer feedback in the form of comments and direct messages via social media platforms where the videos are hosted
 - Qualitative data from community leaders
 - Quality of the data in Legal Server. How useful is it? Why? Why not?
 - Examples of people with lived experience informing process, materials, training, policy, case strategy, etc.
 - Community priorities inform organization's advocacy strategy
- Professional Development
 - Employee growth; increased employee capacity/knowledge/skills
 - Trained individuals who move into supervisory roles over time
- Technology & Security
 - How staff used new tech (e.g., iPads, cell phones), whether they realized the projected or unforeseen benefits, and ideas for expanding the use of the technology
 - Increased website security
 - Ability for staff to work securely from office, home, or other locations