

**Using Data to Better Meet the Needs of Clients and to
Inform Strategic Resource Allocation Decisions**

Organization: Legal Aid Society of Cleveland

Category: Using Data

Problem/Challenge/Need: To better serve our clients and to allocate our limited resources in a way that maximizes the benefit we provide within our client community

Innovation Description: The Legal Aid Society of Cleveland (“Cleveland Legal Aid”) uses internal client and case data and external regional socioeconomic data to better serve our clients and to allocate our limited resources in a way that maximizes the benefit we provide within our client community. We analyze case and regional trends and depict the results in compelling, easy-to-understand visuals for our staff, Board, funders, and partner organizations. We analyze and share data to celebrate successful client service and to encourage increased effectiveness, to inspire our advocacy efforts and focus our resource allocation decisions on the greatest needs, and to encourage increased outside funding support for our work.

Result: Data analysis is an emerging strategy in support of our commitment to providing efficient and effective services. As an example, data reports helped us identify unmet needs among the Spanish-speaking community, which led to the hiring of bilingual staff, increased use of interpreters and translated materials, and new outreach efforts among the Spanish-speaking community. These efforts resulted in a 20% increase in the proportion of Spanish-speaking clients served. In a similar manner, our Elder Law Task Force has reviewed intake volume and regional demographic trend data reports to ensure that the clients we are serving are representative of our regional poverty population. In addition, our practice groups are using outcome data analyses and reports to gauge the effectiveness of specific legal strategies. Finally, data reports have helped us measure our progress toward achieving our existing strategic goals and will help us set our future strategic goals.

As our use of data analyses and reports grows, we will continue to find ways to use what we learn to better meet the needs of our clients.

Materials available: List of data analyses projects and Presentation

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Using Data to Better Meet the Needs of Clients and to Inform Strategic Resource Allocation Decisions

The Legal Aid Society of Cleveland

October 2011

The Legal Aid Society of Cleveland (“Cleveland Legal Aid”) uses internal client and case data and external regional socioeconomic data to better serve our clients and to allocate our limited resources in a way that maximizes the benefit we provide within our client community. We analyze case and regional trends and depict the results in compelling, easy-to-understand visuals for our staff, Board, funders, and partner organizations. We analyze and share data to celebrate successful client service and to encourage increased effectiveness, to inspire our advocacy efforts and focus our resource allocation decisions on the greatest needs, and to encourage increased outside funding support for our work.

Cleveland Legal Aid’s data analyses projects include:

- Tracking progress toward achieving our strategic goals.
 - Falling below a target goal might prompt a slight change in a strategy for certain types of cases or client communications.
- Measuring intake and case volume and associated legal problems.
 - Understanding changing trends and links between challenges faced by low-income people and the legal problems they bring to us.
- Tracking the levels of legal services we provide.
 - Understanding the levels of service required by specific legal problems and further understanding how to most effectively help the highest number of clients.
- Identifying trends in the cases and clients we cannot serve.
 - Ensuring that there are no unexplainable concentrations of clients or case types we are unable to serve.
- Analyzing client demographic trends in comparison to regional demographic trends for low-income people.
 - Ensuring that our client population is representative of our regional poverty population and that we are not missing any particular groups of low-income people.
- Gauging legal problem-specific case outcomes and financial outcomes.
 - Reviewing case outcome measures to know whether we are achieving desired results for our clients.
- Tracking client survey feedback regarding the effectiveness of our services.
 - Using direct client feedback to improve accessibility of our services and communications.
- Forming partnerships with organizations that have their own robust data regarding low-income people.
 - Our long-term plan is to share data with these organizations in such a way that will allow for causal and predictive analyses that can inform decisions about our legal services.

Cleveland Legal Aid continues to implement new ways to gather, analyze, and depict data in support of our commitment to maximizing the positive impact of our work.



The

Legal Aid Society

of Cleveland

Since 1905

Using Data to Better Meet the Needs of
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Resource Allocation

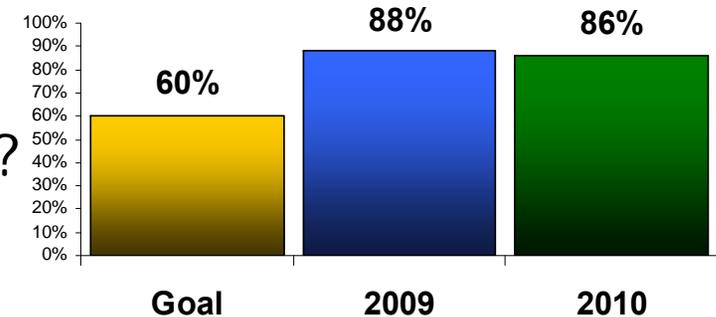
Data Collection and Analysis

1. Tracking progress toward strategic goals
2. Measuring volume of legal problems and levels of services provided
3. Analyzing client and regional demographics
4. Identifying unmet needs
5. Gauging case outcomes
6. Tracking client survey feedback

1. Tracking Progress Toward Strategic Plan Goals - Example

Strategic Plan Goal: 60% Survivors of Domestic Violence & Abuse are safer:

- Affirmative answers to:
 - Secured/retained safety for client?
 - Eliminated/reduced risk to child?
 - Secured order of protection?
 - Secured safety for DV, crime or human trafficking survivor?
 - Avoided deportation?
 - Improved access for people with disabilities?

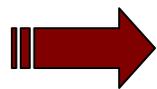
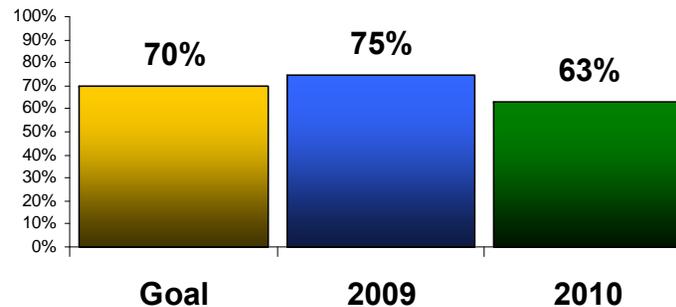


Result: Met goal in 2009 and 2010. Continue measuring.

1. Tracking Progress Toward Strategic Plan Goals - Example

Strategic Plan Goal: Assets will increase for 70% of clients

- Clients for whom asset value increased:

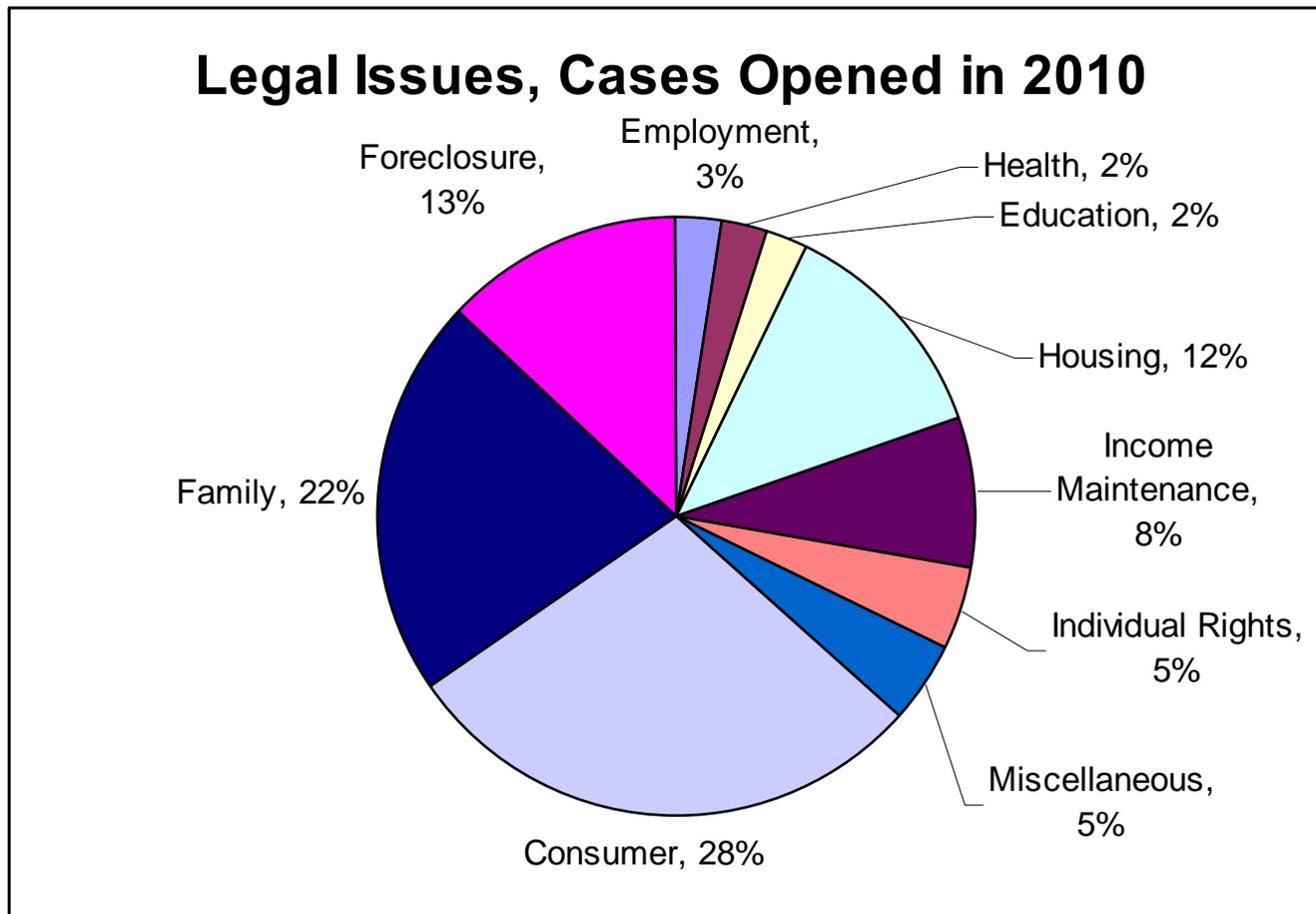


Result: Did not meet goal in 2010. Further analysis required to determine reason and to identify strategies to meet goal moving forward.

2. Legal Problems: Trends in Intake Volume

Top Legal Problem Intakes:	Δ 2008 to 2009	Δ 2009 to 2010	Overall Δ 2008 to 2010	
01-Bankruptcy/Debtor Relief	28%	0%	27%	Green font = increase in # of intakes for legal problem
32-Divorce/Separ./Annul.	0%	20%	19%	
67-Mortgage Foreclosure	110%	-22%	64%	
63-Private Landlord/Tenant	-8%	8%	0%	
31-Custody/Visitation	12%	25%	39%	Red font = decrease in # of intakes for legal problem
61-Fed. Sub. Housing	-23%	18%	-9%	
37-Domestic Abuse	19%	4%	23%	
03-Contracts/Warranties	-29%	-12%	-38%	
89-Other Individual Rights	6%	15%	21%	
76-Unemployment Comp.	62%	-6%	51%	
38-Support	67%	81%	203%	
95-Wills and Estates	-16%	-5%	-20%	
81-Immigration/Natural.	115%	32%	184%	
07-Public Utilities	59%	-24%	21%	
62-Homeownership (Not FCL)	14%	-21%	-10%	
51-Medicaid	-11%	-9%	-19%	
94-Torts	-24%	42%	8%	
75-SSI	2%	-2%	0%	
64-Public Housing	12%	-19%	-10%	

2. Legal Problems: Matching Legal Needs and Legal Services



2. Levels of Service: Percentage Served

Percentage Served	2008	2009	2010	2011 YTD	Average 2008- 2011YTD
01-Bankruptcy/Debtor Relief	77%	78%	82%	87%	81%
51-Medicaid	71%	71%	74%	70%	71%
67-Mortgage Foreclosure	67%	73%	73%	68%	70%
37-Domestic Abuse	65%	66%	67%	80%	70%
75-SSI	71%	57%	53%	75%	64%
64-Public Housing	60%	54%	61%	78%	63%
76-Unemployment Comp.	62%	60%	65%	57%	61%
61-Fed. Sub. Housing	53%	52%	62%	68%	59%
95-Wills and Estates	56%	55%	37%	50%	49%
81-Immigration/Natural.	56%	29%	49%	60%	49%
07-Public Utilities	60%	36%	37%	55%	47%
38-Support	38%	37%	39%	41%	39%
89-Other Individual Rights	26%	33%	29%	58%	36%
32-Divorce/Separ./Annul.	32%	32%	28%	34%	32%
03-Contracts/Warranties	33%	26%	24%	27%	27%
62-Homeownership (Not FCL)	31%	30%	25%	22%	27%
31-Custody/Visitation	30%	25%	20%	19%	23%
63-Private Landlord/Tenant	25%	20%	21%	22%	22%
94-Torts	23%	23%	24%	12%	21%

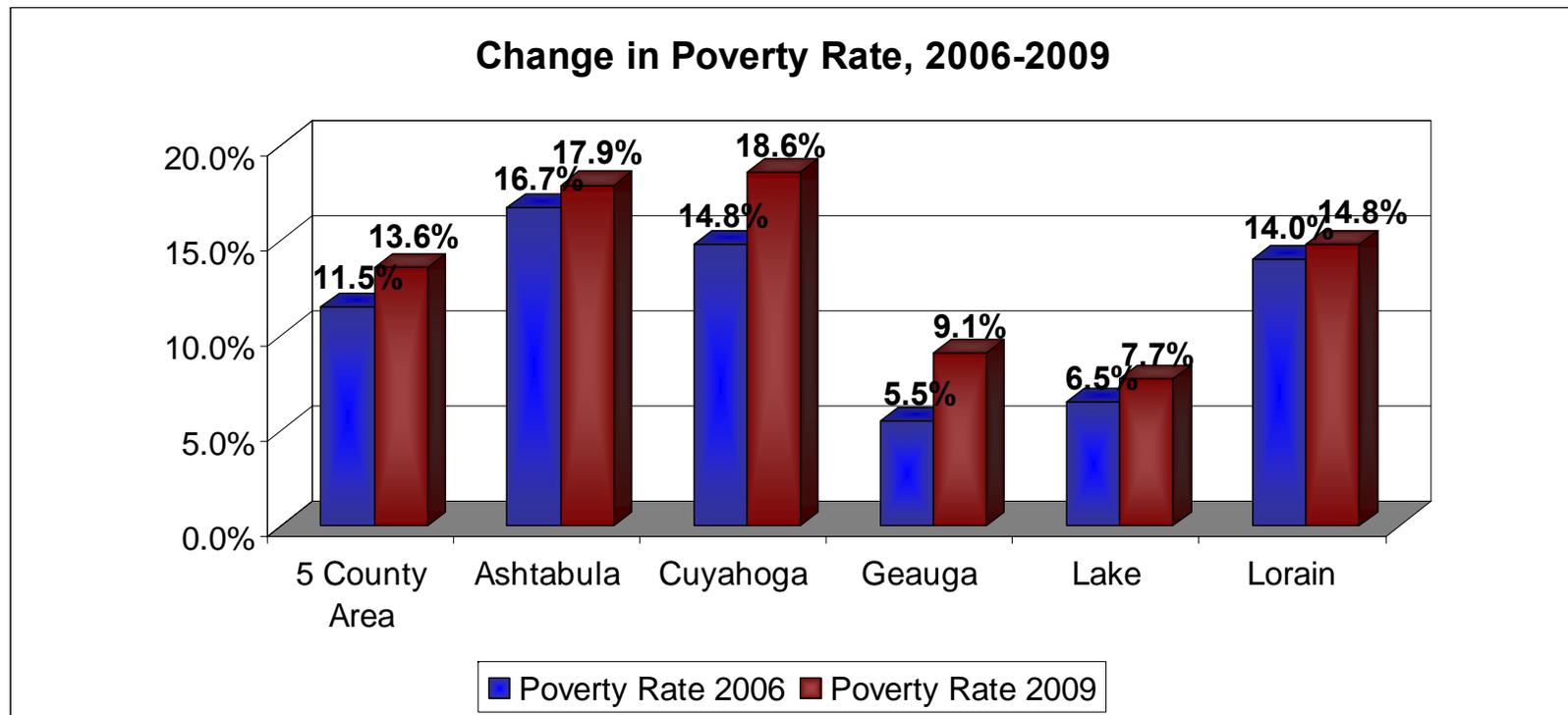
3. Demographics: Client Trends

Closed Cases: Age			
	2008	2009	2010
Under 18	0.7%	0.2%	0.8%
18-59	81.8%	83.3%	85.7%
60+	17.5%	16.5%	13.4%

Closed Cases: Gender			
	2008	2009	2010
Male	27%	31%	32%
Female	73%	69%	68%

Closed Cases: Ethnicity			
	2008	2009	2010
Black	52%	51%	54%
White	37%	39%	36%
Hispanic	8%	8%	8%
Other	8 3%	3%	3%

3. Demographics: Regional Trends



Source: American Community Survey, 1-year estimates, 2006 & 2009

3. Demographics: Client Trends Compared to Regional Trends

- **Noticed client data trend:** 50% more intakes overall, but proportionally fewer intakes for seniors => WHY?
- **Investigated regional data trends:** Senior population is larger in number, but fewer seniors are in poverty.

➡ **Conclusion:** Our client data matches regional trends. ↓ % seniors in poverty => ↓ requests for legal services from seniors.

4. Identifying Unmet Needs – Poverty Dispersion Example

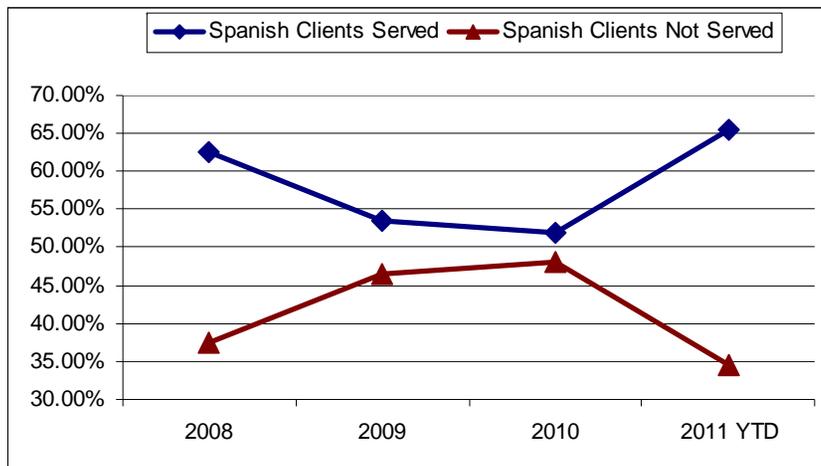
- **Trend** = ↑ poverty in suburban and rural areas
- **Evidence of Unmet Need:**
 - Increasing intakes from suburban and rural counties
 - Flat case volume and lower % served than in urban areas
- **Response** = Integration plan => all staff available to all clients throughout service area

➡ **Results, 2010 to 2011:**

- 20% ↑ cases opened in suburban and rural areas
- 10% ↑ in intakes served in suburban and rural areas

4. Identifying Unmet Needs – Ethnicity & Language Example

- **Trend** = ↑ Hispanic and Spanish-speaking population
- **Evidence of Unmet Need:**
 - Regional demographic evidence of non-English speakers in poverty
 - Increasing intakes from Hispanic and Spanish-speaking people
 - Lower % served because of language barriers
- **Response** = Hired bi-lingual staff, translated materials, engaged translators, conducted outreach efforts



 **Result:** We now consistently serve 50-65% of Hispanic and Spanish-speaking clients, higher than our overall service rate

5. Gauging Case Outcomes

2010 Sample Results:

- Reduced/avoided debt (consumer cases): 98%
- Preserved assets (consumer cases): 86%
- Removed barriers to education (education cases): 98%
- Secured/retained safety for client (family cases): 95%
- Secured/retained child support (family cases): 92%
- Foreclosure prevented and home saved (foreclosure cases): 68%
- Increased income (income maintenance cases): 64%

5. Gauging Case Outcomes

2010 Sample Results (continued):

- Increased medical coverage (health cases): 83%
- Prevented eviction (housing cases): 97%
- Obtained participation in subsidized housing (housing cases): 95%
- Sample Financial Outcomes (all case types combined):
 - Income increased for 66% of our clients after receiving our services.
 - Income increased by 40% for our clients.
 - Asset values increased for 63% of our clients after receiving our services.

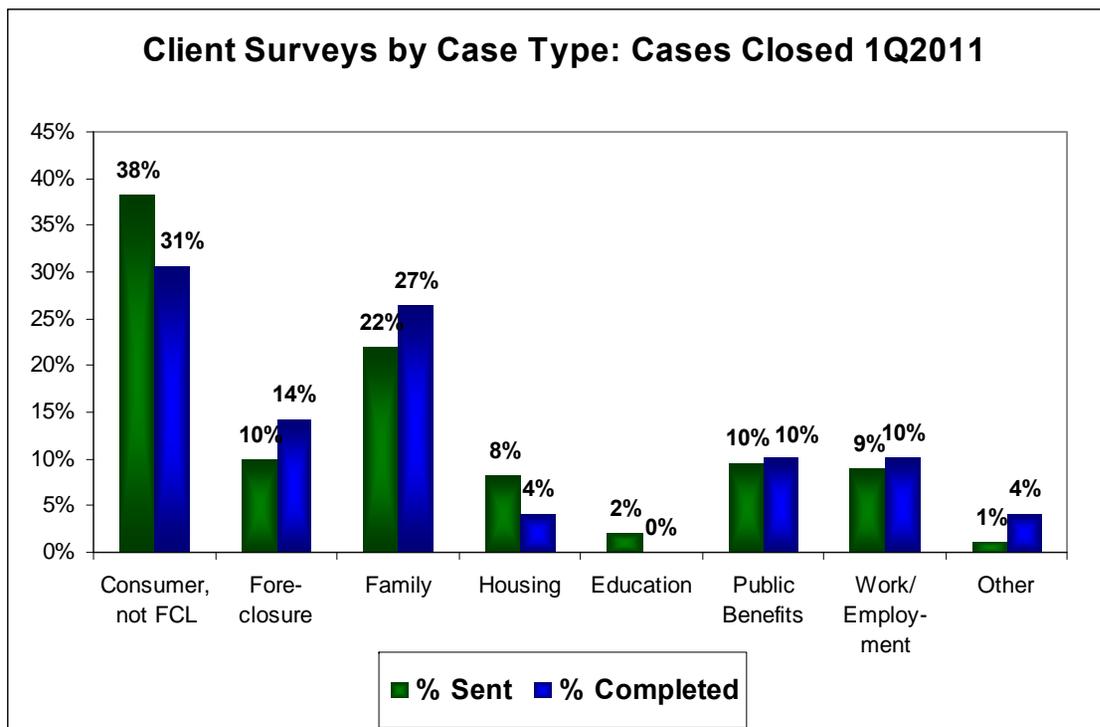
5. Using Outcome Data to Increase Our Effectiveness

- Education Practice Example
 - Old outcome measure:
 - Are we removing barriers to education?
 - New outcome measures:
 - Prevented expulsion?
 - Enabled child to enroll in school?
 - Obtained bilingual services for child?
 - Obtained educational disability identification?
 - Prevailed at MDR?
 - And 10 other outcome measures...

➔ More outcome measures that are more comprehensive and can be used to measure effectiveness of legal services provided.

6. Client Survey Example: 1st Quarter 2011 Results

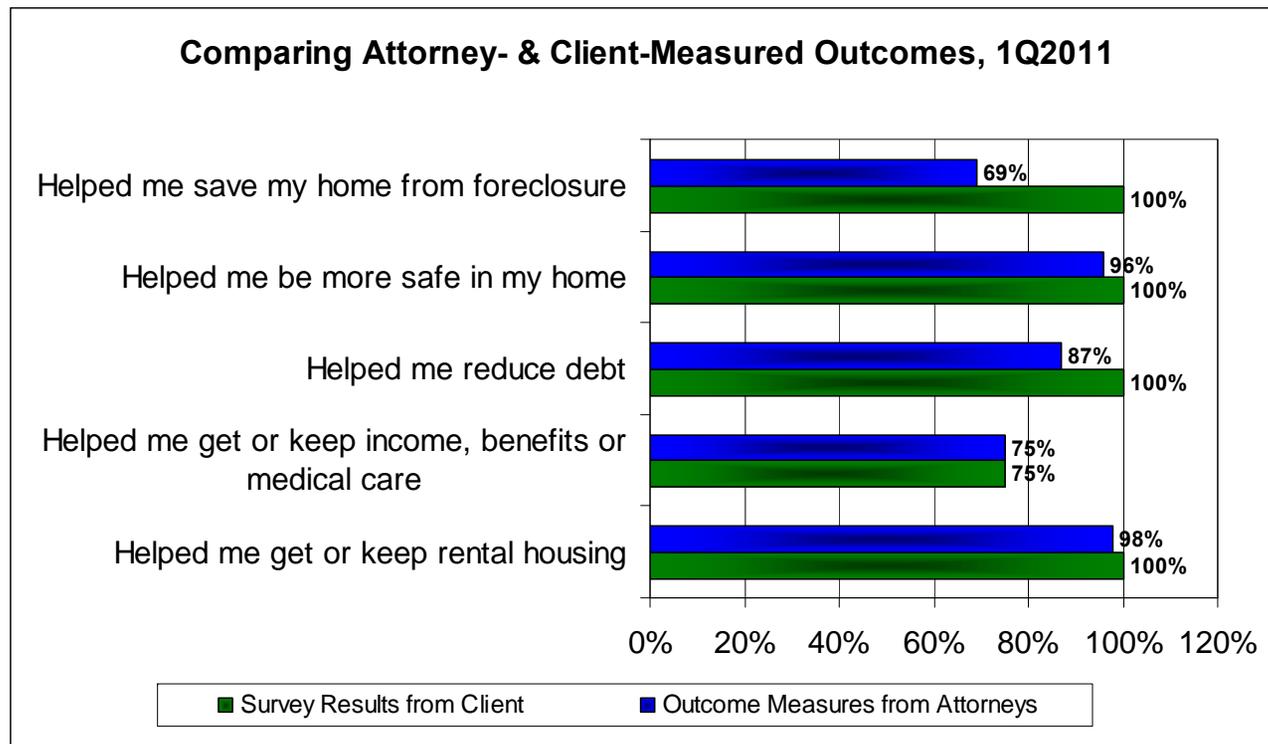
- Sample results:
 - 23% rate of return from clients receiving extended service; 12% from clients receiving brief service
 - 82% of all respondents indicated that Legal Aid helped them



- 83% of brief service clients reported the Legal Aid helped them understand their rights
- 93% of extended service clients reported that they were able to follow our advice

6. Client Survey Example: Comparing Outcomes

- Survey questions for clients with closed extended service cases mirror outcome measures completed by attorneys => Are the results similar? **Yes.** Client survey results were equal to or better than attorney outcome measures in 1Q2011.



Note: These results are from our first round of client surveys for 1Q2011. The sample size is small. We continue to gather additional survey results every quarter.

Private Bar Email Campaign with Generation-Specific Messages

Organization: Legal Aid of Northwest Texas

Category: Fundraising

Problem/Challenge/Need: Our objective is to improve the performance of our private bar campaign. How do we reach more, and get a better response, without spending a lot of money? From 1997 to 2008 we sent three direct mail pieces annually – first to all 15,000 licensed attorneys in our area, then just to the 10,000 members of the Dallas Bar, at a cost of approximately \$20,000 to \$25,000. Response? One percent, bringing in about \$50,000 to \$80,000. In 2009 we started mailing previous donors (approx 1,200) and e-mailing the Dallas Bar membership. Dollars and response were about the same.

Innovation Description: Why do people give? Because someone they cannot or do not want to say no to asks them, or, because they were somehow touched emotionally. Assuming we do not have a person they can't say no to, what and how do we communicate so as to reach them emotionally? To improve performance – what can we say or how do we say it?

Two years ago the MIE fundraising conference had in-depth presentations on generational focus – what to say, what different generations hear, what they respond to, etc. We decided to try segmenting the 10,000-member list into generations. This was easy to do because the Bar has birthdates and/or law school graduation years.

We decided to run a test program to see if focus on four distinct generational messaging would be any more effective than sending the same message to everyone.

- The Greatest Generation, also known as the G.I. Generation, is the generation that includes the veterans who fought in World War II. They were born from around 1901 to 1924, coming of age during the Great Depression. The Silent Generation born 1925 to 1945 is the generation that includes those who were too young to join the service during World War II. Many had fathers who served in World War I. Generally recognized as the children of the Great Depression, this event during their formative years had a profound impact on them. These two generations are treated as one for e-mail purposes.
- The Baby Boom Generation is the generation that was born following World War II, from 1946 up to 1964 - Law School – 1980 and before. One of the features of Boomers was that they tended to think of themselves as a special generation, very different from those that had come before them.
- Generation X (also known as the 13th Generation and the Baby Busters) is the generation generally defined as those born from 1965 to 1979, Law School – 1981 to 2004. They were the original latchkey kids and will be the first generation not better off than the previous one. They are also referred to as the entertainment culture.
- Generation Y was born between 1980 and 2000, Law School – 2005 to present. They are larger than the Baby Boom with 100 million. They are the most diverse, educated, medicated, cared for, and marketed to of any generation. They have the largest group of non-whites, understand violence personally, and the most technologically adept.

2011 Innovations in Civil Legal Services

Result: Comparing responses to non-generational e-mail vs. generational e-mail, this year's generational e-mail responses averaged \$292.50 each. Last year's non generational e-mail averaged \$178.25 each. In both cases, \$1,000 and over previous donors were not counted. With those \$1,000 + donors, this year's response was an average of \$515.38 as opposed to last year's average response of \$493.33.

As any experienced fundraising professional will tell you, the key to any successful private fundraising effort is getting your message heard under favorable circumstances. The most favorable circumstances include using words that are most effectively heard by your prospective donor. Since every person hears and sees the same thing differently, depending on their personal experiences, using an approach that includes allowance for the different messaging of each generation makes the most sense when included in a much larger effort. In this way, at least you have a chance that those among your prospective donor population who are most susceptible to a message targeting their generation will hear your message.

Materials available: E-mails

Contact Information: Director of Development Sam Prince, princes@lanwt.org, 817-339-5334

Sam Prince

From: Dallas Bar Association [ahernandez@dallasbar.org]
Sent: Friday, September 30, 2011 9:31 AM
To: Sam Prince
Subject: The Dallas Volunteer Attorney Program - Seeking Justice, Changing Lives

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DVAP

Dallas Volunteer Attorney Program



A Joint Program of the Dallas Bar Association & Legal Aid of NorthWest Texas



Pro Bono Lend-A-Lawyer
John O'Connor
Weil, Gotshal & Manges LLP

John O'Connor makes a difference in the lives of dozens of DVAP clients every week through his full-time service to the program. Weil, Gotshal & Manges LLP, John's law firm, has loaned him to the Dallas Volunteer Attorney Program through its Lend-A-Lawyer Program. Since the firm launched the program in 2002, it has donated a full-time associate to DVAP for three months every year.

Seeking Justice, Changing Lives. **Please Help.**

To qualify for legal aid, a family of four must not earn more than \$27,938 per year. Hiring an attorney is a luxury these families cannot afford. Without legal help, these families oftentimes fall victim to domestic violence, consumer fraud, and housing disputes. Please help.

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Individual donations of \$1,000 and above and firm donations of \$5,000 and above will be listed in a Dallas Morning News ad the week of December 19, 2011. Make your pledge by December 14 to participate in the ad.

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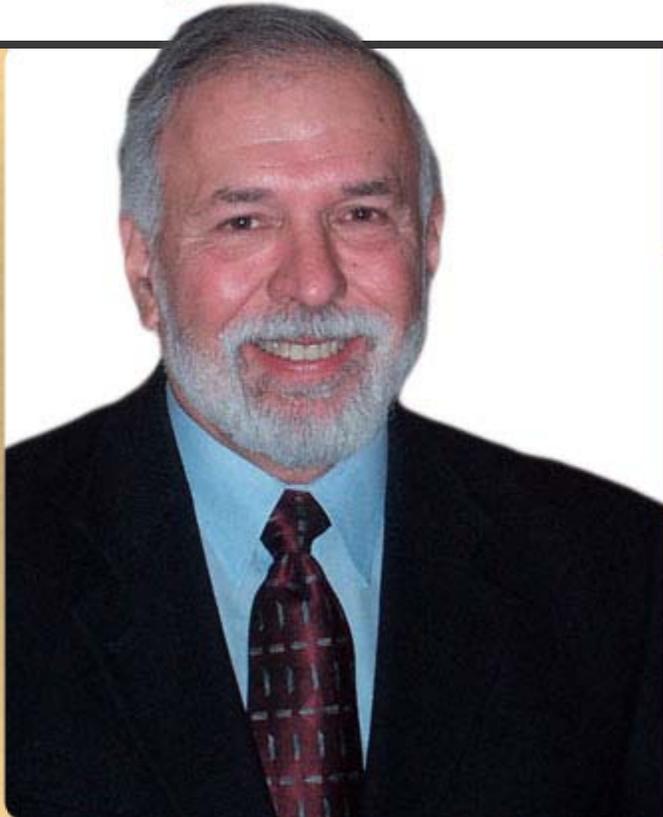
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A Joint Program of the Dallas Bar Association & Legal Aid of North West Texas



Serving Our Veterans
Michael Linz
Linz & Chandler, P.C.

Michael Linz, a long-time pro bono volunteer, has provided countless hours of pro bono service to clients for over 20 years. He now also serves those who have proudly served our country – our veterans. He helps protect the consumer rights of those people who have bravely protected the lives and liberties of all Americans.

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Pro Bono Problem Solver
Nicola Shiels

Patton Boggs LLP

Nicola Shiels has been serving the poor since 2002 doing what only attorneys can do – using their legal talents to resolve clients' problems. Whether helping people with a divorce, adoption, or will or enforcing their consumer rights under Texas law, Nicola's assistance has improved the lives of dozens of people through her pro bono work.

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Dallas Volunteer Attorney Program



A Joint Program of the Dallas Bar Association & Legal Aid of NorthWest Texas



Pro Bono Leader
Pamela St. John
AT&T Legal Department

Pamela St. John serves as the DVAP Pro Bono Coordinator for the AT&T Legal Department. Through her leadership, the attorneys of AT&T are making a difference in the lives of low-income clients in Dallas by providing them with the legal help they desperately need.

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