

Evaluation: How Intake Impacts Client Service – A Case Study

Katherine Bladow

Technology Project Coordinator

Montana Legal Services Association

(406) 431-5597



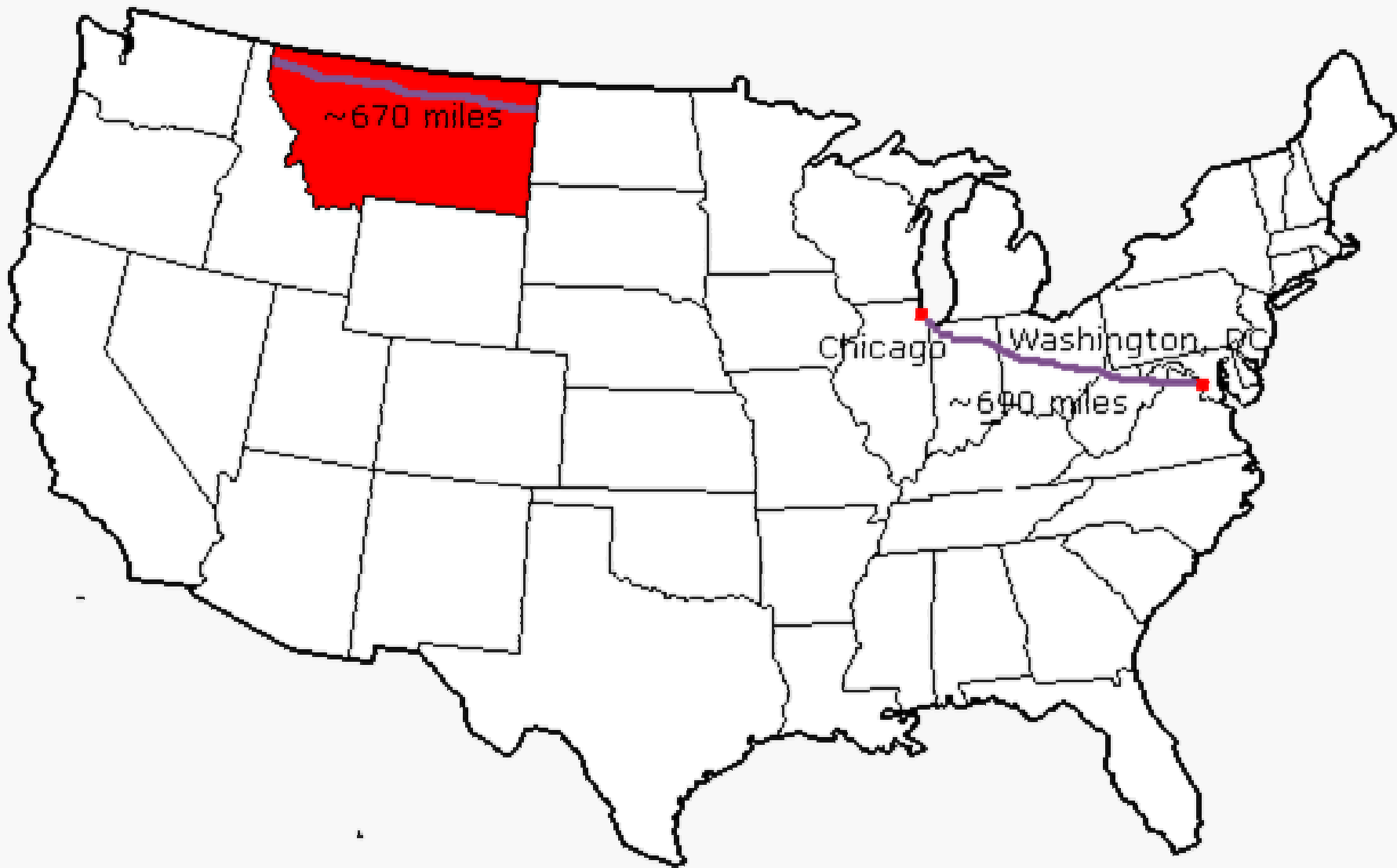
Project Goals

- Manage cases in a more efficient and unified manner.
- Improve efficiency of data reporting.
- Improve communications and increase staff connectivity.
- Increase pro bono participation.



Challenges

- Geographic Size of Montana
- Staff Attitudes
- Software Limitations
- Availability of Technology Resources



~670 miles

Chicago Washington, DC

~690 miles



Challenges

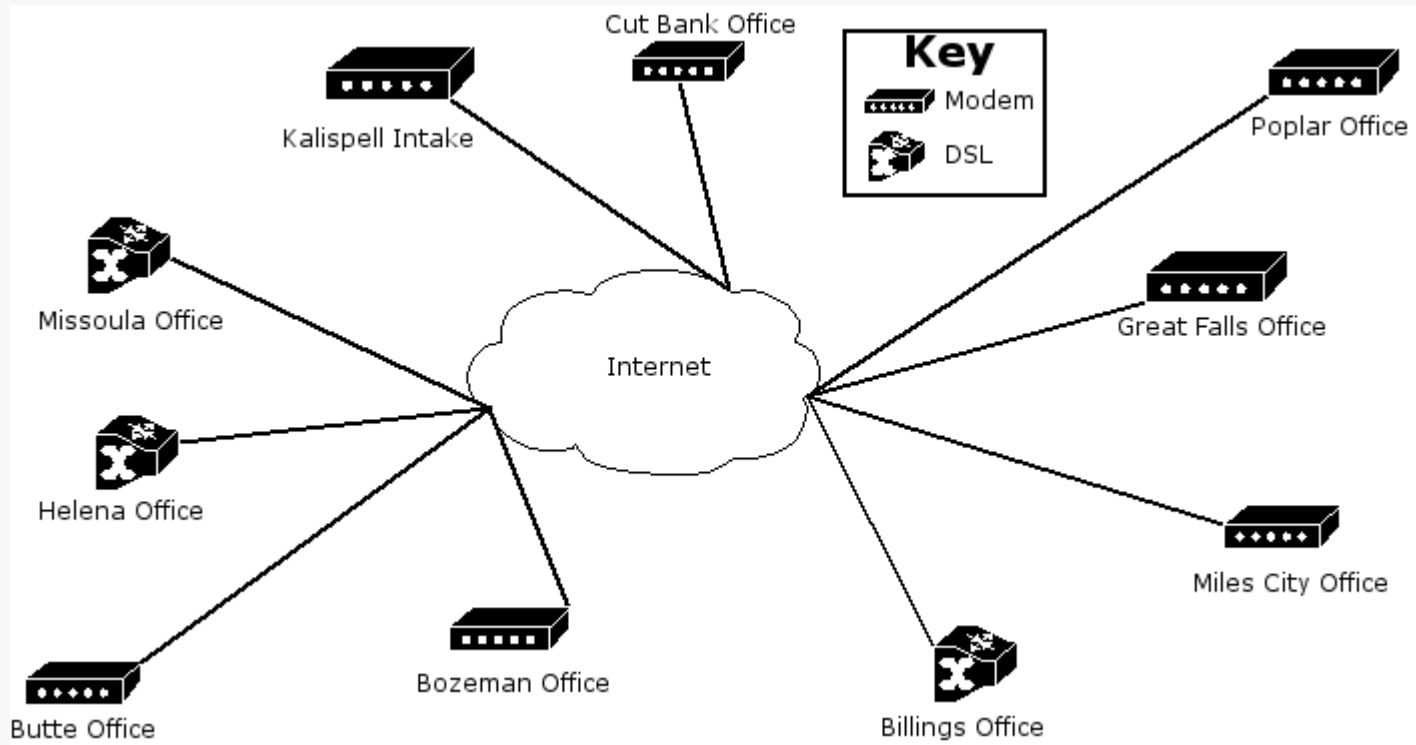
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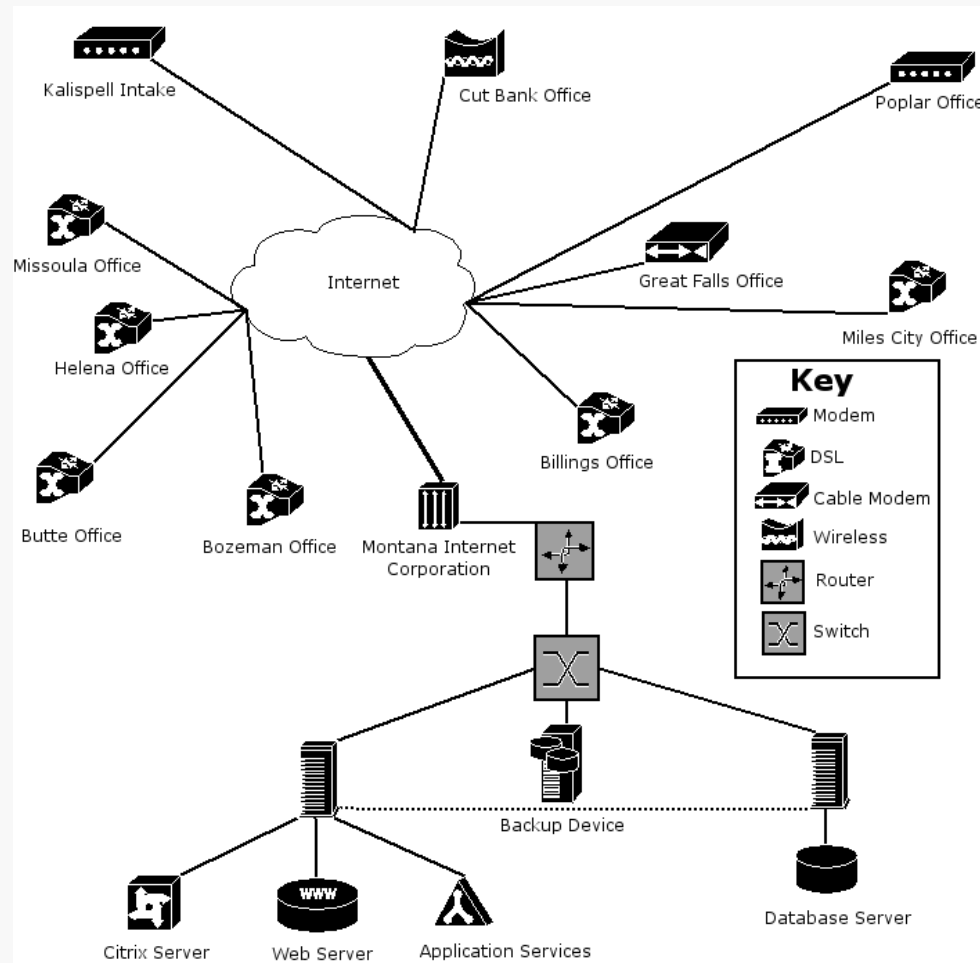
Major Accomplishments

- Implemented centralized case management system in seven months.
- Cost was significantly less than if a consultant had been hired.

MLSA went from this . . .

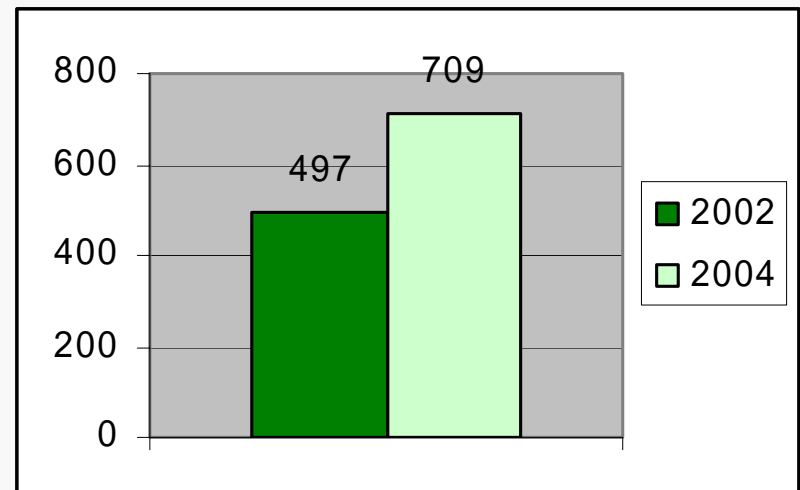


To this . . .




MLSA staff manage cases in a more efficient and unified manner.

- Each intake worker handled 43% more intakes.




Number of Intakes Processed
by Each Intake Worker



MLSA staff collect information for data reporting more efficiently.

Administrative Officer said that

- Before the centralized case management system, the Case Disclosure Report took **an entire day**.
- After the centralized case management system, the Case Disclosure Report took **approximately one hour**.



MLSA staff communicate better and are more connected.

- Subject matter case staffings in addition to office staffings.
- Staff are more comfortable asking for help.
- HelpLine regularly communicates with every office because statewide intake is possible and efficient.



How did we evaluate the implementation?

- Created evaluation plan.
- Surveyed staff opinion.
- Pulled numbers from case management system.
- Interviewed staff.
- Analyzed data.
- Wrote report.

Evaluation Plan

Project Goals	Strategies/Activities to Achieve Goals	Evaluation Questions	Evaluation Data
<p>Improve client access to legal services in Montana through centralization of client database, allowing MLSA to:</p> <ul style="list-style-type: none"> oManage cases in a more efficient and unified manner. oImprove efficiency of data reporting. oImprove communications and increase staff connectivity. 	<ul style="list-style-type: none"> Research CMS options. Assemble committee to review options. Identify appropriate CMS for MLSA. Develop plan for CMS design and implementation. Combine all data into new CMS. Test new CMS. Implement new CMS. Develop user manual. Train staff. 	<ul style="list-style-type: none"> How well does the CMS perform functions? To what extent has the CMS increased ease and reliability of access to client information? Is it easy for staff to open a case in the CMS? How has the CMS increased access to accurate client information? Are conflict checks performed more efficiently on a statewide basis? 	<ul style="list-style-type: none"> Results of CMS survey and MLSA needs. Results of pre testing CMS options. Results of pre testing data conversion. Assessments of staff satisfaction and usability. Assessment of access from remote locations. Survey of staff. CMS data.



Staff Survey

- Rate the efficiency and usability of PRIME for intakes.
- Do you feel that you have received adequate training?
- Rate the efficiency and usability of PRIME for the following functions:
 - Timekeeping
 - Reports
 - Conflict checking
 - Looking up client information
 - Referrals to pro bono attorneys
- Are there any other functions or activities that you use PRIME to perform?
- How well do the above functions perform?
- What improvements and/or additional features would you like to see in PRIME?
- What additional training would you like to improve your use of PRIME?



Case Management System Data

- Number of intakes
- Number of rejected intakes
- Number of accepted intakes
- Error rates



Staff Interviews

- Administrative Officer
- Hotline Manager



Analysis



Report

- **Project Goals** (maximum 1 page)
- **Major Accomplishments** (maximum 2 pages)
- **Factors affecting project accomplishments** (maximum 2 pages)
- **Strategies to address major challenges** (maximum 2 pages)
- **Assessment of system or approach developed through the project** (maximum 4 pages)
- **Major lessons and recommendations** (maximum 3 pages)



Questions?



Evaluation Questions

Bristow Hardin

hardinb@lsc.gov

(202) 295-1553

LSC OPP Evaluation Web Site

<http://www.lscopp.com/Techsite/SitePages/Evaluation.htm>



Contact Information

Kate Bladow

Montana Legal Services Association

616 Helena Avenue, Suite 100

Helena, MT 59601

kbladow@mtlsa.org

(406) 431-5597