

## **PRIORITIES COMMITTEE REPORT**

Issued 3/28/02

Priorities Committee Members: Larry Daves (L), Steve Flynn (CS), Elizabeth Moulton (B), Linda Olson (D; coordinator), Manuel Ramos (D; ex officio), Roberto Silva (P), Reenie Terjak (G; coordinator), Alberto Torres (D), Joan Woodbury (FC).

### **GOALS/OBJECTIVES**

The goals of the Committee were formulated after an initiation of the subject at CLS' statewide meeting in September 2001. CLS felt that it was important to address the issue of a uniform policy of Priority setting and implementation, especially given the new statewide organization serving the same client base throughout the State of Colorado. Thus, this Committee was formed.

The goals of the Committee are as follows: first, to establish a uniform policy of priority setting that will be followed by each individual office as they endeavor to meet the needs of their client community; and two, to create an information instrument of priorities for every office to be used by each office as they work to assist clients from around the state in a meaningful way.

### **SUMMARY OF WORK**

The Committee met monthly from October to March with the goal of first articulating our goals and objectives, and then to explore how to meet those goals and objectives. The Committee first worked on assessing the objectives of each member in participating in the committee; then, we worked to achieve uniformity of goals. Some members were concerned about trying to develop one list of priorities for the entire state, others were concerned about the impact of such a list on small offices that did not have resources to accommodate priorities that might be more expansive than were currently being followed. The Committee discussed these and other issues extensively, but ultimately decided that the most feasible and useful instrument would be one that assisted each office in developing their own protocols which would reflect the needs of their client community, while taking into consideration many other factors (resources of office, past statistics of cases handled, and so forth). Thus, two products were developed: one, A Process for Establishing Case Acceptance Protocols, and two, A Protocols Matrix. (See, Rationale section below for an explanation of these products).

The Committee discussed in detail the pros and cons of various ways to implement the "Process" in each office. The Committee adopted the following plan: three office will act as "pilots" for the implementation of the process. These three: Boulder, headed by Elizabeth Moulton; LaJunta, headed by Larry Daves; and Pueblo, headed by Roberto Silva; will soon begin the process developed by this Committee. Once they have completed the process, they will complete a

report that will attempt to delineate, as clearly as possible, what they did as part of the process, as well as what was successful and what was not. The report will be submitted to this Committee for analysis and any necessary modification of the process that was already proposed. It is our hope that once the pilot offices complete their case acceptance protocol process, and the Committee modifies the Process document as a result, that the whole process will be demystified for the other CLS offices around the state, and each office will willingly participate in this process.

## **PRODUCTS**

The two products developed by the Committee are: “A Process for Establishing Case Acceptance Protocols” and “A Protocols Matrix”

## **RATIONALE FOR PRODUCTS**

The rationale for the first product is the result of considerable debate by the Committee over the issue of one set of statewide case acceptance protocols versus individual offices having the autonomy to set their own protocols. While both approaches have merit, the overriding Committee sentiment was that the issues of available office resources and sensitivity to community needs should be the paramount concerns for the setting of case acceptance protocols. The product “A Process for Establishing Case Acceptance Protocols” gives great deference to those concerns, while at the same time addressing the necessity of completing the process in each office the same way.

The rationale for the second product is partially a byproduct of the first. Once each office goes through the case acceptance protocol process, it will (ideally) have produced a comprehensive document that will reflect most of the objectives specified above. Such a comprehensive document will be useful for that particular office, obviously, in assisting the staff in more efficiently evaluating applications for services. It will also be useful to the community as a whole: such a document can be shared with the judiciary, with social services organizations, and community groups.

The Matrix, our second product, will enable any CLS employee, based anywhere in the state, to quickly identify the types of services offered by each office, and thus the type of service each client can realistically expect to receive from each office. How will this be useful? Let’s say that a client applies for services through the Denver office, for representation on a bankruptcy, but lives in the Ft. Collins service area. The helpful Denver CLS employee can simply review the Matrix to determine whether Ft. Collins provides representation in bankruptcy matters, and if so, appropriately refer that client to our Ft. Collins office. There are other potential uses, as well (for example, it could be used by potential grant funders to highlight the need for additional resources in a

particular area). It could also be used by outside organizations which refer cases to CLS.

## **RECOMMENDATIONS**

We believe that CLS should adopt the use of the two products developed by this Committee, and in addition, support the actual implementation of the Process for establishing case acceptance protocols in each CLS office statewide. We suspect that many offices have not undertaken this process in a long time, if ever, and may not have undertaken the process with much methodicalness. With the merger, and the consequent staff changes in some many areas of the state, many of the current case acceptance lists are outdated, and may not reflect either the needs of our client communities or the staff resources and expertise in each office. We hope that, by developing these products, we've simplified the process for offices, so that the establishment of current case acceptance protocols can be accomplished successfully (and relatively painlessly). Our goal, like CLS's, is the best, most efficient representation of as many poor people in Colorado as possible.