



# Maryland Legal Aid Outcomes Survey 2010: Measuring the Impact of Legal Aid's Services for Older Adults

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## Introduction

Maryland Legal Aid seeks to serve older adults by providing high quality legal services to help them meet their basic human needs and protect and advance their human rights. To help assess the impact of our services, Legal Aid collects outcomes measurement data through our case management software system. This outcomes tracking takes place at the closing of each case.

As part of Legal Aid's evaluation process for the Weinberg Foundation grant, Legal Aid undertook a post-closing survey of clients to gain more information about the measurable outcomes achieved for older adults. This report details the survey process and the data obtained.

## Survey Model

For the second year, Legal Aid conducted a survey of a sample of clients age 60 and over to determine the status of their legal problems after their cases were closed. Last year, we developed a survey instrument for telephone use based primarily upon the surveys used by the Legal Aid Services of Oklahoma<sup>1</sup> and Legal Counsel for the Elderly in D.C.<sup>2</sup> Legal Aid also reviewed a number of hotline outcomes studies.<sup>3</sup> This year, we revised the form for both mail and phone use. Legal Aid then hired a law clerk and volunteer paralegal to conduct the survey calls and assist in data organization.<sup>4</sup>

## Scope of Survey and Data Collection Procedures

In November 2009, Legal Aid mailed a survey to all clients, age 60 and over, whose cases were closed as advice, brief services, or extended representation during the months of June and July 2009. We used the same survey with all clients. We conducted follow-up calls to all of the clients that did not return a completed survey in the mail. The phone surveys were conducted by a law clerk and paralegal during the months of February and March 2010. For each completed survey, the most appropriate "measurable outcome" was determined based on the survey results and the case file information.

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<sup>1</sup> See

[. We chose the Oklahoma survey because they surveyed the entire legal services program, including their advice, brief services, and full representation work, after they conducted an exhaustive outcomes measurement process. Legal Aid also contacted Legal Aid Services of Oklahoma regarding their experience with outcomes measurement since that report.](http://legalhotlines.org/standards/files/OKoutcomes.pdf?)

<sup>2</sup> See Wayne Moore's "Making Self Evaluation Part of Program Management" Fall 2002 MIE Journal article in the Management Information Exchange library.

<sup>3</sup> See [http://legalhotlines.org/library/statistics\\_and\\_reports.cfm.htm](http://legalhotlines.org/library/statistics_and_reports.cfm.htm)

<sup>4</sup> This survey would not have been possible without the hard work of Shawnielle Predeoux, Georgetown University Law Center, class of 2010. Ms. Predeoux's excellent communication and organizational skills were essential to this project. Legal Aid also benefitted from her prior experience working for over 10 years for the Maryland Department of Legislative Services as an auditor. We also appreciate the volunteer efforts of Cynthia Forrester, whose many years of legal secretarial and paralegal experience were highly valuable.

Legal Aid attempted to survey 460 clients of which 174 clients agreed to complete the survey, 101 through the mail (58%) and 73 over the phone (42%). This resulted in a response rate of 37.8%. Due to some clients terminating the call before the survey was completed and some of the clients not answering certain questions, the number of responses for some questions was less than 174.

There were 326 females (70.9%) and 134 males (29.1%) in the survey population. There were 130 females (74.7%) and 44 males (25.3%) who participated in the survey.

### **Data Analysis**

The objectives of the survey were to determine the following regarding outcomes for clients:

- whether clients have increased security in achieving and protecting their basic needs and human rights, including food, shelter, health care, personal safety, and family relationships;
- whether clients gained knowledge to solve their problems;
- whether clients obtained a legal resolution;
- whether clients obtained access to the legal system or intended benefit of law; and
- whether clients were satisfied with the services of the Legal Aid Bureau.

### ***Clients' Increased Security in Achieving or Protecting Basic Needs and Rights***

The services that Legal Aid provides to clients do impact their lives. Approximately 71% of the clients (115) reported that Legal Aid made some difference in their lives. Of these clients, Legal Aid had resolved or somewhat resolved the problem for 95 of them. Legal Aid was not able to resolve the legal problems of 15 clients; however, they still reported that Legal Aid made a difference for them. For the 22% (or 36 clients) who responded that Legal Aid did not make a difference in their lives, Legal Aid did not represent 28 clients, the cases for two clients has not reached a final resolution, Legal Aid answered the client's question for one case, and the other 5 clients did not resolve their problem because they either did not follow the advice of Legal Aid or chose not to pursue a resolution.

Legal issues may impact the health of older adults. For example, 53.9% of the clients (83) responded that the legal problem caused a decline in their health. These callers included those who were calling about a health-related issue, as well as callers who had other legal problems such as consumer or housing law issues. An overwhelming majority of the clients reporting a decline in health (60) stated that they experienced some type of emotional distress (e.g., stress, anxiety, or nervousness). These problems sometimes led to physical symptoms including headaches, high blood pressure, weight loss, and heart problems. Due to the receipt of services from Legal Aid, 19 clients specifically stated that they experienced improved mental or physical health.

### ***Specific Outcomes***

As described earlier, when Legal Aid attorneys and paralegals close a case, they identify a "measurable outcome" obtained for the client, and that outcome is tracked using Legal Aid's case management software. However, this outcomes tracking system is not as useful for advice or brief services cases, as it is often difficult to identify the outcome of the advice at the time of the case closure. Furthermore, the choices are limited to those in the case management software system.

As part of this survey, Legal Aid sought to identify more specific outcomes for older clients. By calling clients several months after their case was closed, it was more likely that the legal problem has been resolved, and that a more specific outcome could be reported. The chart below includes the measurable outcomes identified after Legal Aid's assistance for all clients surveyed.

<b>Measurable Outcome Obtained After Interview</b>	<b>Number of Respondents</b>
CONSUMER - Advice and Referral	41
CONSUMER - Contract Rescinded	2
CONSUMER - Discharged Debts in Bankruptcy	1
CONSUMER - Ended Garnishment	8
CONSUMER - Obtained Refund	2
CONSUMER - Question Answered	4
CONSUMER - Reduced Debt Amount	1
CONSUMER - Reduced Debt Collection Activity	11
CONSUMER - Stopped Debt Collection Activity	24
FAMILY - Advice and Referral	4
FAMILY - Successful Referral	1
FAMILY - Question Answered	2
HEALTH - Advice and Referral	5
HEALTH - Obtained or Preserved Health Insurance Coverage	2
HEALTH - Obtained, Preserved or Increased Medicaid Benefits/Rights	6
HEALTH - Obtained, Preserved or Increased Medicare Benefits/Rights	2
HOUSING - Advice and Referral	14
HOUSING - Avoided Foreclosure	1
HOUSING - Avoided Loss of Homeownership	3
HOUSING - Avoided, or Obtained Redress for, Illegal or Unfair Charges by Landlord	1
HOUSING - Counseling Services	1
HOUSING - Enforced Rights to Decent, Habitable Housing	1
HOUSING - Obtained Access to Housing	2
HOUSING - Obtained Repairs to Dwelling	3
HOUSING - Prevented Denial of Public or Subsidized Housing Tenant's Rights	1
HOUSING - Prevented Eviction from Public or Subsidized Housing	4
HOUSING - Question Answered	2
HOUSING - Successful Referral	1
INCOME MAINTENANCE - Advice and Referral	10
INCOME MAINTENANCE - Benefit Obtained	1
INCOME MAINTENANCE - Food Stamps Preserved	1
INCOME MAINTENANCE - Obtained SSI Benefit/Right	1
INCOME MAINTENANCE - Obtained, Preserved or Increased SSD Benefit/Right	1
INCOME MAINTENANCE - Obtained, Preserved or Increased SSI Benefit/Right	2
INCOME MAINTENANCE - Obtained, Preserved, or Increased Unemployment Benefits	3
MISCELLANEOUS - Advice and Referral	1
WILLS AND ESTATES - Advice and Referral	3
WILLS AND ESTATES - Obtained a Living Will and/or Health Proxy or Power of Attorney	1
<b>GRAND TOTAL</b>	<b>174</b>

It is particularly noteworthy that the more specific outcomes included 24 cases in which debt collection was stopped and 11 cases in which debt collection was reduced because of Legal Aid advice. Legal Aid handles a large number of consumer cases by advising clients regarding how to deal with debt collectors, and this advice appears to be effective. In addition, Legal Aid is improving our consumer practice by creating a set of three client brochures regarding debt collection.

### ***Clients Obtained Knowledge about their Legal Options***

Receiving services from Legal Aid did help clients learn how to solve their legal problems. Of the 157 survey participants who responded to the question asking if Legal Aid helped the client understand his options, a large majority of respondents, or 70.1%, said yes. An additional 10.8% of respondents reported that Legal Aid somewhat helped them understand their options.

Informing clients about their options is an essential part of the legal services that Legal Aid provides to older adults. This is true even for situations where Legal Aid was not able to resolve a client's legal problems. Of the 70.1%, or 110 clients, who understood their options, 64.5% (71) reported that the problem referred to Legal Aid had been resolved, while 17.3% (19) reported that the problem had not been resolved. For these 19 clients, the clients reported that the problem had not been resolved because Legal Aid didn't represent the client (7), Legal Aid had represented the client, but the client did not prevail (3), Legal Aid did represent client or answer the client's question, but the client did not follow the legal advice (5), the problem was resolved without the assistance of Legal Aid (1), or the legal proceeding had not reached a final resolution (3).

### ***Clients Obtained Problem Resolution***

Legal Aid was able to help the majority of the clients obtain resolution of their legal problem. Of the 173 recipients who responded to the question asking whether Legal Aid helped them resolve their problem, 45.7% (79) stated that Legal Aid helped them to fully resolve the problem, while an additional 13.9% (24), reported that Legal Aid somewhat helped them resolve the problem. For the 61 clients (or 35.3%) who reported that their problem was not resolved with the help of Legal Aid, the negative response was mainly due to the client not receiving representation from Legal Aid (33 clients). This is not surprising, as Legal Aid does not have the resources to represent everyone who seeks services. There were an additional 10 clients who reported that they did not follow Legal Aid's advice to resolve the problem.

### ***Clients Obtain Access to the Legal System***

Receiving help from Legal Aid allows clients to have their side of the story heard when legal issues arise. Over 62 % of the 154 clients responded that Legal Aid made a difference in whether or not they were able to have their voice heard in the legal system, while approximately 21% stated that Legal Aid made no difference. The majority of the clients who responded that Legal Aid made a difference and provided an explanation explained that Legal Aid helped the clients understand their rights or options (27) or that Legal Aid helped the client obtain a favorable result (30). The clients who reported that Legal Aid did not make a difference were mainly those who sought representation from Legal Aid, but Legal Aid lacked the resources to provide full representation (16).

Legal Aid clients reported overwhelmingly that without Legal Aid, they would have gone without legal advice or assistance. Only 16% of participants (26) had contacted a private lawyer

about their legal matter. In the absence of Legal Aid, only 31.1% of survey participants reported that they would have tried to talk to a lawyer. The comment of one participant summarizes this: "I am on a fixed income and could not afford a private lawyer. Thank you very much. If I ever need help I feel I can call Legal Aid."

### ***Clients' Satisfaction with the Services Provided by Legal Aid***

Overall, the survey participants were satisfied with the service that they received from Legal Aid. Of the 158 clients that responded, 78.5% (124) reported that the service provided by Legal Aid was excellent, very good, or good. Of the 124 clients that were satisfied with the service that Legal Aid provided, 24 clients stated that their problem had not been resolved (21) or they were not sure if it had been resolved. These clients appreciated the advice or service that they had received from Legal Aid regardless of the outcome for their legal matter. Clients who were less satisfied were primarily clients who sought representation, but Legal Aid could not provide it.

### ***Timing of Client Calls***

In general, older adults seek help from Legal Aid soon after their legal issue arises. Many of the clients, 43.5% (or 67) responded that they called Legal Aid within 6 months of the legal issue developing. Based on the survey results, the clients who contacted Legal Aid within 2 years had their legal issues resolved or somewhat resolved over 60% of the time; while those who waited more than 2 – 3 years only had their legal issues resolved 40% of the time. There was an anomaly in that 59.1% (13) of the clients that contacted Legal Aid over 3 years after the start of the legal problem had their problems resolved or somewhat resolved. However, this may have been due to the majority of those clients (8) receiving extensive services from Legal Aid.

### **Comparison with 2009 Results**

The completion rate for 2010 was higher, due to the use of both phone and mail surveys. 174 out of 460 surveys were completed in 2010, for a completion rate of 38%. In comparison, 108 out of 436 surveys were completed in 2009, for a completion rate of 25%. Overall, the 2010 survey results were comparable to the 2009 survey results. For example, 71% of the respondents for each year reported that Legal Aid made some difference in their life. In addition, the survey respondents from 2009 and 2010 reported that Legal Aid helped them to understand their options 71% and 70% of the time, respectively. There also were no major differences in the responses to whether Legal Aid was able to help the client have their voice heard in the legal system or whether the problem caused a decline in health. There were differences in whether the client was able to obtain problem resolution. In 2010, 46% of the respondents were able to obtain problem resolution compared to 54% of the 2009 survey respondents. This may have been due in part to the length of time the client had the problem before contacting Legal Aid. Legal Aid was contacted within one year of the problem developing for 68% of the 2010 respondents and 81% of the 2009 respondents. The 2010 survey respondents reported higher satisfaction with Legal Aid's services despite not being able to obtain problem resolution as 78% of the clients reported being satisfied with the services compared to 69% in 2009.<sup>5</sup>

### **Comparison of Phone and Mail Results**

Overall, the majority of surveys in 2010 were completed by mail. 58% of the surveys (101) were completed by mail, and 42% of the surveys (73) were completed over the phone. As a whole,

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<sup>5</sup> There was a small change in the question and answer wording from 2009 to 2010 which may account for this difference.

the phone and mail results were very similar. It appeared that clients were more likely to complete the survey by mail when they received more favorable results. The survey disclosed that 53% of the clients responding by mail obtained problem resolution, but only 35.6% of the clients responding by phone obtained problem resolution. The mail respondents were also more satisfied with Legal Aid's Services than the phone respondents as 53.1% reported that the service was excellent as compared to 37.1% of the phone respondents.

### **Conclusions**

By contacting clients several months after their cases were closed, Legal Aid was able to better identify discrete and other measurable outcomes that resulted from its services. Clients achieved increased security in achieving and protecting their basic needs and human rights, including food, shelter, health care, personal safety, and family relationships. The majority of the participants who responded to the survey were able to obtain legal resolution to their problem. Over 70% reported that Legal Aid made a difference in their lives. The clients did learn what options were available to solve their legal problems. Over 70% of participants stated that they understood their options, and over 60% felt that Legal Aid helped them have their voice heard in the legal system. Overall, the survey participants were satisfied with the service that they received from Maryland Legal Aid, with close to 80% of the participants reporting that the service was excellent, very good, or good.