



Measuring Outcomes

Telling the senior legal helpline story.

March 26th, 2009 Webinar

Webinar Goals

- Sharing ideas for collecting and reporting client outcomes
- Developing shared outcome measures for future reporting

Objectives for Collecting Outcomes

- Quality Control – statistical comparison
- Needs Assessment and Asset Allocation
- Showing compliance
- Demonstrating Value to Funders –
Using data for maximum benefit

Outcomes Data from Follow Up Studies

- 92% of clients reported initial benefit
- Getting creditors to stop contact - most successful consumer outcome
- Getting public benefit identified by hotline – highly successful
- Wills/estate planning issues – 70% favorable outcomes
- Family law issues – 30% favorable outcomes

Follow-Up Procedures

Brainstorm

Logic Model Outcomes for Legal Services

Long-term
OUTCOMES

Clients have increased security in protecting their basic needs – food, shelter, Health care, safety, family relationships

Intermediate
OUTCOMES

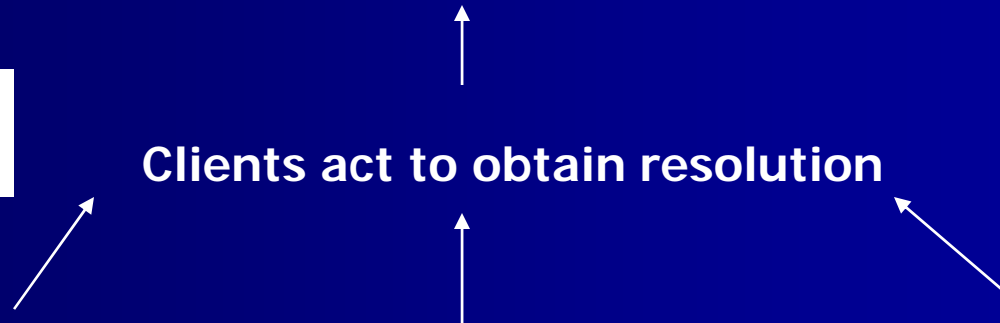
Clients act to obtain resolution

Initial
OUTCOMES

Clients gain knowledge of legal system

Clients gain knowledge of their legal rights and responsibilities

Work with advocate, help themselves through *pro se*, seek help thru non-legal means (social agencies) or not act at all.



Gathering Outcome Data Through Case Report Codes

Level of Service and its Impact on Gathering Outcomes

- Hotlines are not the only ones with problems reporting outcomes
- Barriers that hotlines face when determining outcomes because of limited contact or follow up.
- Importance of hotlines outcomes reporting as part of bigger legal services picture.

Hotline Outputs vs. Outcomes

Outputs for Hotlines

- Are from programmatic perspective – what services were produced? for whom, etc.?
- Statistics that show contract compliance and accountability to funders, e.g.
 - # of cases opened and closed,,
 - # of clients served,
- breakdown of client characteristics to indicate if targeting is being achieved;
- types of legal issue areas being addressed;
- level of service provided

Hotline Outputs vs. Outcomes

Outcomes for Hotlines

- Are from perspective of recipients of hotline services
- Indicate what hotline services actually achieve for older clients, e.g.
- What specific value or impact did hotline services have on the well-being of the older client
- How did the client's condition/situation improve as a result of hotline service?

Selecting Outcomes to Gather for Hotlines

Select Outcomes that --

- Are linked to hotline program goals
- First ask -- What is the hotline trying to accomplish for its older clients?
- Then select outcomes that will indicate how well the hotline is succeeding.
 - Reflect the limited nature of hotline services, e.g.
- Hotlines are not intended to provide in-depth legal services, and
- Hotlines are specifically designed to be low-cost, meaning they provide limited services – legal information, advice, and in some cases, brief service

Initial Outcomes – LCE

- **Code list, by Major Benefit Obtained by Client**
- **Information; *0001 through 0009***
- 0001 Obtained verbal explanation of legal rights, responsibilities or procedures
- 0009 Obtained miscellaneous information; not legal advice
- **Advice; *0010 through 0019***
- 0010 Obtained legal advice/counsel; no further services received
- 0011 Obtained legal opinion; no further services received
- 0019 Obtained other advice (including non-legal advice)
- **Brief Services; *0200 through 0029***
- 0200 Obtained legal advice/counsel based upon individualized legal research
- 0021 Obtained advice/counsel based upon review of a document
- 0022 Obtained assistance in writing letter with legal import
- 0023 Obtained assistance in filling out a form
- 0024 Obtained consultation with an attorney other than LCE
- 0029 Obtained other brief legal assistance

Software Data Collection

- Input from group – what processes do you use to gather outcome data from software systems?

Intermediate and Long Term Outcomes

Telling the Fuller Story with Data and
Description

In the latest reporting period we closed 2262 cases

Outcomes report

- In the reporting period we obtained prescription drug insurance for 381 clients improving the likelihood that they will buy and use essential prescription drugs and saving the clients an estimated \$381,000 per year.
- We also obtained free prescription drug insurance for 44 clients allowing them to obtain prescriptions for a co-pay of not more than \$5, resulting in savings for these clients of as much as \$132,000 per year.
- We obtained Medicaid coverage to pay for the cost of nursing home care for 61 clients resulting in an estimated \$2,050,000 in annual payments for nursing home care.
- We provided assistance to 1776 other clients on issues ranging from family law to probate.

Money talks



- Value builds up fast
- Justifies the cost of providing services
- Not everything has an economic value
- Look for benefits obtained
- Costs avoided
- Requires different measures for different problem codes and services

Example

- Established eligibility for Medicare Part D Extra Help
- Count the number of completed applications - verify approval or adjust for SSA average rejection rate
- Average benefit per client = total value of services

Second Example: Medicaid long term care qualifying income trusts

- Can't be approved for Medicaid without one
- Can't establish the trust without the help of an attorney
- Average Medicaid benefit x number of approved trusts = \$big dollars
- Small number, average private attorney rate to do the same work (\$500 vs. 2 hours of your time = about a \$400 per client savings.)

Power of Attorney

- Tell the story with words and numbers
- Not everything has an economic value
- Paint the overall picture with emphasis on details

Brainstorm

- How do you collect data for intermediate/long term outcomes?
- How do you report it?

Outcome for 2008-09

Number of Advance Directives

Number of cases where client was identified as eligible for benefit

Input from group as to possible 2009 outcomes.

Action Step

- Email us follow up surveys, reports, and outcomes you are currently collecting.

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Bibliography

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