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bridging the justice gap

Nuts & Bolts of a Successful Access to Justice Program or Initiative

Funding, User Testing, Outreach and Feedback

New York State Permanent Commission on Access to Justice: 2023 Statewide Stakeholders Meeting

Monday, June 12, 2023

Speakers

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About Pro Bono Net

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bringing the power of the law to all

Our programs:

- Help individuals access, understand, and exercise their legal rights
- Make it easier for legal advocates to do the most good
- Support national and regional efforts to expand access to justice

About the New York Justice Initiatives

LAW HELP NY

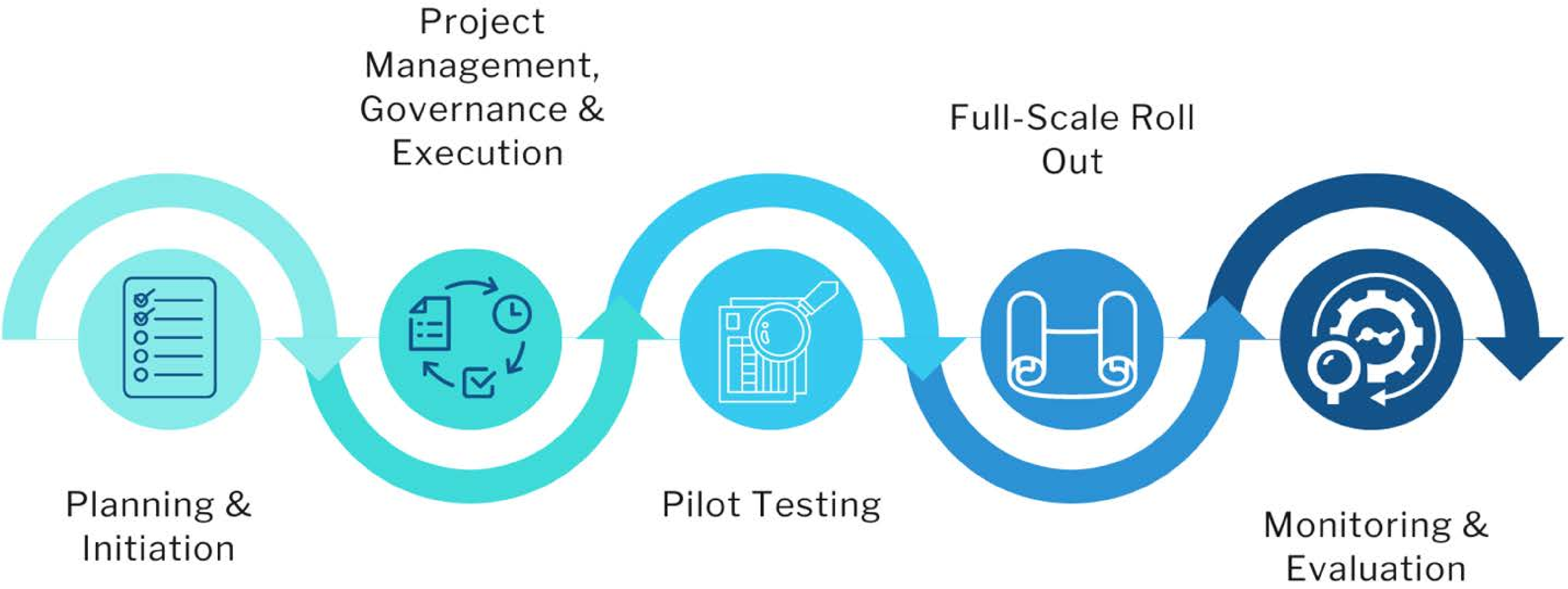
NY Crime Victims Legal Help

TenantHelp NY

probono.net/ny

New York State has long been a leader in the access to justice community. From New York City to rural upstate, Pro Bono Net's New York Justice Initiatives (NYJI) play a transformative role in how legal help reaches the underserved across the state. Anchored by **LawHelpNY** and the **LiveHelp** online chat programs, NYJI also includes **NY Crime Victims Legal Help**, **Tenant Help NY**, and **Pro Bono NY**.

5 Key Stages for a Successful Access to Justice Program or Initiative



#1: Planning and Initiation

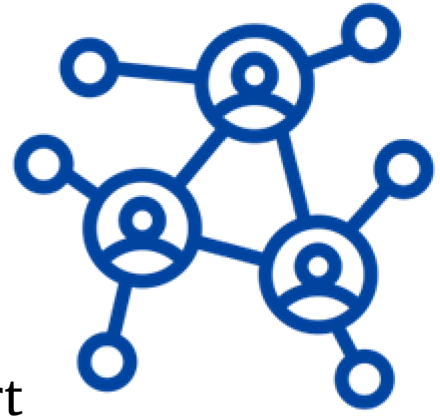
Project Planning and Initiation

- **Concept and initiation**
  - What is the problem or need you're trying to address?
  - What will success look like, short and long term?

- **Needs assessment**
  - Who is the target audience?
  - What are their concerns, needs and preferences?
  - How many people need this service?
  - What data already exists about this issue that we can learn from?
  - Is any other organization already providing this service to litigants or working on this issue?

Project Planning and Initiation

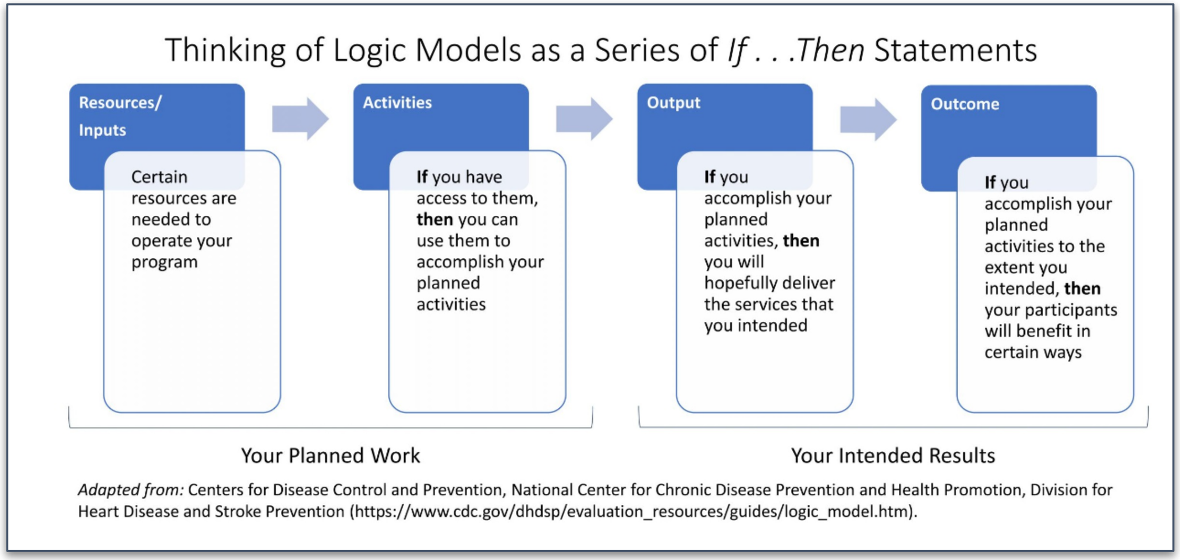
- **Stakeholder analysis & engagement**
  - What other people or groups can impact - or be impacted - by the project?
  - How you can best engage and collaborate with them now, and throughout the project lifecycle?
  - Stakeholders can include litigants, other community members, court staff, community partners, subject matter experts, researchers



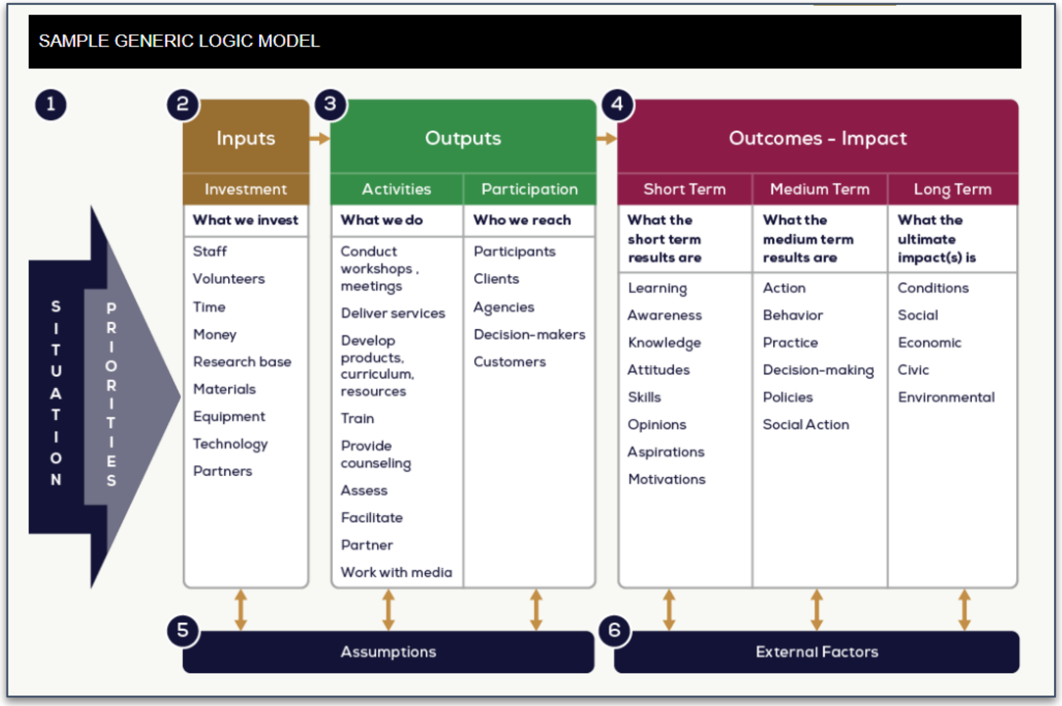
- **Defining the scope**
  - Given this learning, what aspect of this issue is your program/project best suited to address? What resources and funding is needed to undertake it?

Practical Tools and Tips

Create a simple **logic model** to capture how your activities will lead to your intended outcomes. It’s a great planning tool, and also can serve as the basis for your project evaluation efforts.



[CDC logic model template]

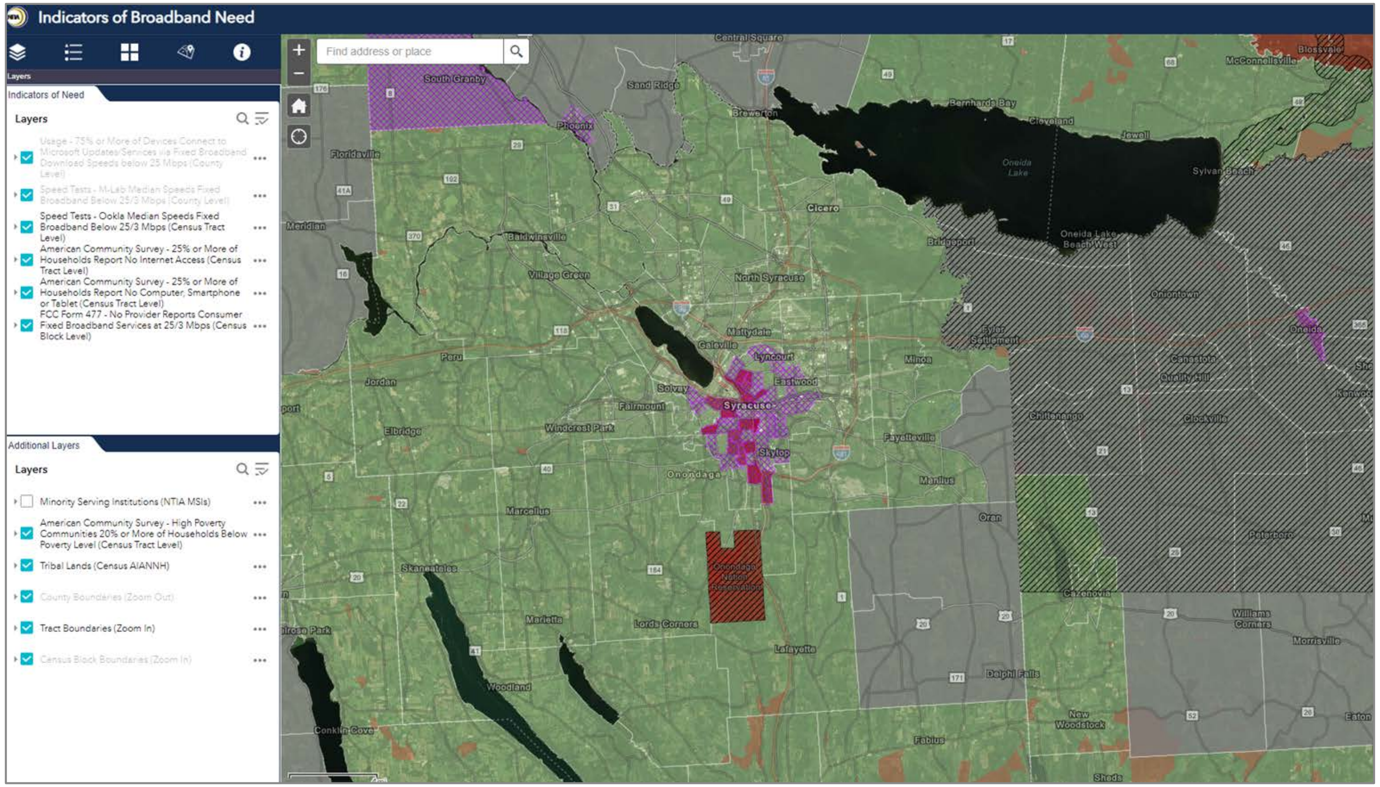


[DOJ Elder Justice Initiative Logic Model]

Practical Tools & Tips

Potential data sources for needs assessment:

- Existing program and litigant data and feedback
- [New York Courts Access to Justice Program publication data]()
- [Census.gov]()
- [NTIA Indicators of Broadband Need Mapping Tool]()



National Telecommunications and Information Administration Indicators of Broadband Need Map
https://www.ntia.gov/press-release/2021/ntia-creates-first-interactive-map-help-public-see-digital-divide-across-country

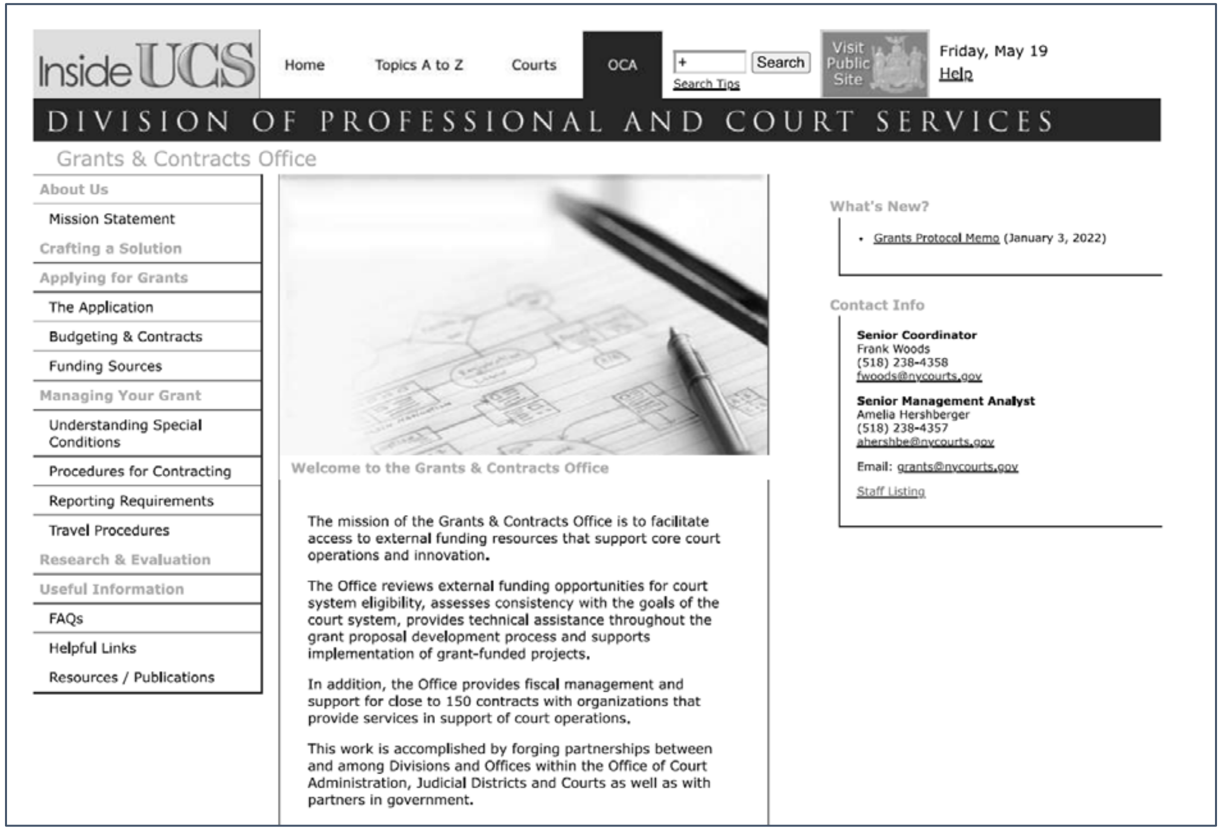
Practical Tools and Tips

Funding resources

- Grants and Contracts Office
  - [Intranet (InsideUSC) link]
  - [Public link]

- [Candid.org]

- Talk to programs that secured funding for similar projects. Can they share their learning and offer suggestions?



#2: Project Management, Governance & Execution

Project Management

- Scope
  - Brainstorm with key stakeholders and participants to define what is and what is not within the scope of the project
- Cost
  - Prepare a realistic budget by breaking down costs by categories such as personnel, technology, supplies, space, training, etc
- Time
  - Create a schedule with milestones and deliverables

Project Governance

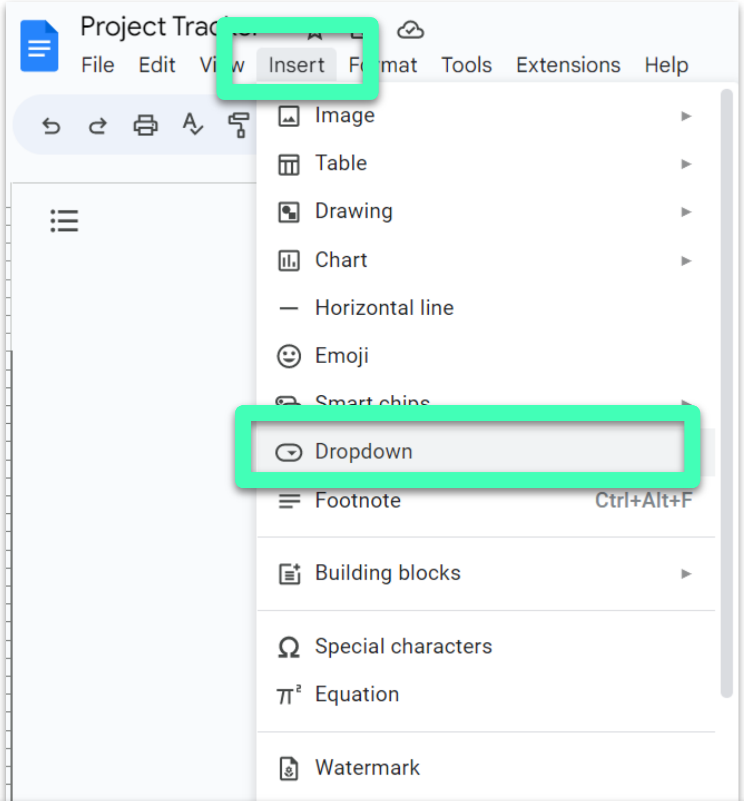
- Assemble your team
  - Includes sponsor, project manager, team leader & members
- Identify stakeholders
  - People who are involved or are affected by the project's activities, who contribute resources, and who will benefit from the project
  - Internal, external, consultants, funders
- Assign roles
  - Consider the MOCHA model
- Craft a communications plan
  - Identify goals, members, frequency, and tools
  - At minimum, schedule weekly meetings

Risk Assessment & Management

- Identify risks at the outset
- Build in extra time and costs to reduce risk and be transparent about this with the project team
- Make contingency plans for adjustments in scope, cost, or time to mitigate risks
- Review and evaluate along each step of the project and be prepared for tradeoffs
- Share progress and challenges with stakeholders regularly to help identify and manage risks

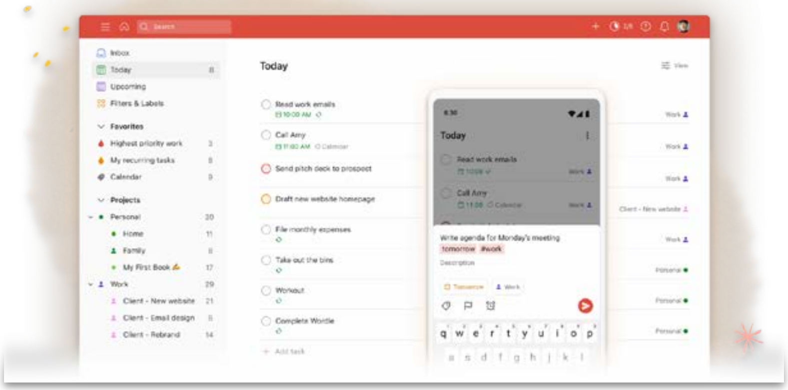
Practical Tools & Tips

- **Google's Google Documents Project Management Features**
  - Create tables for better tracking of tasks and roles
  - Track project management status with labels and colors
- [GooDocs]()
  - Find easy and free Google Document templates for project management and to-do lists
- **Calendar Invitations** (e.g., Microsoft Outlook)
  - Schedule reminders for your team as meeting invitations
  - [Assign color categories to calendar events to organize your projects]()



Project Task	Deadline	Status
Phase I: Initial Scoping		
Review and update project scoping list	4/19/2023	Completed
Review and update project onboarding plan	4/26/2023	In Progress

Practical Tools & Tips

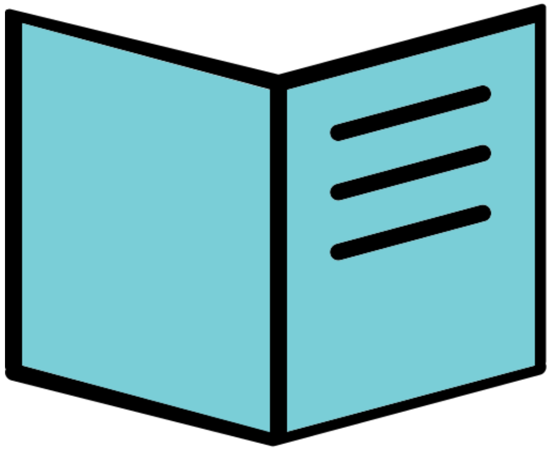


- **Free Online Project Management Tools**
  - E.g., Todoist - Create projects and subprojects, manage to-do lists and add collaborators, add dates and set up recurring tasks automatically
- **Before starting a project:**
  - Think about the different phases of the project and organize tasks according to each phase
  - Tasks should be manageable and should have a deadline to help everyone stay on track
  - Think about how you will communicate project updates to your team and/or partners
- **After the project:**
  - Schedule a debrief meeting with your team to go over what went well and review any areas of improvement. It's also a good opportunity to celebrate all the work you did!

#3: Pilot Testing

Project Pilot Testing

Goal: Evaluate how your project will operate in real-time and identify potential issues or areas for improvement before the project's full-scale implementation. Consider the following:



1. **Participants** - Select the people who will participate in your pilot project. Are they part of your team? Will you be recruiting people?

1. **Pilot Guide / Technology** - Develop a simple written guide for partners or people that will be part of the pilot testing. The guide can include step-by-step instructions on what everyone will do, guiding questions, screenshots (if applicable), and desired results. If the project involves using technology, ensure that the technology is working properly and that you have tested it before the pilot.

Project Pilot Testing

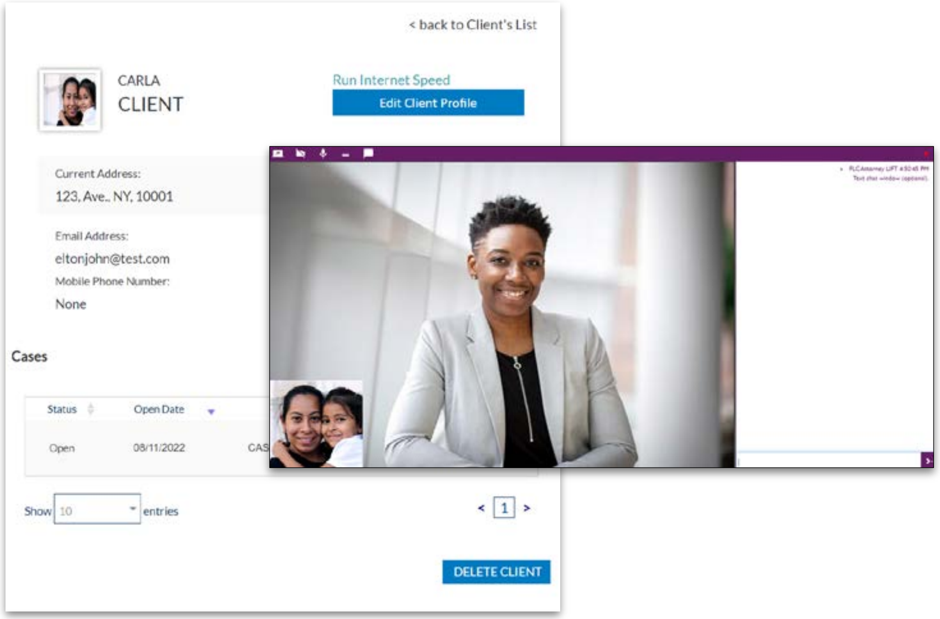
Goal: Evaluate how your project will operate in real-time and identify potential issues or areas for improvement before the project's full-scale implementation. Consider the following:

3. **Feedback** - Determine the way you will collect and document feedback for review.

- E.g., Will you ask participants to complete feedback forms? Will you interview them and have someone take notes?
- Schedule a "post-pilot feedback session" to go over the pilot results.

Project Pilot Testing - Virtual Clinic Example

REMOTE LEGAL CONNECT



- **Project Pilot Testing Goal:** To ensure that pro bono clients can 1) successfully connect with pro bono attorneys via video or phone and 2) successfully share documents with an attorney via the Remote Legal Connect platform.
- **Format and Duration**: Mock virtual clinic, 2 hours (1 hour to go over instructions via Zoom, 1 hour to conduct pilot and gather feedback via the Remote Legal Connect platform).
- **Participants:** 3 people from the partner organization will act as the pro bono attorneys and 3 people from Pro Bono Net will assume the role of the pro bono clients. Everyone will be set up with test accounts.

Practical Tools & Tips

- **Collecting Feedback During Pilot**
  - One-on-one interviews
  - Free digital interactive whiteboards or apps like Google's Jamboard or Miro
  - Create feedback surveys with tools like Microsoft Forms (available to court staff via the Microsoft Suite), SurveyMonkey, Typeform, or Google Forms
  - Reach out to relevant stakeholders (e.g., legal aid organizations, community outreach leaders, organizations) who can provide additional insights and support during the pilot testing phase
- Checklists for participants to complete during the pilot, if needed

REMOTE LEGAL CONNECT

Pilot Testing CheckList - [Organization Name]

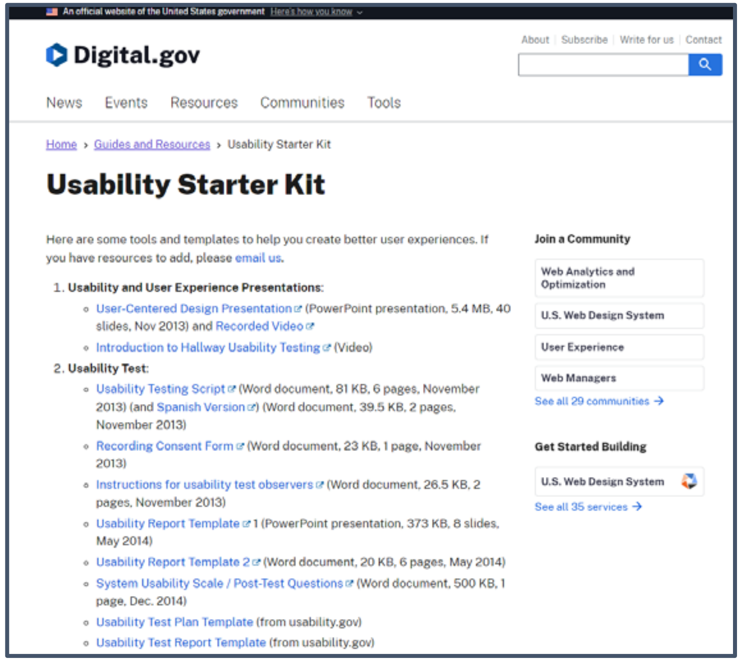
Checklist Testing Scenario

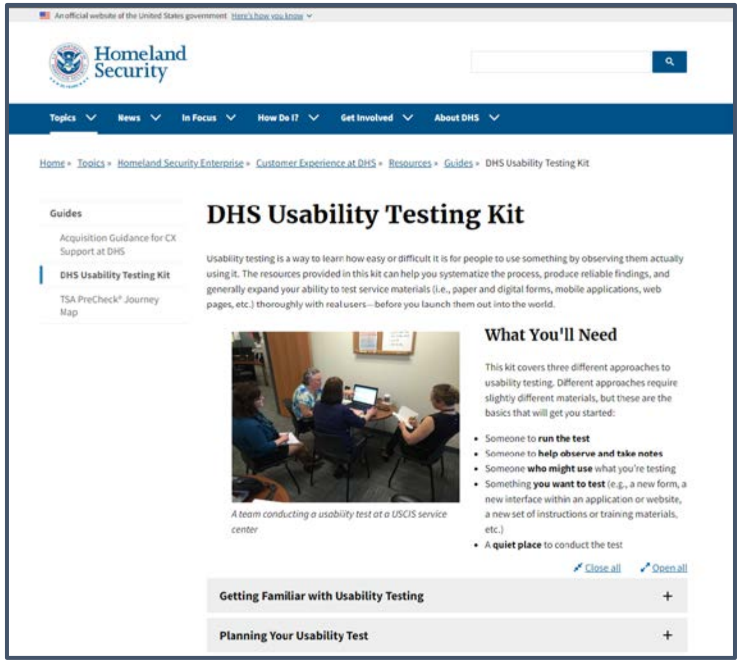
No.	Task	Assigned To	Status	Notes / Observations
	Logging In			
1	Navigate to the homepage of your preferred browser.	Pete	Completed	
2	Log in using your fake account credentials.	Pete	In Progress	
3	Please confirm you can see the correct court form.	Pete	Incomplete	

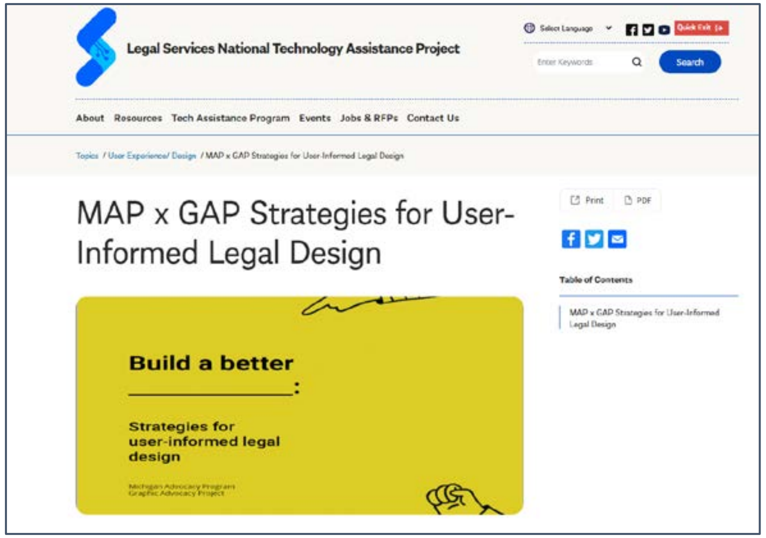
Practical Tools & Tips

User testing: A little research can go a long way.

Help Centers and Public Access Law Libraries in many jurisdictions can be asked to assist with litigant user testing.







[Digital.gov Usability Starter Kit](#) [DHS Usability Testing Kit](#) [User-Informed Legal Design: A Practical Guide](#)

#4: Full-Scale Roll-Out

Project Launch

Goal: Raise awareness about your access to justice program and how it can help your target audience.

- Confirm a formal launch date (you may consider a "soft launch" if you need more time for a formal launch)
- Draft an announcement or press release sharing information about your program
- Focus on communicating the impact and importance of your program and how it will help people
- Coordinate with your social media team and collaborators/partners about announcing your launch

Outreach and Promotion Plan

An Outreach and Promotion Plan should identify:

- Audience
- Desired action
- Message
- Venue
- Method
- Resources needed
- Priority in the next 6 months
- Who’s responsible?

Outreach and Promotion - LawHelpNY

How LawHelpNY can help the courts promote new products and services:

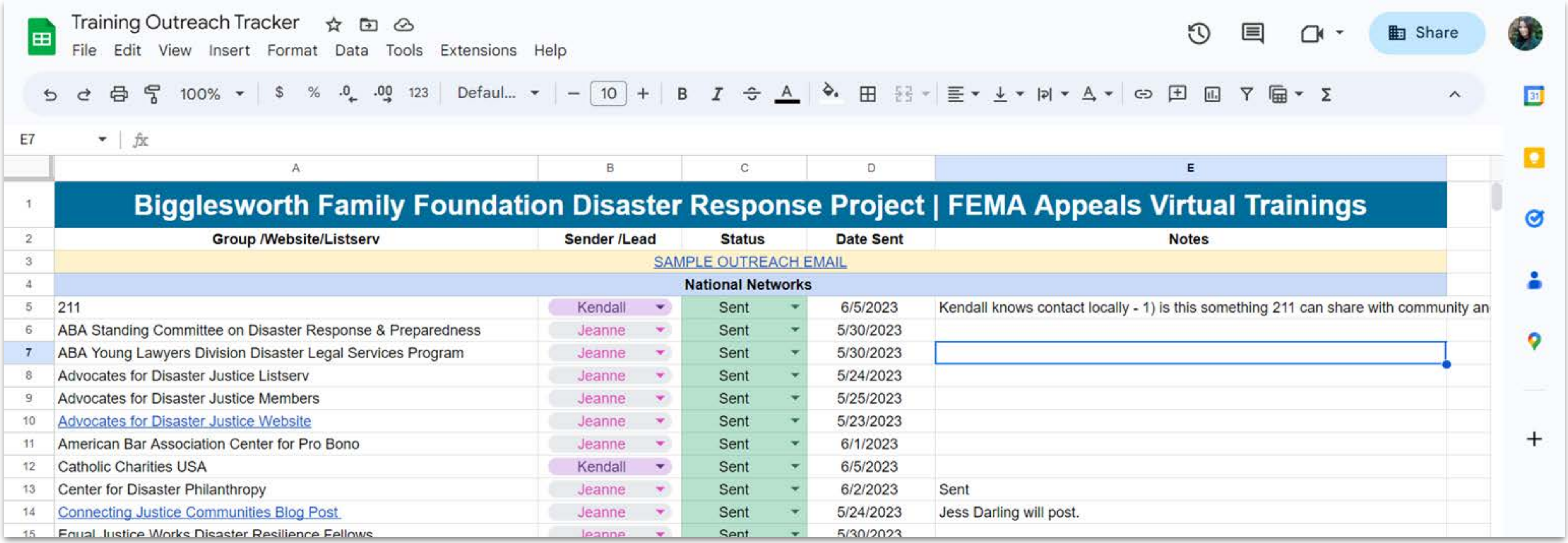
- Craft plain-language resources on LawHelpNY
- Add clinics to the Legal Help Directory
- Build Guides that describe and direct users to the product or service
- Write blog posts
- Expand LiveHelp online chat trainings
- Include in newsletters, listservs, and social media

Practical Tools & Tips

- **Project Launch Outreach**
  - Intranet homepage for the OCA Office of Public Information
  - The court system's Facebook, Twitter, and Instagram accounts.
  - For any programs or initiatives where the court system is a partner, requests for social media postings can be sent to John Caher, jcaher@nycourts.gov, 518 453-8669.
  - Who can people contact if they want to learn more about your initiative?
  - Are there community organizations that can help you spread the word?
  - Offer demos or informational sessions about your A2J initiative

Outreach Tracker Example

By documenting your outreach efforts, you can effectively track the various groups with whom you have shared your announcement, assign roles for outreach, and ensure you stay on track with target deadlines.



Group /Website/Listserv	Sender /Lead	Status	Date Sent	Notes
Bigglesworth Family Foundation Disaster Response Project | FEMA Appeals Virtual Trainings				
SAMPLE OUTREACH EMAIL				
National Networks				
211	Kendall	Sent	6/5/2023	Kendall knows contact locally - 1) is this something 211 can share with community an
ABA Standing Committee on Disaster Response & Preparedness	Jeanne	Sent	5/30/2023	
ABA Young Lawyers Division Disaster Legal Services Program	Jeanne	Sent	5/30/2023	
Advocates for Disaster Justice Listserv	Jeanne	Sent	5/24/2023	
Advocates for Disaster Justice Members	Jeanne	Sent	5/25/2023	
Advocates for Disaster Justice Website	Jeanne	Sent	5/23/2023	
American Bar Association Center for Pro Bono	Jeanne	Sent	6/1/2023	
Catholic Charities USA	Kendall	Sent	6/5/2023	
Center for Disaster Philanthropy	Jeanne	Sent	6/2/2023	Sent
Connecting Justice Communities Blog Post	Jeanne	Sent	5/24/2023	Jess Darling will post.
Equal Justice Works Disaster Resilience Fellows	Jeanne	Sent	5/30/2023	

#5: Monitoring & Evaluation

Monitoring & Evaluation

Goal: To collect and analyze data to measure impact and evaluate areas of improvement.

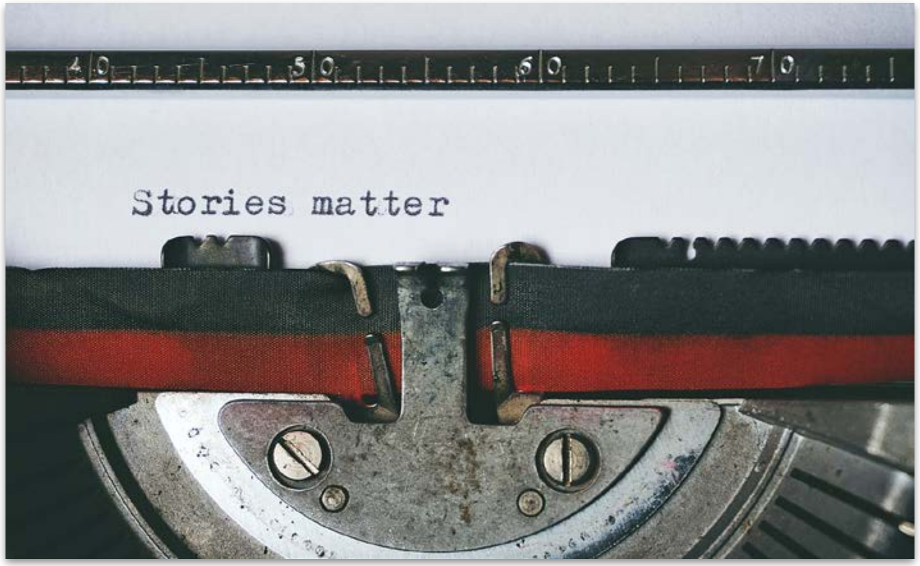
- **Determine the Metrics**: Determine first the type of metrics that you want to monitor as part of your program. Every program will have different indicators to measure progress. Consider the following:
    - What specific outcomes do you want to see through the program?
    - What does progress look like?
    - Who will need to understand and interpret the data?

Monitoring & Evaluation

Goal: To collect and analyze data to measure impact and evaluate areas of improvement.

- **Collecting Data**: Identify the mechanism through which you will collect these metrics (e.g., Will you need to involve your IT department?, How will you collect the metrics you need and how long will it take to obtain them? Will anecdotal data be useful to measure your progress? If so, how will you collect that information and how often?)

- **Analyze the Data**: Look for trends and patterns. Are there any issues? What does the data tell you about how people are engaging with your program? Is there a story you can tell to engage even more people?

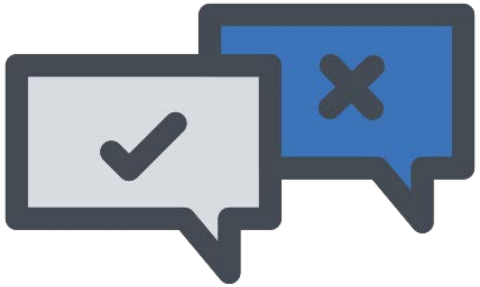


Practical Tools & Tips

Sample Questions - Satisfaction Survey

- **The service I received from [program] was an overall positive experience.**
  - Strongly Disagree
  - Disagree
  - Neutral
  - Agree
  - Strongly Agree

- **It was easy to navigate and participate in the [program].**
  - Strongly Disagree
  - Disagree
  - Neutral
  - Agree
  - Strongly Agree

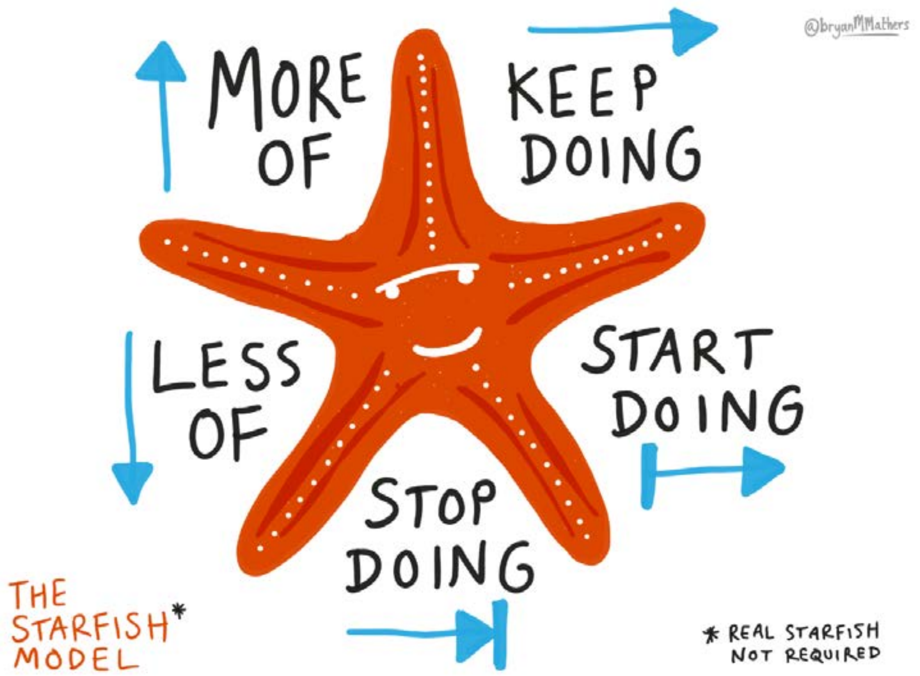


Maintenance, Sustainability & Learning

- In the initial needs assessments, identify whether the project is intended to serve long-term or short-term needs (an example of short-term would be covid-related eviction resources)
- Include funding for maintenance and an evaluation period after launch
- Use learnings to assess viability of the program
- Don’t chase after sunk costs if market conditions change

Celebrate success - and learning

- What worked well?
- What didn't work well?
- What should we do differently next time?
- Anything that left you puzzled?
- What shout-outs do you have for your teammates?



Practical Tools & Tips

- Online survey tools to evaluate the program like SurveyMonkey, Typeform, or Google Forms

- **Storytelling & Communicating the Impact of Your Program**
  - Voices for Civil Justice (as of January 2023, VoicesforCivilJustice.org is archived, but it still provides many useful resources).
  - Use the "VPSA"Method by the Opportunity Agenda: The Formula for Building Your Message (Values, Problem, Solution, Action)
  - Show the impact of your project / program by using layouts already created for you - Free Tools:
    - PowerPoint's Designer shows you ideas for the layout of your presentation
    - Slidesgo.com
    - Canva.com
  - Look to other programs for ideas on what has worked for them and other guidelines that can help measure the impact of your program.

Questions?

Other Resources

- Remote Legal Support: A Guide for Nonprofit and Pro Bono Innovation Includes successful remote legal support programs and their program logistics, processes, challenges, tools, checklists, sample documents, and best practices.

- Remote Legal Support: A Post-Pandemic Guide to Nonprofit and Pro Bono Innovation contains materials, survey results and analysis, and observations on pro bono practice during the pandemic.

Thank You

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