



**Legal Services Corporation  
Technology Initiative Grant (TIG) Program  
Evaluation Plan Form**

**Grantee name:** Bay Area Legal Services  
**Submission date:** July 24, 2020

**TIG Grant number:** 20001

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**Project Goal:** Increase the quality and value of direct services to clients of Bay Area Legal Services (BALS), through business process improvement (BPI) initiatives combined with the use of document assembly software and LegalServer, to create automated documents and processes that improve the ease-of-use, efficiencies, and accuracy in the production of client and court documents.

**Project Objective 1:**

Implement business process improvement initiatives through firm-wide advocate and staff trainings. Trainings will occur throughout the two-year project period. Approximately 100 BALS staff will receive BPI training during the project period. (Year 1 & Year 2)

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**Strategies / Activities:**

- Provide introduction to BPI and overview of planning for LSC TIG project during required all-staff annual training. (Tentatively October 2020)
- Develop introductory BPI training materials. (Y1Q1-Y1Q4 & Ongoing)
- Work with each BALS team (office/program) during 2-3 team meetings each year to provide BPI training. Approximately 70 team trainings in total. (Y1Q2-Y2Q4 & Ongoing)
- Make BPI and project materials available to staff on internal shared platform. (Y1Q2-Y2Q4 & Ongoing)
- Use surveys/interviews to solicit feedback from participating BALS advocates and staff. (Y1Q2-Y2Q4 & Ongoing)

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**Evaluation Data:**

- Copies of BPI education/training materials
- List of advocates/staff who received education/training

- List of dates of trainings and number of attendees at each
- Feedback data from surveys/interviews

**Project Objective 2:**

Design, implement, and assess BPI initiatives through hands-on pilot projects identified by advocates and staff. Approximately 15-20 advocates/staff total will participate in at least two hands-on projects. (Year 1; Year 2 Q1&Q2)

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**Strategies / Activities:**

- Work with advocates and staff to identify and choose at least two hands-on pilot projects. (Y1Q1-Y1Q3)
  - Lead two small groups on hands-on pilot projects and implement new processes. (Y1Q2-Y1Q4)
  - Use surveys/interviews to solicit feedback from participating BALS advocates and staff. (Y1Q2-Y1Q4)
  - Train applicable advocates/staff on new processes. (Y1Q3-Y1Q4)
  - Use surveys/interviews to solicit feedback from all BALS advocates and staff. (Y1Q3-Y2Q1)
  - Follow-up assessment of new processes. (Y1Q4-Y2Q2)
  - Produce analysis of project results and potential for replication internally and by other legal aid firms (Y1Q4-Y2Q2)
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**Evaluation Data:**

- Summary of advocate/staff hands-on pilot projects
- List of advocates/staff participating in each hands-on pilot project
- Documentation materials from each hands-on pilot project
- Feedback data from surveys/interviews
- Analysis of pilot projects

**Project Objective 3:**

Integrate document assembly software and LegalServer client management software to create new automated documents and processes that improve ease-of-use and efficiencies as BALS advocates/staff produce client and court documents. (Year 1 Q4; Year 2)

Create 35 new/improved documents in total (including those in Spanish when applicable) (Year 1 Q4; Year 2)

- 5 automated documents for general firm-wide use
- 5 automated for the Volunteer Lawyers Program
- 5 automated documents for each substantive practice area:
  - family law (including juvenile dependency and domestic violence)
  - housing law (including eviction and foreclosure)

- consumer law (including employment, bankruptcy, and tax)
  - veterans' legal services
  - senior advocacy
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**Strategies / Activities:**

- Continue to develop BPI training materials (Y2Q1-Y2Q4)
  - Work with advocates/staff to identify priority opportunities and documents to automate. (Y1Q4)
  - Integrate document assembly software with LegalServer database management system. (Y1Q4)
  - Work with advocates/staff to develop improved document templates/workflows. (Y1Q4-Y2Q3)
  - Conduct usability testing with advocates/staff on new document templates/workflows. (Y2Q2-Y2Q3)
  - Modify document templates/workflows based on identified issues in usability testing. (Y2Q2-Y2Q3)
  - Train applicable advocates/staff and make automated documents available firm-wide. (Y2Q3-Y2Q4)
  - Make additional modifications as needed. (Y2Q4 & Ongoing)
  - Use surveys/interviews to solicit feedback from advocates/staff users. (Y2Q4 & Ongoing)
  - Follow-up assessment of new processes. (Y2Q4 & Evaluation Period)
  - Produce analysis of project results and potential for replication internally and by other legal aid firms (Y2Q4 & Evaluation Period)
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**Evaluation Data:**

- Copies of BPI education/training materials
- List of advocates/staff who received education/training
- List of dates of trainings and number of attendees at each
- List of implemented changes (i.e. automated documents produced and process improvements)
- Documentation/materials relevant to development of new automated documents and processes
- Feedback data from surveys/interviews, including clients as appropriate
- Analysis of results of document automation and new processes