

REQUEST FOR PROPOSAL EVALUATION OF TIG 20001 PROJECT

Bay Area Legal Services (BALS) will consider all responses that are sent to the project manager, David Gray, by 5:00 p.m. EST on December 23, 2020. Please include the name of the project, "Evaluation of TIG 20001 Project" in the subject line. All vendor communications concerning this RFP must be directed to dgray@bals.org. Any oral communications will be considered unofficial and nonbinding on BALS. Only written statements issued by the project manager may be relied upon.

INTRODUCTION

Through this Request for Proposal (RFP), Bay Area Legal Services (BALS) seeks responses from vendors interested in evaluating the effectiveness of BALS's business process improvement and document automation project (TIG 20001). In addition to conducting the evaluation, the successful vendor will produce a draft of the evaluation report. This project is funded by a Technology Initiative Grant (TIG) awarded by the Legal Services Corporation (LSC) with an evaluation budget of \$10,000-\$15,000.

ABOUT US

Founded in 1967, Bay Area Legal Services (BALS) is a nonprofit law firm serving low-income residents in the Tampa Bay area, and seniors and veterans across the state of Florida. BALS helps with legal problems such as family law and domestic violence, housing law and eviction, consumer law, government benefits and healthcare, bankruptcy, taxes, disaster relief, issues affecting seniors and veterans, support for nonprofit businesses, and many more legal matters. Last year, the firm received more than 58,000 applications for services and assisted approximately 17,600 individual families and community groups – including more than 4,500 senior clients, 3,300 clients with housing problems, 1,200 veterans, and 400 domestic violence survivors. Additional information regarding BALS and our services is available on our website: <https://bals.org/>.

PROJECT DESCRIPTION

The goal of TIG 20001 is to increase the quality and value of direct services to clients of BALS through business process improvement 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. This goal will be reached through three objectives:

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.
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.
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.

The evaluation will assess the usefulness, usability, accuracy, and efficiency of the BPI employee training, pilot projects, and document automation technology. In addition, the evaluator will work with BALS to structure the evaluation and help compile the information into a report no later than April 30, 2023. BALS wants to ensure it is collecting and measuring the most applicable data from the start of its

project. What are our questions? How do we answer them? From whom and what instruments are needed? What exactly do we need to know? The vendor's pre- and post-design of the evaluation is key to showing if TIG 20001 is successful and replicable.

To accomplish this, it is intended the evaluation will be comprised of information and data, including but not limited to:

BPI employee training:

- 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

Pilot projects:

- 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

Document automation:

- 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

For more information see the attached Project Narrative (page 6) and Program Evaluation Plan Form (page 11). It is anticipated that the vendor will work with BALS staff to conduct the surveys and interviews and that necessary data will be gathered by BALS and project partners.

NOTE: No travel is necessary for this project.

SELECTION SCHEDULE (SUBJECT TO CHANGE)

- BALS opens RFP: December 2, 2020
- Deadline for bidders to submit questions: December 11, 2020
- BALS response to bidder questions: December 16, 2020
- Bidder proposals due: December 23, 2020
- Successful vendor announced: December 30, 2020
- Contract signed and work commences: January 6, 2021

PROJECT TIMELINE

The TIG project started November 1, 2020, and ends October 31, 2022, with a nine-month evaluation period ending on July 31, 2023. BALS anticipates the evaluation work will start on January 6, 2021, and the formal evaluation will be completed within six-months of the TIG project ending, no later than April 30, 2023.

PROPOSAL FORMAT

RFP responses should be delivered via email in Microsoft Word or Adobe PDF format. Proposals should adhere to the format below.

- Introduction/Executive Summary, including:
 - Project understanding, recommendation, and objectives
- Project Schedule and Development Process, including:
 - Your approach to the evaluation process
 - Process for creating a final scope of work document, e.g., define deliverables, create milestones, etc.
 - Your customer communication and project management procedures
- Project Budget Estimates and Costs Projections, including:
 - Provide a breakdown of costs
 - Identify any additional expenses, fees, etc. that you will require to complete the project
 - Travel should not be included
 - The budget will NOT exceed \$15,000 for the project
- Company Profile, including:
 - Background, capabilities, and related experience
- Attachments:
 - Examples of similar projects recently performed
 - Short biographies of all who will work on the project
 - Professional references

SELECTION CRITERIA

We will consider all responses that are sent to the project manager, David Gray, by 5:00 p.m. EST on December 23, 2020. Please include the name of the project, "Evaluation of TIG 20001 Project" in the subject line.

The following criteria will be used to evaluate the submitted proposals:

- Experience working with legal aid organizations and/or with nonprofit organizations
- Demonstrated commitment to exceptional customer service and responding to client requests in a timely fashion
- Price that is commensurate with the value offered by the company and ability to work within a budget
- Responses are clear, organized, creative, and logical
- Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Demonstrated detailed-oriented results
- Past performance working with an LSC funded project (if applicable)
- Past performance working with BALS (if applicable)

TERMS & CONDITIONS

Ownership of Materials and Confidentiality. All work done for the project and content will be owned by BALS, its successors and assigns. BALS, its successors and assigns, will have full access to and have the right to customize all outreach materials. The contractors will sign a confidentiality agreement with BALS before the engagement starts.

Costs of Preparing Responses. BALS will not pay any vendor costs associated with preparing responses submitted in response to this RFP.

Responses Property of BALS. All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of BALS and will not be returned.

Proprietary Information/Public Disclosure. All responses received shall remain confidential until the evaluation is completed, and the vendor is selected and approved.

RFP Amendments/Cancellation/Reissue/Reopen. BALS reserves the right to change the RFP Schedule or issue amendments to this at any time. BALS also reserves the right to cancel or reissue the RFP.

Minor Administrative Irregularities. BALS reserves the right to waive minor administrative irregularities contained in any response.

Inability to Enter Contract. BALS reserves the right to eliminate from further consideration any vendor that BALS, because of legal or other considerations, is unable to contract with at the time responses are due.

No Obligation to Enter a Contract. The release of this RFP does not compel BALS to enter any contract.

- BALS reserves the right to refrain from contracting with any vendor that has responded to this RFP whether or not the vendor's response has been evaluated and whether or not the vendor has been determined to be qualified. Exercise of this reserved right does not affect BALS' right to contract with any other vendor.
- BALS reserves the right to request an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.

Non-Endorsement. The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to BALS in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of BALS.

Contract Payment Limitations. To be negotiated.

ATTACHMENTS

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Project Narrative

1. Need for the project

Drafting documents is time-consuming and tedious work, yet each one plays a vital role in solving a client's legal issue.

As is true for many legal aid organizations, our legal staff – advocates, paralegals, and administrative assistants – have long been tediously filling documents, transferring information from various sources client by client to complete required paperwork. As a result of LSC's TIG projects and other resources, BALS has been aware of new technologies to address efficiencies in document production and business process management issues specific to legal assistance. These are issues that quietly affect both staff and clients daily at legal aid organizations, and significant progress has been made through TIG projects across the country – addressing a firm's intake process, for example, or pro se operations.

BALS has identified a need to look inward to make a major shift in our ways of doing business to improve the delivery of services as our client applications and staff have grown significantly in the past three years. Currently, BALS serves low-income residents of five fast-growing counties in the Tampa Bay area, annually handling more than 58,000 inquiries by phone or online. In each of the past two years, our staff assisted more than 16,000 applicants (2018, 2019). Last year, the firm helped approximately 17,600 individual families and community groups – including more than 4,500 senior clients, 3,300 clients with housing problems, 1,200 veterans, and 400 domestic violence survivors. Each of these individuals and each case required not only attention and expertise but also involved one or more individualized documents.

In 2018, the firm hired a full-time business process improvement (BPI) and project manager to address the firm-wide need for accelerated modernization and automation of both internal and outward-facing “paperwork” and processes. This TIG grant is part of BALS' ongoing BPI initiative, which has the attention, endorsement, and commitment of the firm's executive and management leadership, including our fourteen “teams” and their managing attorneys or project managers (Team Leaders). Now more than ever, COVID-19's relentless grip on Florida has abruptly made us change how we work together and has revealed BPI to be crucial: we need smart, agile systems based on design that has staff buy-in for a culture of continuous improvement that reflects an established culture of caring, a focus on maximum value-added service to clients. This TIG proposal will fund a two-tiered in-house project designed to improve BALS' operational efficiencies and effectiveness in the communities we serve – ultimately to better serve our rapidly expanding client populations and their rapidly deepening issues.

The proposed Project Lead for this TIG, our BPI/Project Manager David Gray, will work directly with our teams' advocates and staff to identify and automate their most commonly used documents, to enable more efficient and effective uses of advocates' time. For example, a form that takes 30 minutes to draft in its current state may take less than five after implementing a document assembly system and BPI – this is the performance gap we seek to solve. Our advocates will spend less time (redundantly) drafting documents for thousands of clients, freed to concentrate on providing high-quality services to each. Using the process improvement method DMAIC (Define, Measure, Analyze, Improve, Control), the Project Lead will work with BALS advocates and staff to improve the client document creation process. Using a collaborative and firm-wide approach, BPI aims to identify and resolve the root cause of current process issues, create high-impact and long-lasting change, and integrate a firm-wide commitment to a continuous process improvement culture.

By freeing up advocate time and firm resources, we can add value where the organization needs it most – improving client service. We seek an improved document assembly system with a measurable impact on

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the firm: eliminating time wasted in the current document creation process, improving service quality, increasing capacity to serve more clients. We are confident that administrative tasks such as transferring information and filling out documents are a drag on our ability to serve clients. Less time spent on tasks that can be automated and easily integrated into our systems will translate into more time spent on client legal matters. This project will borrow from and build on precursor TIG models, and we intend to become an added resource for other legal aid organizations seeking internal efficiencies that improve client outcomes. COVID-19 has sharply focused project urgency.

In our TIG plans, BALS advocates and staff are the ones identifying and implementing the improvements. BALS advocates and staff have expressed their frustration with a number of the operational bottlenecks in documentation and related processes that this project seeks to address. Crucially, to the degree that their participation contributes to the changes made, they will feel invested and more likely to ensure the project succeeds – a core value at BALS and a critical component in the success of most corporate culture changes. The project’s BPI assessment process and hands-on team involvement will enable our staff to have a complete understanding of how a task or function is performed at all levels of the firm, allowing advocates and staff to understand their work better individually and as a team, to simplify and improve their own processes, identify new processes to be improved, implement technology to enhance their work, increase adoption of new practices and technology, and ultimately reduce costs. All of this will be undertaken within the context of serving more clients, better.

This project offers two rare features. First, most document assembly projects to date focus on external use by pro se litigants. BALS is focusing its efforts internally. In order to provide the best possible document assembly system for external constituencies and purposes, we must first understand, evaluate, and optimize an internal process that benefits our clients. Second, while many legal aid organizations may devote part of a staffer's time to process improvement or a TIG project, David Gray is a full-time in-house BPI expert who reports to the COO with the primary focus of BPI and project management. He will lead the TIG project and BPI initiatives at the firm, educate and train staff, and work continuously to create a collaborative firm-wide culture of continuous improvements.

BALS enjoys the advantage of having a full-time BPI/Project Manager, whom leadership will free to spend 75% of his time for two years as Project Lead on this technology innovation and improvements project. Although this is not explicitly a replication project, our designated Project Lead has already proactively reached out to other projects to inform our thought process and project design, and we hope that in turn what we learn will be of use to many other legal aid organizations, replicable in relevant details and scale. As the project progresses, our Project Lead will call on the expertise of six process, project, and technology experts he has enlisted as project mentors and collaborators to advise the project in our efforts to design a high-efficiency document assembly system, launch it, and modify it as we implement changes firm-wide. Ultimately, BALS intends that David Gray will be a resource for other legal aid organizations, helping them learn from the challenges we encounter and adapting our project’s virtues in service to their clients.

BALS will implement system-wide internal improvements partly in response to staff-generated issues and their vision that their time and energy can be more efficiently employed to serve their clients better – our core mission. An appreciation of the importance of this mission and project is indicated by letters of support from the region’s United Way Suncoast (five counties) and Hillsborough County’s Senior Connection Center (administrates funding for our Senior Advocacy Unit); these and other community-based organizations count on BALS as the region’s only comprehensive legal aid organization serving the low-income residents we all value. The project’s technical changes and corresponding shift toward continuous improvement will further LSC’s goals of putting technologies to use to increase access to justice for our low-income clients.

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2. A full description of the project, including the specific technologies the project will develop or implement

Especially under Florida’s continuing COVID-19 crisis, which has not stopped but often has complicated legal issues for many low-income residents, BALS seeks to update, integrate, and streamline internal document assembly to free our legal teams to serve more clients more efficiently and more effectively. We will adapt elements of other TIG projects that fit our systems and objectives, with direct input from model legal aid staff and other content experts, and we intend to produce results that contribute to LSC’s body of replicable best practices in technological innovations.

This 2-year project proposes an internal system-wide implementation of best practices involving two elements crucial to technological and operational efficiencies: (1) document assembly and (2) business process improvement (BPI). David Gray, BALS full-time BPI/Project Manager, will devote 75% of his time as the Project Lead to work throughout the 24-month TIG project period in partnership with firm advocates and staff, legal community collaborators, and technical mentors to achieve project objectives. Our project is unusual because the Project Lead is an experienced BPI professional, a full-time BALS employee focused year-round on BPI. Additionally, our project's scope is to institutionalize system-wide internal improvements that potentially benefit thousands of clients across many types of legal needs rather than focus on one particular BPI target, such as improvements to an outward-facing pro se operation. During the project period, David Gray will attend several trainings himself and will be working with six colleagues who have agreed to serve as mentors, informal consultants, and collaborators to inform the project. He will also welcome and supervise an Access to Justice Tech Fellow, who will be integrated into project activities.

(1) Document Assembly and Automation

BALS will implement a firm-wide document management system, creating a centralized location, process, and procedure to access, create, and utilize client and court documents (forms, pleadings, letters, etc.). A required all-staff training in October will ensure that BALS employees are familiar with our TIG goals and objectives, and why firm-wide adoption of document automation is important to the organization’s mission and our clients. Once document storage and processing are centralized, the project will employ document assembly software Community.Lawyer to create templates and workflows that automate the document creation process. We will integrate Community.Lawyer with our case management system (CMS), LegalServer, so that various fields within the document will be populated with client case information already available in the CMS. This is a significant timesaver with every individual document and, over time, it will quickly pay off in more time and effort available for direct services to each client.

As part of this document automation process, BALS’ Project Lead has enlisted the assistance of Gregory T. Armstrong, Practice Group Director/Consumer Team for Inland Counties Legal Services (California). BALS and ICLS have a common goal in their 2020 LSC TIG projects: to connect document assembly software (i.e., Community.Lawyer) with LegalServer through a database integration API – to make the production of client and court documents as easy and efficient as possible for advocates and staff. Our two firms share the premise that improved process will free up advocate and staff time and firm resources, so the organizations can add value to where it matters most – improving client service.

Project Lead David Gray first will work with BALS staff and advocates individually and in small groups (anticipated to be part of regular team meetings in person and/or via Zoom) to identify priority documents to automate. Out of these meetings and direct staff feedback, the project’s next step will be to develop new document templates and improved workflows. Project Lead will work with document assembly software and case management software vendors to establish systems integration, and subsequently will conduct usability testing and make modifications based on advocate and staff feedback.

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All applicable staff will receive training on the use of the project’s new automated documents and will provide feedback through surveys or interviews. These new processes will be assessed, and an analysis of the document automation project results and potential for replication will be published.

(2) Business Process Improvement (BPI)

Through ongoing and transparent use of BPI, this TIG project is intended to create a core culture of continuous improvement embraced by staff as key stakeholders – to serve our thousands of clients better. This goal aligns directly with BALS’ strategic plan and stated mission of increasing access to justice – a prime value for LSC as well. In line with LSC’s goals for TIG awards, our TIG project will embed in BALS’ daily operations the emerging technologies and related best practices these grants encourage to improve legal aid services and client outcomes.

BALS will implement coordinated BPI activities to accomplish this project through staff education, individual and team training, and BPI pilot projects such as pro bono attorney engagement, advocate timekeeping, and staff onboarding to gain trust, adoption, and buy-in by all staff and advocates, and pro bono volunteers. BALS has committed to this path by employing a full-time BPI/Project Manager with the understanding that changing internal processes through new technologies requires time and focus to stand up and sustain the staff buy-in that makes these systems work. Often, without this fundamental staff involvement, organizations’ technology solutions go ignored or underutilized – full staff engagement and adoption of newly-introduced technologies are of central importance to BALS.

The project’s first BPI objective is firm-wide BPI education/training. Project Lead David Gray will create BPI training materials based on his professional BPI training experience and best practices within the legal aid community. He will meet with BALS teams (based on office locations and/or programs) to educate/train advocates and staff on BPI practices. Participating advocates and staff will provide feedback through surveys or interviews, which the Project Lead will use for project analysis and improvements.

Next, we identify two hands-on BPI pilot projects. BPI meetings with teams and individual staff will generate targets for hands-on BPI pilot projects. Project Lead David Gray will work with advocates and staff on these two hands-on pilots and implement new BALS processes based on the project outcomes.

All applicable staff will get training on the new BPI processes and again, participating advocates and staff will provide feedback through surveys or interviews, which will be used to inform the project and BALS process designs. The new BPI processes will be assessed, and an analysis of pilot project results and potential for replication will be published.

Both of these project initiatives will incorporate periodic internal evaluation (i.e., staff/participant surveys, interviews, database outputs) and be part of the formal external evaluation at the project’s end. Interim feedback responses and project analyses during implementation will be applied to improvements along the way and will be part of ongoing project transparency.

As indicated in the project budget, BALS has secured the pro bono participation of six highly-qualified professionals, including one Board member, willing to act as mentors or collaborators whose related experience and diverse perspectives we will leverage for the proposed project: Catherine Alman MacDonagh, Founder and CEO at Legal Lean Sigma Institute, a legal process improvement and project management consulting and training firm; Peter Hitson, Director of Legal Project and Practice Management at Carlton Fields, an Am Law 200 firm and BALS supporter; Ben Macre, VP & General Manager at GA Telesis MRO Services, a global aviation maintenance company; Jeff Cox, BALS Board member and Director of Content and Data Acquisition at UniCourt, a legal technology company; Joseph

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Schieffer, Founder and Project Manager at A2J Tech, an access to justice technology company; Ilenia Sanchez-Bryson, CIO at Legal Services of Greater Miami, a fellow legal aid and BALS collaborator; and Amy Burns, Deputy Director at Florida Rural Legal Services, a fellow legal aid and BALS collaborator.

Working internally and with these external collaborators, this TIG project aspires to create important firm-wide changes in work culture and applied technologies. We intend that BALS' diverse staff of 130-plus (approximately one-half are attorneys) will serve as an excellent test case for other legal aid organizations of any size looking to do the same. Project-related information and materials will be made available via multiple platforms, and the Project Lead's role includes serving as a resource to other legal aid organizations during and after the project period.



**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

Contact person: David Gray
Email address: dgray@bals.org

Phone number: 813.232.1222, ext. 214

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)

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)

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)

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