WORKSHOP ON TOOLS FOR SELF-ASSESSMENT OF PROJECTS FUNDED BY THE DC BAR FOUNDATION
OCTOBER 1, 2009
MATERIALS

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SELF-ASSESSMENT TOOLS
AN OVERVIEW
2009

Introduction

This describes a set of tools which can be used by the Public Funds Grantees of the DC Bar Foundation and others to assess the effectiveness of their projects. Self-assessment is an integral part of the Bar Foundation's evaluation program to assure the efficient and effective use of public funds, and each grantee is expected to assess the degree to which it has accomplished its intended objectives in funded projects. These tools will also be helpful for other processing other projects that are not funded by DC Public Funds.

Although specific objectives were not clearly stated by all the funded projects, several common objectives could be discerned among them. The broad common objectives identified were:

1. To increase awareness of legal rights by low income persons;
2. To train agency personnel in aspects of a lot related to their service to low-income populations;
3. To make representation available in new locations or to previously underserved populations;
4. To accomplish changes in systems, practices and policies which adversely affect low-income persons and communities;
5. To accomplish specific, identified outcomes for persons represented;
6. To established collaborative relationships with other organizations providing services to the low-income population.

These tools are designed to measure the accomplishment of most of these broad objectives. Five tools have been developed:

- Tools to assess the effectiveness of community education presentations to increase the awareness of legal rights;
- Tools to assess the effectiveness of training of agency personnel;
- Tools to assess the effectiveness of efforts to establish collaborative relationships with other social service agencies; and
- A tool to assess the degree of satisfaction with service and with the outcomes accomplished as a result of the services provided by the grantee.

- Guidelines to assessing whether intended outcomes have been accomplished, including the results of systemic work;

Most of these tools are available online. The majority are templates for online or hard copy surveys.. They can also be used as a framework for in-person or telephonic interviews. They are written with the expectation that they will be adapted to the specific objectives of each of the projects. It is not expected that each grantee would use all of the tools, but rather could choose one or two that measure accomplishment of the objectives which are of greatest importance to the grantee.

1. EVALUATIONS OF TRAINING OF AGENCY PERSONNEL AND COMMUNITY EDUCATION PRESENTATIONS

These two tools are similar in design and structure, since they are aimed at helping grantees assess two different kinds of training: 1) training agency personnel; and 2) community education presentations. Agency personnel training is likely to be focused on a small audience to teach them about legal rights and responsibilities of persons whom they serve, or in how to assist those persons with legal problems or related social problems. Community education is often aimed at a larger audience, and designed to teach individuals about their legal rights and responsibilities and with some issues, the steps they can take to help themselves. Nevertheless, both involve teaching, and the mechanisms for assessment is the same in both. There are differences in the language in each tool to reflect the intended audience in each.

These tools are surveys that are designed to be conducted online, but may be administered in hard copy handed out during or at the end of the session. The survey should first be edited and tailored to your needs in SurveyMonkey. If you want to use a survey in hardcopy it should be printed using the "Print Survey" function in SurveyMonkey. To make certain that the pagination is appropriate, you may need to print the survey as a PDF file and convert it to a wordprocessing file for final editing.

Three surveys are part of this portion of the toolkit. Two are general surveys for use at the end of either a training of agency personnel or a community education session. The third is a template for follow-up for either training or community education. Each survey has general instructions for its use on the introductory page. That page should be deleted in the final survey which is used.

The general surveys are divided into two sections. The first section solicits a general rating by participants of the content and presentation of the event. It also asks for an assessment of issues such as the quality of the facilities, food and refreshments and the length of the training or education section. These items may be relevant only in a few situations, and the pages and their questions can easily be deleted within SurveyMonkey in order to tailor the survey to your particular needs.

The second section asks about what was learned in the training by participants, and gives you an opportunity to determine if your learning objectives were met. It also asks about skills that were learned in the training and gives you an opportunity to determine whether skills you intended to impart were in fact learned. It is good practice to be clear at the outset of a training about what your learning objectives are. Clarity of objectives provides the basis for focus, selection of trainers and a variety of other aspect of the training. It also provides immediate focus for an evaluation of the training, since you can simply state the learning objectives, and ask how well they were met met.[1]

Being less specific, questions can be asked about the degree to which information was learned which will be of use to participants in their work. It is possible to ask a more open ended question such as, "What was the most important thing you've learned in this training?" Is preferable, however, to have a clear idea of what you hope is learned and to ask specifically about that.

The follow-up survey is designed to be used 3 to 6 months following the training or education session and contains questions pertaining to the results of the event and the degree to which the learning and skills have made a difference. Sometimes the most useful information regarding a training is what the results of the training has been. It is also the most difficult to measure. The more specific the objectives are for training, the more easily you can evaluate the results. Thus, for instance, if the intent of the training was to teach agency personnel to help people *successfully* apply for a government benefit, a follow-up assessment to determine the number of instances of help having been given and the percentage of success in such efforts will directly answer the question.

2. CLIENT SATISFACTION ASSESSMENTS

This tool is relatively easy to administer and can be easily tailored to inquire about various aspects of a program or its operation. The information obtained is relatively easy to collate and interpret and can readily be used in reports and other such documents.

There are two principal drawbacks of client satisfaction assessments. First, typically there are relatively low response rates, so the validity of the data may not be high. *(Does the degree of satisfaction itself affect the extent to which persons served are likely to fill out a satisfaction survey?)* Second, such assessments generally solicit the respondents' subjective perceptions and may not be a good indicator of the actual quality or effectiveness of the services provided. *(A client may lose a case with top-notch representation, and may win one with lower quality effort.)*

[1] For example, the objective was for participants to gain a basic understanding of the circumstances in which a bank might be more inclined to renegotiate a loan and whom to contact to start such a process. Question: How well did we accomplish that objective?

Notwithstanding these drawbacks, client satisfaction assessments can obtain a wide range of information that may be useful to a program. Client satisfaction surveys can focus on specific stages of the individual's interaction with the program as well as aspects of the representation.

- They can, for instance, measure applicants' experience in the process of intake, screening and case acceptance. *(Were they treated courteously by program's reception staff, in person or on the phone? Were they accurately informed of the length of time required for key steps in the process— eligibility screening, substantive interview, disposition of their application and referral to assistance?)*

- They can also assess important aspects of representation. *(Did the advocate keep them adequately informed of the progress of the case? Did the advocate adequately inform them of options in the case and provide them an opportunity to determine the objective?)*

- They can assess whether the client was satisfied with the outcome in the case, even though that is not necessarily a measure of quality or if the best outcome possible was, in fact, obtained.

- They can assess the degree to which pro se clients felt that they had obtained sufficient information to represent themselves and to be successful. *(Were they adequately informed of the steps they need to take for self representation and how to proceed? Were they successful?)*

- They can assess satisfaction with partner agencies or entities, particularly where such information might affect how the evaluating organization provides assistance and referrals. *(Were they satisfied with the assistance provided by an agency or organization to which they were referred? Did the agency or organization addressed the problem for which they start assistance?)*

Instructions for editing the survey.

The client satisfaction survey asks many more questions than is likely to be necessary or appropriate. It asks questions in a broad range of areas, and should be reduced to a smaller number directly pertinent to areas about which you seek data.

3. COOPERATIVE AND COLLABORATIVE RELATIONSHIPS WITH COMMUNITY AGENCIES AND ORGANIZATIONS

Nearly every recipient of a public funding grant identified establishing or improving collaborative ands cooperative relationships with other service providers as one objective of their project. In spite of the admittedly subjective nature of the objective, this tool offers a simple survey or interview to assess the degree to which new or improved collaborative relationships have in fact been established in the course of the project. It provides an opportunity to identify problems in a relationship with a collaborating organization that may undermine the success of a project.

The best way to find out how a relationship is working is to ask the people involved. The community partner survey or interview process ensures that project leaders pay attention to the needs of the partners. In addition, the tool may create an opportunity for interchange with the collaborating organization about how well the project is working and about opportunities for improving it.

The specific questions asked of collaborating organizations may vary considerably according to the nature of the project and the role that the other agency plays. The survey/interview template offers sample questions, but you should develop your more specific questions. The nature of the question may vary depending on what you wish to find out. You may wish, for example, to ask questions about specific efforts undertaken to collaborate. Or you want to find out the degree to which the agency is familiar with the project and understands it. Finally, you may wish to inquire about the collaborating agencies' view of the effectiveness of the project and suggestions for improving it.

This tool is designed as an on-line survey, but can be used as a template for a telephone or in-person survey in as needed.

4. Assessment of Outcomes

Outcome evaluations

An *outcome evaluation* assesses the extent to which a project achieves its objectives and measures the results achieved. Increasingly, in social services circles, including the legal services community, funders are focusing on outcome measures as a way to demonstrate the value of the services they are funding. There is a concomitant increase in the use of such measures to inform managers of the effectiveness of their program's work.

It is important to distinguish between *outputs*, that is, the units of service that are produced by the project, from *outcomes*, which are its intended and unintended results. The focus of an outcome evaluation is on meaningful results. In the past, it was often sufficient for a grantee to report outputs; that is, service delivery numbers, such as how many people were served, how many trainings were held, how many referrals were made, or how many hits there were on a website. Increasingly, managers— and funders—want to know what changed for the people who were represented, trained or referred. Or, stated another way: Did the project succeed in making a meaningful difference for the people it was designed to serve?

The reason for the shift seems obvious. Knowing the number of persons given advice about how to respond to a particular problem (outputs), for example, is much less valuable for understanding a project's success than knowing whether the individuals were actually able to use the advice and were successful addressing their problem (outcomes).

There are a number of approaches to outcome evaluations that make them manageable in terms of cost, validity and ease of use. There is a range of potential outcomes which an evaluation can measure along a continuum of results that might be measured. Some are short-term, some intermediate, and some are long-term. Short term and intermediate outcomes involve relatively easy things to measure. Long-term outcomes may be the most instructive to management regarding the actual effectiveness of the program's work, but they are trickier to assess.

Measuring short term outcomes involve relatively simple questions, such as those related to access to the service. (*Did clients learn of an available service and were they able to access it? Did clients actually use the service? Did the client understand the information or advice provided?)* The client satisfaction tools discussed in this overview may, to the degree that they ask about the client's satisfaction with the results, be considered as instruments to measure short-term outcomes. They obviously do not, however, measure the actual results accomplished for persons using the service.

Intermediate outcomes, on the other hand, involve such questions as: Did the client do anything as a result of the service? What result was the program able to accomplish in the representation? (… delaying or avoiding an eviction? … obtaining repairs to an out-of-code apartment? … obtaining a restraining order?) One of the tools provides examples of others' instruments which are designed to capture outcomes in individual cases at the time the case file is closed. [This tool is being developed, but an example will be demonstrated in the workshop.]

Longer term outcomes include such questions as: Did the action taken produce any change in the client's situation? Was the change in the client's situation a positive one from the client's perspective? Was the client's goal achieved? Was the outcome for the client "just" from the standpoint of knowledgeable legal observers? Was there a long-term impact on the client's life?

	Short-term outcomes ——→					
Point on the continuum	Learning of the service	Accessing the service	Using the service	Client education	Client education	Client actions
Broad evaluation questions	Did people in need learn of the service?	Were they able to access it?	Did individuals in need receive services that they sought?	Did the individual understand any advice or information provided?	Were the client's expectations about the likely outcome of the matter changed?	Did the client take appropriate action as a result of the service?

	Intermediate outcomes →			
Point on the continuum	Client outcomes	Client outcomes	Client outcomes	Client outcomes
Broad evaluation questions	Did the action taken by or for the client produce any change in the individual's situation?	Was the change in the client's situation a positive one from the client's perspective?	Was the client's objective achieved?	Was the outcome for the client "just" from the standpoint of knowledgeable legal observers?

	Long-term outcomes →			
Point on the continuum	Client impact	Systemic impact	Impact on courts and other agencies	Other outcomes
Broad evaluation questions	What was the impact of the outcome on the client's life?	Were the intended results in systemic work (e.g., changing a policy or practice that adversely affects low income communities)	Did the service or outcome have an impact on other agencies or entities?	Were there other intended or unexpected long-term changes

A description of outcome assessment approaches

There are a variety of ways to measure outcomes along the continuum of possibilities described above. This overview discusses two:

Collection of outcomes at case closing. The process for collecting outcome that case closing is relatively straightforward, although setting up the system can consume significant time. Outcomes at case closing are expressed in terms of relatively generic substantive outcomes typical for each specific type of case or representation. Thus, for example, possible outcome codes for health benefits drawn from one public grantee might be:

- Obtained, preserved or increased Medicare benefits/rights;
- Obtained, preserved or increased Medicaid benefits/rights;
- Obtained or preserved health insurance;
- Stopped, or obtained redress for discriminatory medical treatment;
- Obtained, or enforced terms of health or disability insurance;
- Obtained brief advice, information and referral on a health matter;
- Obtained counseling services on a health matter.

Options that might be applicable for eviction cases could include:

- Prevented eviction from private housing;
- Delayed eviction providing time to seek alternative housing;

- Avoided, or obtained redress for, charges by landlord;
- Overcame denial of tenant's rights under lease;
- Obtained repairs or otherwise enforced rights to decent, habitable housing.

The key to setting outcomes to be measured is to identify those which matter to you. They should reflect what you believe are important outcomes for clients, which you believe it will be important to record. How they are framed, in part, may reflect the purposes for which you are collecting the data. You may wish, for instance, to demonstrate to a funder the benefit of the work they support, for purposes of continuing or expanding a grant. You may wish to measure whether your efforts have met certain benchmarks, in order to determine whether your approach is successful and cost effective. You may wish to motivate staff to increase the degree to which it is accomplishing certain intended outcomes. Or, you may wish to measure the degree to which systemic work has changed policies and practices in a way which affects outcomes for clients in multiple ceases.

Follow-up to measure long-term outcomes. There may be circumstances where it is important or valuable to measure the long-term impact of a project. Some projects may, because of the nature of the issue, identify long-term results that are sought for clients in each case. Domestic violence projects, for instance, may identify an objective of helping its clients establish a stable and safe environment for herself and her family. A short-term case outcome of obtaining a restraining order, therefore, would not indicate whether the project had been successful in accomplishing its intended objective. Similarly, an employment project might find that a short-term outcome of helping a client reinstate a suspended driver's license did not necessarily signal accomplishment of an intended goal of helping the individual obtain and keep a job.

Legal aid programs often are satisfied with measuring and reporting short and intermediate term results, and do not inquire regarding the accomplishment of long-term objectives. In many cases, that does not matter. But in others it can be critically important. The expenditure of funds to obtain hundreds of restraining orders may not be a good use of funds, if a high percentage of the women assisted end up back with their abuser, because they have no income or shelter. Similarly, some eviction projects have begun to inquire whether they have succeeded in stabilizing clients' access to shelter, if the fundamental problem is lack of income to pay rent with the result that the client is churning through multiple eviction processes.

Several observations should be noted.

- The more specific the program is about the intended long-term objectives of its work, the more easily it can focus a short follow-up interview on information which will be useful to it. Thus, for example, in the example of an employment project, if the stated objective of the project is to assist people to obtain and retain employment, following up six months later to determine the number of persons who are still employed may be very instructive about the long-term success of the project.

- Keep it simple; only ask about objectives that you truly care about and gather only data that you can and will use.

- Do enough to answer the questions that matter to you; the standard is not scientific validity, but acceptable credibility for you to make future decisions about how a project operates and to demonstrate to your funders the long-term value obtained through their investment.

The attached chart entitled Measuring Short and Long-Term suggests a variety of techniques which might be used to measure the accomplishment of some of the short and long-term outcomes stated or implied by the grant applications and reports submitted for Public Funds Grants of the DC Bar Foundation.

DC Bar Foundation Template - Training

1. INTRODUCTORY PAGE

THIS PAGE SHOULD BE EDITED TO REFER TO THE TRAINING YOU ARE EVALUATING. ADD OTHER INFORMATION THAT YOU DEEM APPROPRIATE, SUCH AS EXPECTATIONS REGARDING CONFIDENTIALITY, THE DATE BY WHICH YOU WOULD LIKE TO SURVEY TO BE COMPLETED, AND THE LIKE.

THE FOLLOWING PARAGRAPHS ARE INSTRUCTIONS FOR SETTING UP YOUR SURVEY AND SHOULD BE DELETED FROM ANY SURVEY YOU CREATE.

Please note that you can create a hard copy of this survey by clicking on the link "Print Survey."

This is a survey to solicit reactions to a training of agency personnel which you have conducted. It is divided into two sections.

The first section solicits a general rating by participants of the content and presentation of the event. It also asks for an assessment of issues such as the quality of the facilities, food and refreshments and the length of the training or education section. These items may be relevant only in a few situations, and the pages and their questions can easily be deleted within SurveyMonkey in order to tailor the survey to your particular needs.

The second section asks about what was learned in the training by participants, and gives you an opportunity to determine if your learning objectives were met. It also asks about skills that were learned in the training and gives you an opportunity to determine whether skills you intended to impart were in fact learned.

A separate follow-up survey which can be administered 3 to 6 months following the training contains questions about whether the learning and skills made a difference and have had a positive result. [See, DC Bar Foundation Template - Training or Community Education Follow-up.]

This survey is designed to be conducted online, but may be administered in hard copy handed out during or at the end of the session. The survey should first be edited and tailored to your needs in SurveyMonkey, and then printed using the "Print Survey" function.

DC Bar Foundation Template - Training

2. Section One - General Reactions: Content and presentation

1. Overall, how would you rate the training?

- Excellent
- Above average
- Average
- Fair
- Poor

2. What did you like most about the training?

3. What did you like least about the training?

DC Bar Foundation Template - Training

3. Section One - General reactions: Trainers

1. Overall, how would you rate the presenters and trainers?

- Excellent
- Above average
- Average
- Fair
- Poor

2. Please, indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The presenters and trainers were prepared and knew their subject matter.						
The presenters and trainers effectively communicated their subject matter to the audience.						
The presenters and trainers effectively engaged participants in discussion of the subject matter.						

Comments

DC Bar Foundation Template - Training

4. Section One - General Reactions: Materials

1. How would you rate the materials?

- Excellent
- Above average
- Average
- Fair
- Poor

2. Please, indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The materials were clearly written and presented.						
The materials fully covered the subject matter of the training.						
The materials will be useful to me following the training.						

Comments

DC Bar Foundation Template - Training

5. Section One - General Reactions: Optional Inquiries

THIS SET OF QUESTIONS IS LIKELY TO BE USED ONLY INFREQUENTLY. IT CAN BE USEFUL, HOWEVER, IF YOU ARE TRYING TO DECIDE ABOUT POSSIBLE CHANGES IN THE LOCATION, LENGTH, OR FREQUENCY OF TRAINING AND WOULD LIKE FEEDBACK.

1. How would you rate the following?

	Excellent	Above average	Average	Fair	Poor	Not sure
The facility where the training took place						
Ease of access						
Ease of parking						
Food and refreshments						

YOU MAY WISH TO ADD OTHER ITEMS ABOUT WHICH YOU WOULD LIKE FEEDBACK, SUCH AS TRANSPORTATION, LENGTH OF TRAINING, FREQUENCY, ADDITIONAL TRAINING TOPICS, AND THE LIKE.

2. Comments

6. Section Two — Substantive and Skills Learnings

SURVEY DEVELOPMENT INSTRUCTIONS:
MANY TRAINING EVALUATIONS FOCUS PRINCIPALLY ON PARTICIPANTS' REACTION TO THE TRAINING OR PRESENTATION, BUT DO NOT INQUIRE ABOUT SUCCESS IN ACCOMPLISHING THE OBJECTIVES OF THE TRAINING REGARDING WHAT IT SEEKS TO TEACH, EITHER IN TERMS OF INFORMATION IMPARTED OR SKILLS TAUGHT. THE FOLLOWING PAGES APPROACH LEARNING OBJECTIVES FROM TWO PERSPECTIVES:
1) GENERAL QUESTIONS REGARDING LEARNING AND SKILLS OBJECTIVES, AND
2) QUESTIONS REGARDING SPECIFIC LEARNING AND SKILLS OBJECTIVES.

DC Bar Foundation Template - Training

7. Section Two - Substantive Learnings: General Inquiries

1. Please indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The information presented was relevant to me						
The information presented will be useful to me						
The information was presented in a way which helped me to learn and remember it						

2. What was the most important thing you learned from the training?

3. What suggestions do you have for our improving how we convey information to persons whom we train?

DC Bar Foundation Template - Training

8. Section Two - Substantive Learnings: Specific Inquiries

IF YOU ARE INTERESTED IN WHETHER THE RESOURCES SPENT TRAINING OTHERS ARE COST-EFFECTIVE AND IF THE TECHNIQUES YOU HAVE USED TO TEACH ARE SUCCESSFUL, YOU MAY FIND IT HELPFUL TO ASK ABOUT HOW WELL YOU HAVE ACCOMPLISHED SPECIFIC LEARNING OBJECTIVES. QUESTIONS AT THIS LEVEL OF SPECIFICITY ARE MOST LIKELY TO BE BENEFICIAL WITH TRAININGS OF AGENCY OR COMMUNITY BASED ORGANIZATION PERSONNEL TO WHICH MAY REFER CLIENTS FOR ASSISTANCE AND WHERE YOU WISH TO BE CONFIDENT THAT THEY WILL BE EFFECTIVELY ASSISTED

1. Please, indicate the degree to which we were successful in teaching the following:

[THE FOLLOWING QUESTIONS REGARDING LEARNING OBJECTIVES ARE DRAWN FROM SEVERAL OF THE PUBLIC FUNDING GRANTS NAD ARE FOR EXAMPLE ONLY.
NOTE, THE MORE SPECIFICALLY YOU CAN STATE THE LEARNING OBJECTIVE, THE MORE USEFUL THE FEEDBACK WILL BE TO YOU REGARDING WHAT PEOPLE TRULY LEARNED IN YOUR TRAINING. BEING CLEAR GOING INTO THE TRAINING ABOUT THE SPECIFIC LEARNING OBJECTIVES WILL NOT ONLY ENHANCE YOUR CAPACITY TO ASSESS THE SUCCESS OF THE TRAINING, IT IS LIKELY TO IMPROVE THE TRAINING ITSELF.]

	Highly successful	Successful	Somewhat successful	Unsuccessful	Highly unsuccessful	Not sure
To teach participants the steps necessary to help to persons with mental illness who are being released from incarceration to obtain mental health resources and entitlements available to them						
To teach defense counsel and persons working with them what is necessary to assert accommodation claims under the Rehabilitation Act for persons with psychiatric disabilities						
And so forth						

9. Another example

1. This training was designed to teach you as a pro bono attorney about available immigration remedies for domestic violence survivors. Please, indicate the degree to which we were successful in teaching you how to use the following remedies:

[NOTE THAT THE FOLLOWING ISSUES LEND THEMSELVES TO A FOLLOW-UP SURVEY CONDUCTED AFTER A PRO BONO ATTORNEY HAS TAKEN A CASE IN THIS AREA, TO DETERMINE THE DEGREE TO WHICH THE TRAINING PREPARED THE ATTORNEY FOR THE REPRESENTATION UNDERTAKEN.]

	Highly successful	Successful	Somewhat successful	Unsuccessful	Highly unsuccessful	Not sure
VAWA Self-Petitions						
Battered Spouse Waivers						
U-Visas						
T-Visas						
Gender-based asylum claims						

2. We also sought to give you a better understanding of cultural competency issues when working with immigrant survivors of domestic violence. How successful were we?

[THIS ISSUE ALSO WOULD BE APPROPRIATE FOR A FOLLOW-UP SURVEY CONDUCTED AFTER A PRO BONO ATTORNEY HAS TAKEN A CASE IN THIS AREA, TO DETERMINE THE DEGREE TO WHICH THEY FELT THE CULTURAL COMPETENCY assisted them in their representation of the client.]

- Highly successful
- Successful
- Somewhat successful
- Unsuccessful
- Highly unsuccessful
- Not sure

Comments

3. What suggestions do you have for our improving how we teach about these issues?

DC Bar Foundation Template - Training

10. Section Two - Skills: General Inquiry

NOT EVERY TRAINING IS DESIGNED TO TEACH SKILLS, SO THIS SECTION MAY NOT BE PERTINENT IN MANY INSTANCES.

1. Please indicate the degree to which you agree with the following statements

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
I learned skills which I will be able to use to assist people whom I serve						
The skills were presented in a way which helped me to learn and remember them						

2. Please identify the most important skill or skills you learned from the training

3. Do you have suggestions regarding how we can teach skills more effectively?

DC Bar Foundation Template - Training

11. Section Two - Skills: Specific Inquiry

YOU WOULD GENERALLY USE EITHER THIS PAGE OR THE PREVIOUS ONE, NOT BOTH.

1. Our objective in this training was to teach you the following skills. Please, indicate the degree to which we were successful.

	Highly successful	Successful	Somewhat successful	Unsuccessful	Highly unsuccessful	Not sure
To assist HIV-positive persons to apply for and obtain public benefits to which they are entitled						
To assist HIV-positive persons to sign up for the Qualified Medicare Beneficiary program and to select the drug plan that best suits them						
And so forth						

Comment

2. Do you have suggestions regarding how we can teach these skills more effectively?

12. Thank you - You are done!

Thank you for your time and insights. They will be helpful to us in improving our future trainings.

DC Bar Foundation Template - Community Education

1. INTRODUCTORY PAGE

THIS PAGE SHOULD BE EDITED TO REFER TO THE COMMUNITY EDUCATION SESSION YOU ARE EVALUATING. ADD OTHER INFORMATION THAT YOU DEEM APPROPRIATE, SUCH AS EXPECTATIONS REGARDING CONFIDENTIALITY, THE DATE BY WHICH YOU WOULD LIKE TO SURVEY TO BE COMPLETED, AND THE LIKE.

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This is a survey to solicit reactions to a community legal education which you have conducted. It is divided into two sections.

The first section solicits a general rating by participants of the content and presentation of the event. It also asks for an assessment of issues such as the quality of the facilities, food and refreshments and the length of the training or education section. These items may be relevant only in a few situations, and the pages and their questions can easily be deleted within SurveyMonkey in order to tailor the survey to your particular needs.

The second section asks about what was learned in the session by participants, and gives you an opportunity to determine if your learning objectives were met. It also asks about skills that were learned in the community education session and gives you an opportunity to determine whether skills you intended to impart were in fact learned.

A separate follow-up survey which can be administered 3 to 6 months following the presentation contains questions about whether the learning and skills made a difference and have had a positive result. [See, DC Bar Foundation Template - Training or Community Education Follow-up.]

This survey is designed to be conducted online, but may be administered in hard copy handed out during or at the end of the session. The survey should first be edited and tailored to your needs in SurveyMonkey, and then printed using the "Print Survey" function.

DC Bar Foundation Template - Community Education

2. Section One - General Reactions: Content and presentation

1. Overall, how would you rate the community education presentation?

- Excellent
- Above average
- Average
- Fair
- Poor

2. What did you like most about the presentation?

3. What did you like least about the presentation?

4. Other comments

DC Bar Foundation Template - Community Education

3. Section One - General reactions: Presenters

1. Overall, how would you rate the presenters?

- Excellent
- Above average
- Average
- Fair
- Poor

2. Please, indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The presenters were prepared and knew their subject matter.						
The presenters effectively communicated their subject matter to the audience.						
The presenters effectively engaged participants in discussion of the subject matter.						

3. Comments

DC Bar Foundation Template - Community Education

4. Section One - General Reactions: Materials

1. How would you rate the materials?

Excellent Above average Average Fair Poor

2. Please, indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The materials were clearly written and presented.						
The materials fully covered the subject matter of the training.						
The materials will be useful to me later on.						

3. Comments

DC Bar Foundation Template - Community Education

5. Section One - General Reactions: Optional Inquiries

THIS SET OF QUESTIONS IS LIKELY TO BE USED ONLY INFREQUENTLY. IT CAN BE USEFUL, HOWEVER, IF YOU ARE TRYING TO DECIDE ABOUT POSSIBLE CHANGES IN THE LOCATION, LENGTH, OR FREQUENCY OF COMMUNITY LEGAL EDUCATION PRESENTATIONS AND WOULD LIKE FEEDBACK.

1. How would you rate the following?

	Excellent	Above average	Average	Fair	Poor	Not sure
The facility where the presentation took place						
Ease of access						
Ease of parking						
Food and refreshments						

YOU MAY WISH TO ADD OTHER ITEMS ABOUT WHICH YOU WOULD LIKE FEEDBACK, SUCH AS TRANSPORTATION, LENGTH OF SESSION, FREQUENCY, ADDITIONAL TOPICS, AND THE LIKE.

2. Comments

DC Bar Foundation Template - Community Education

6. Section Two — Substantive and Skills Learnings

SURVEY DEVELOPMENT INSTRUCTIONS:
MANY EVALUATIONS FOCUS PRINCIPALLY ON PARTICIPANTS' REACTION TO THE PRESENTATION, BUT DO NOT INQUIRE ABOUT SUCCESS IN ACCOMPLISHING ITS OBJECTIVES REGARDING WHAT IT SEEKS TO TEACH, EITHER IN TERMS OF INFORMATION IMPARTED OR SKILLS TAUGHT. THE FOLLOWING PAGES APPROACH LEARNING OBJECTIVES FROM TWO PERSPECTIVES:
1) GENERAL QUESTIONS REGARDING LEARNING AND SKILLS OBJECTIVES, AND
2) QUESTIONS REGARDING SPECIFIC LEARNING AND SKILLS OBJECTIVES.

DC Bar Foundation Template - Community Education

7. Section Two - Substantive Learnings: General Inquiries

1. Please indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
The information presented was relevant to me						
The information presented will be useful to me						
The information was presented in a way which helped me to learn and remember it						

Comments

2. What was the most important thing you learned from the presentation?

3. What suggestions do you have for our improving how we convey information in our presentations?

DC Bar Foundation Template - Community Education

8. Section Two - Substantive Learnings: Specific Inquiries

IF YOU ARE INTERESTED IN WHETHER THE RESOURCES SPENT IN COMMUNITY LEGAL EDUCATION PRESENTATIONS ARE COST-EFFECTIVE AND IF THE TECHNIQUES YOU HAVE USED TO TEACH ARE SUCCESSFUL, YOU MAY FIND IT HELPFUL TO ASK ABOUT HOW WELL YOU HAVE ACCOMPLISHED SPECIFIC LEARNING OBJECTIVES. (QUESTIONS AT THIS LEVEL OF SPECIFICITY ARE MOST LIKELY TO BE BENEFICIAL WITH TRAININGS OF AGENCY OR COMMUNITY BASED ORGANIZATION PERSONNEL TO WHICH MAY REFER CLIENTS FOR ASSISTANCE AND WHERE YOU WISH TO BE CONFIDENT THAT THEY WILL BE EFFECTIVELY ASSISTED.)

1. Our objective was to teach useful information with regard to the following issues. Please, indicate the degree to which we were successful.

[THESE LEARNING OBJECTIVES ARE EXAMPLES ONLY, DRAWN FROM THE PUBLIC FUNDING GRANT APPLICATIONS. THE LEARNING OBJECTIVES STATED ON THE LIST SHOULD BE YOURS. THE MORE SPECIFICALLY YOU CAN STATE THE LEARNING OBJECTIVE, THE MORE USEFUL THE FEEDBACK WILL BE TO YOU REGARDING WHAT PEOPLE TRULY LEARNED IN YOUR PRESENTATION. BEING CLEAR GOING INTO THE CLE ABOUT THE SPECIFIC LEARNING OBJECTIVES WILL NOT ONLY ENHANCE YOUR CAPACITY TO ASSESS THE SUCCESS OF THE EVENT, BUT EXPERIENCE TEACHES, IT IS LIKELY TO IMPROVE THE PRESENTATION ITSELF.]

	Highly successful	Successful	Somewhat successful	Unsuccessful	Highly unsuccessful	Not sure
To teach participants what is required under the DC Housing Code for rental apartments and other units						
To teach participants their rights in the event their apartment or other rental unit does not meet DC Housing Code standards						
To teach participants about the benefits of advanced directives and when they are appropriate						
And so forth						

Comments

DC Bar Foundation Template - Community Education

2. What suggestions do you have for our improving how we teach about these issues?

DC Bar Foundation Template - Community Education

9. Section Two - Skills: General Inquiry

NOT EVERY TRAINING IS DESIGNED TO TEACH SKILLS, SO THIS SECTION MAY NOT BE PERTINENT IN MANY INSTANCES.

1. Please indicate the degree to which you agree with the following statements

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Not sure
I learned skills which I will be able to use to assist people whom I serve						
The skills were presented in a way which helped me to learn and remember them						

Comments

2. Please identify the most important skill or skills you learned from the training

3. Do you have suggestions regarding how we can teach skills more effectively?

10. Section Two - Skills: Specific Inquiry

YOU WOULD GENERALLY USE EITHER THIS PAGE OR THE PREVIOUS ONE, NOT BOTH.

1. Our objective in this training was to teach you the following skills. Please, indicate the degree to which we were successful.

	Highly successful	Successful	Somewhat successful	Unsuccessful	Highly unsuccessful	Not sure
How to take the formal steps necessary to establish a Tenants Association						
How to testify before the City Council of the District of Columbia						
And so forth						

Comments

2. Do you have suggestions regarding how we can teach these skills more effectively?

DC Bar Foundation Template - Community Education

11. Thanks - The survey is complete

Thank you for your time and insights. They will be helpful to us in improving our future community education presentations.

DC Bar Foundation Template - Training or Community Education

1. Introductory explanation

In some instances, you may wish to follow up on the degree to which your training succeeded in accomplishing positive results, either for an agency's or community-based organization's personnel assisting low-income persons, or in individual helping themselves. Such an assessment may be useful in providing data to support a funding request for continuation or expansion of a project. It may also be of assistance in determining whether a project is successfully accomplishing the objectives for which it was designed. If it is not, a project might be altered to be more effective or in some cases, abandoned, so that resources can be allocated to a more successful strategy.
The following is for sample purposes only. If you wish to assess the results of your training and whether participants were able to use what you taught, the details should reflect the specific learning objectives of your training.

Pointers in developing your survey:

• Be as specific as you can regarding what you intended to teach. (The success of an objective such as, "To increase participants' understanding of their rights under landlord-tenant law," is hard to measure six months later, other than through a lengthy test or a subjective question. On the other hand, it is relatively easy to determine whether an objective was met such as, "To teach participants how to get a housing inspection when they encounter dangerous conditions in their rental unit."

• Note the distinction among 1) learning the intended lesson, 2) applying it by taking some action, and 3) getting a desired result as a result of the action. To measure fully whether your training was successful, you may find it important to ask about all three levels of outcomes.

• Following up on a training or community education presentation requires contacting participants 3 to 6 months after the events occurred. Creating a usable contact list can be a challenge, particularly in a large community education session. It is a good idea, therefore, to register participants with a form that gathers their contact information and advises them that you may contact them for follow-up information or an assessment.

DC Bar Foundation Template - Training or Community Education

2. Sample questions - Learnings

On June 19, 2009, you attended our training session on what to do to address dangerous housing conditions in rental units in the District of Columbia. It would help us a lot in future trainings, if you would answer the following questions about what you learned.

1. We wanted to teach you what to do if you have a dangerous housing condition in your rental unit including,
1) how to report the condition to the DC Department of Consumer and Regulatory Affairs (DCRA);
2) how to request your landlord to make repairs; and
3) how to get a housing inspection.

Please, tell us the degree to which you agree with the following statements:

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree
I learned what conditions or situations are a violation of the Housing Code in my apartment					
I learned what conditions or situations are a violation of the housing code in hallways, stairways, yards, parking lots and other common areas					
I learned what I need to do to prove a violation					
I learned what I need to do to tell my landlord about the violation and request repairs					
I learned how to ask for a housing inspection if my landlord does not make the repairs					

Comments

DC Bar Foundation Template - Training or Community Education

3. Sample questions - Actions Taken

It will help us to find out if you were able to use what you learned

1. Have you found conditions in your rental unit that you believe violate the DC Housing Code?

- [ ] Yes
- [ ] No

2. Did you take action to have it repaired?

- [ ] Yes
- [ ] No
- [ ] Not Applicable

DC Bar Foundation Template - Training or Community Education

4. Sample questions - Actions Taken (continued)

1. What actions did you take?

Check all that apply

- [ ] I made a complete list of all the violations
- [ ] I gathered physical evidence of the violations, like pictures and dead insects
- [ ] I sent a letter to my landlord requesting repairs
- [ ] I requested an inspection from the Department of Consumer and Regulatory Affairs

Other

2. Were you successful in obtaining repairs to the dangerous condition in your rental unit?

Yes   No

3. If not, what happened?

4. Comments

DC Bar Foundation Template - Training or Community Education

5. Sample questions - Actions Not Taken

1. What kept you from taking action?

Check the statement which most applies to you

- [ ] I wasn't sure what to do
- [ ] I didn't have time
- [ ] I intend to take action, but haven't been able to yet
- [ ] I didn't think the condition was serious enough
- [ ] I was afraid of what the landlord might do

Other (please specify)

2. Comments

DC Bar Foundation Template - Training or Community Education

6. Thank You

Thank you for answering these questions. It will be helpful to us in future trainings.

1. Do you have suggestions about how to improve our training?

DC Bar Foundation Template - Client Satisfaction

1. Introductory page

THE FOLLOWING PAGE IS WRITTEN TO PROVIDE GUIDANCE FOR SURVEY DESIGNERS AND SHOULD BE DELETED FROM ANY SURVEY CREATED USING THIS TEMPLATE. THE TEXT ON THIS PAGE CAN BE REPLACED IN ORDER, AMONG OTHER THINGS, TO EXPLAIN HOW THE INFORMATION SOUGHT WILL BE USED, TO EXPLAIN ISSUES SUCH AS CONFIDENTIALITY AND TO THANK RESPONDENTS FOR THEIR TIME AND THOUGHTS.

INSTRUCTIONS TO SURVEY DESIGNERS:

This tool is relatively easy to administer and can be easily tailored to inquire about different aspects of a program or its operation. The information obtained is relatively easy to collate and interpret and can readily be used in reports and other such documents.

There are two principal drawbacks of client satisfaction assessments. First, typically there are relatively low response rates, so the validity of the data may not be high. (Does the degree of satisfaction itself affect the extent to which persons served are likely to fill out a satisfaction survey?) Second, such assessments generally solicit the respondents' subjective perceptions and may not be a good indicator of the actual quality or effectiveness of the services provided. (A client may lose a case with top-notch representation, and may win one with lower quality effort.)

Notwithstanding these drawbacks, client satisfaction assessments can obtain a wide range of information that may be useful to a program. Client satisfaction surveys can focus on specific stages of the individual's interaction with the program as well as aspects of the representation.

• They can, for instance, measure applicants' experience in the process of intake, screening and case acceptance. (Were they treated courteously by program's reception staff, in person or on the phone? Were they accurately informed of the length of time required for key steps in the process— eligibility screening, substantive interview, disposition of their application and referral to assistance?)

• They can also assess important aspects of representation. (Did the advocate keep them adequately informed of the progress of the case? Did the advocate adequately inform them of options in the case and provide them an opportunity to determine the objective?)

• They can assess whether the client was satisfied with the outcome in the case (which is not necessarily a measure of quality or if the best outcome possible was, in fact, obtained).

• They can assess the degree to which pro se clients felt that they had obtained sufficient information to represent themselves and to be successful. (Were they adequately informed of the steps they need to take for self representation and how to proceed? Were they successful?)

• They can assess satisfaction with partner agencies or entities, particularly where such information might affect how the evaluating organization provides assistance and referrals. (Were they satisfied with the assistance provided by an agency or organization to which they were referred? Did the agency or organization addressed the problem for which they start assistance?)

Instructions for editing the survey.
The following survey asks many more questions than is likely to be necessary or appropriate. It asks questions in a broad range of areas, and should be reduced to a smaller number directly pertinent to areas about which you seek data.

DC Bar Foundation Template - Client Satisfaction

2. General satisfaction / overall service

1. Overall, how would you rate the assistance you received?

- [ ] Excellent
- [ ] Very good
- [ ] Good
- [ ] Fair
- [ ] Poor

2. If you have another legal problem, how likely are you to seek out assistance again?

- [ ] Very likely
- [ ] Likely
- [ ] Unlikely
- [ ] Very unlikely

3. Do you have suggestions about how to improve our service?

DC Bar Foundation Template - Client Satisfaction

3. Satisfaction with intake and screening

1. Please tell us if you were satisfied with the process for obtaining our assistance.

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Not sure
Overall, how satisfied are you with your experience applying for assistance?					
How did you feel about the courtesy and respect shown you by staff?					
Were satisfied that you were you able to explain your problem completely to someone that you felt was listening to you?					
How do you feel about how long you have to wait?					

2. How long did you have to wait for service? [For telephone intake, this could be changed to: "How long did you have wait to speak to someone about your problem?]

- 0 to 5 Mins.
- 5 to 10 mins.
- 10 to 15 mins.
- 15 to 30 mins.
- 30 to 60 mins.
- More than 60 mins.
- Not sure

3. Do you have suggestions about how to improve our intake process or do you have other comments?

DC Bar Foundation Template - Client Satisfaction

4. Satisfaction with advice and self-help assistance

1. Please indicate the degree to which you agree with the following statements:

	Strongly agree	Agree	Disagree	Strongly disagree	Not sure
The advice and information I was given helped me understand my situation better.					
I had a clear idea what to do next.					
The advice and information I was given helped me solve my problem or improve my situation.					
If I have a friend or family member with a similar problem, I would refer them to this program for assistance.					

2. Comments or suggestions

DC Bar Foundation Template - Client Satisfaction

5. Satisfaction with representation

1. Please indicate the how satisfied or dissatisfied you are with the following:

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Not sure
How long it took to get an appointment with the person who represented you					
How my advocate kept me informed of key developments in the case					
How my advocate explained my choices in the case and let me decide what to do.					
The degree of courtesy and respect shown me by my advocate					
The outcome of my case.					

2. Comments or suggestions

6. Satisfaction with referrals

Our records indicate that we referred you to ####. It will help us to know how well you were served by them.

1. Were you able to obtain assistance from ###?

- Yes
- No

NOTE TO SURVEY EDITORS: SURVEYMONKEY CAN BE EDITED TO TAKE RESPONDENTS WHO ANSWERED "NO" TO ONE SET OF QUESTIONS, AND THOSE WHO ANSWER "YES" TO ANOTHER AUTOMATICALLY.

2. If No, what was the reason?

- I decided not to pursue it
- I did not know how to contact them
- They did not call me back
- They said that they could not help me with my case
- Other (please explain)

3. If Yes, please indicate the degree to which you agree with the following statements:

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	Not sure
Were you satisfied with the help you received?					
Were you satisfied with how you were treated?					

4. Comments

DC Bar Foundation Template - Client Satisfaction

7. Thank you - You are done!

Thank you for your time and insights. They will be helpful to us in improving how we serve our clients.

DC BAR Foundation Template - Collaborative Relationships

1. Introductory Page

THE FOLLOWING PAGE IS WRITTEN TO PROVIDE GUIDANCE FOR SURVEY DESIGNERS AND ALL BUT THE LAST PARAGRAPH SHOULD BE DELETED FROM ANY SURVEY CREATED USING THIS TEMPLATE. THE TEXT ON THIS PAGE CAN BE REPLACED IN ORDER, AMONG OTHER THINGS, TO EXPLAIN HOW THE INFORMATION SOUGHT WILL BE USED, TO EXPLAIN ISSUES SUCH AS CONFIDENTIALITY AND TO THANK RESPONDENTS FOR THEIR TIME AND THOUGHTS.

Nearly every recipient of a public funding grant identified improving collaborative and cooperative relationships with other service providers as one objective of their project. In spite of the admittedly subjective nature of the objective, this tool offers a simple survey or interview to assess the degree to which new or improved collaborative relationships have in fact been established in the course of the project. It provides an opportunity to identify problems in a relationship with a collaborating organization that undermine the success of a project. The best way to find out how a relationship is working is to ask the people involved. The community partner survey or interview process ensures that project leaders pay attention to the needs of the partners. In addition, the tool may create an opportunity for interchange with the collaborating organization about how well the project is working and about opportunities for improving it.

The specific questions asked of collaborating organizations may vary considerably according to the nature of the project and the role that the other agency plays. The survey/interview template offers sample questions, but you should develop your more specific questions. The nature of the question may vary depending on what you wish to find out. You may wish, for example, to ask questions about specific efforts undertaken to collaborate. Or you want to find out the degree to which the agency is familiar with the project and understands it. Finally, you may wish to inquire about the collaborating agencies' view of the effectiveness of the project or its sponsoring program and suggestions for improving them.

Note that this tool is not designed to assess funded collaborative projects such as the Court Based Legal Services Project, although it could be adapted for such use. A separate tool has been developed as an example of how a self-assessment of such a project could be conducted. [See DC Bar Foundation Template - Funded collaborations.]

This tool is designed as an on-line survey, but can be used as a template for a telephone or in-person survey in as needed.

****
The following is text which should be retained in the survey
****

[Name of your organization] is involved in a project to [briefly describe the project and its overall objective.]. We have identified you as an organization as one with which we feel it is important to have a collaborative, cooperative relationship to help the project to succeed. It would be helpful to us if you would answer the following questions to help us assess the degree to which we have succeeded.

DC BAR Foundation Template - Collaborative Relationships

2. Familiarity with our work

1. Please indicate the degree to which you agree with the following statements:

	Strongly Agree	Agree	Somewhat agree	Disagree	Strongly Disagree	Not sure
I am familiar with [Name of your organization]'s Project to [general description of the project]						
I am aware of what the project seeks to accomplish						

Comments

2. What aspect of our work is the most beneficial to your organization?

DC BAR Foundation Template - Collaborative Relationships

3. Assessing our collaborative relationship

1. Please indicate the degree to which you agree with the following statements:

	Strongly Agree	Agree	Somewhat agree	Disagree	Strongly Disagree	Not sure
[Name or acronym of your organization] is generally effective at establishing cooperative/collaborative relationship with other organizations						
We have established an effective cooperative/collaborative relationship with you						

Comments

2. Suggestions about how we can cooperate or collaborate more effectively

DC BAR Foundation Template - Collaborative Relationships

4. Specific Collaborative Efforts

INSTRUCTIONS TO SURVEY DEVELOPERS: IF YOU HAVE ENGAGED IN SPECIFIC COLLABORATIVE EFFORTS WITH AN AGENCY BEING SURVEYED, YOU MAY WISH TO ASK ABOUT THE PROJECT SPECIFICALLY. THE FOLLOWING IS GIVEN AS AN EXAMPLE, DRAWN FROM ONE OF THE PUBLIC FUND GRANTS.

1. You have participated with us in meetings related to the Attorney-of-the-Day Project. Please, indicate the degree to which you agree with the following statements:

	Strongly Agree	Agree	Somewhat agree	Disagree	Strongly Disagree	Not sure
We have collaborated effectively to identify trends and collectively approach the courts to suggest appropriate changes						
We have collaborated effectively in addressing changes in the "temporary appearance" forms and procedures						
We have collaborated effectively to ensure that referrals to social service agencies are successful in meeting clients' needs						

Comment

DC BAR Foundation Template - Collaborative Relationships

5. Effectiveness of our work

It would be helpful to us if you would give us some feedback on the effectiveness of our work

1. Overall, how effective are we as an organization [in addressing the legal needs of low-income persons]?
[You should change the final clause to fit the focus of your organization to be more specific if you target a particular population or legal issue. For example, "Overall, how effective are we as an organization in addressing the legal needs of low-income persons who have tested positive for HIV/AIDS?]

- Very effective
- Somewhat effective
- Very ineffective
- Effective
- Ineffective
- Not sure

Comment

2. How effective are we in accomplishing the objective of the ### Project [add language appropriate to your project].
[The more precise and descriptive you can be, the more useful the response may be. For example,
"How effective are we in making certain that the process for resolving disputes between landlords and tenants in DC housing court is fair?
Or,"How effective have we been in bringing about reform of discharge planning at the city jail?"]

- Very effective
- Somewhat effective
- Very ineffective
- Effective
- Ineffective
- Not sure

Comment

3. From your perspective, what is the most effective aspect of our organization?

4. What is its least effective aspect?

DC BAR Foundation Template - Collaborative Relationships

6. Thank you - You are done!

Thank you for your time and insights. They will help us in improving how we function and serve our clients.

DC Bar Foundation Template - Funded collaborations

1. Explanation of the survey instrument

This is a sample survey that might be used to assess the effectiveness of the collaboration funded by the DC Bar Foundation through the Court Based Legal Services project. The recipients of the survey would include staff who participate in the project, court personnel familiar with the project and personnel of other organizations, including legal aid programs which do landlord-tenant work, as well as any other individual who might be familiar with the project.

DC Bar Foundation Template - Funded collaborations

2. Introduction

The Court Base Legal services Project is a collaborative project involving the Legal Aid Society, Bread for the City and the Neighborhood Legal Services Program, which together have established an office in the DC Superior Court to focus on landlord-tenant and other housing matters. We would appreciate your answering a few short questions regarding the project.

1. Please indicate how successful you believe we have been in accomplishing the stated objectives of the project.

	Very successful	Successful	Somewhat successful	Unsuccessful	Very unsuccessful	Don't know
To increase representation of persons living in poverty who face eviction						
To reduce barriers to access to legal services by locating in the courthouse						
To identify and respond to emerging trends in the application of landlord-tenant law						
To identify and respond to policies and practices which adversely affect large numbers of low income tenants						

Comments

DC Bar Foundation Template - Funded collaborations

3. Effectiveness of the collaboration

1. Please indicate the degree to which you agree with the following statements regarding the collaboration among the Legal Aid Society, Bread for the City and the Neighborhood Legal Services Program

	Strongly agree	Agree	Somewhat agree	Disagree	Strongly disagree	Don't know
The collaboration among these programs has been instrumental in supporting the success of the project						
The three programs function effectively together to assure the smooth operation of the project						
The three programs work effectively together to respond to changing circumstances which affect the project						
Each of the programs effectively meet its responsibilities and commitments to make the collaboration effective						

Comments

4. Effectiveness of collaboration (continued)

1. What are the most effective aspects of the collaboration among the three programs?

2. What is most in need of improvement to make the collaboration more effective?

DC Bar Foundation Template - Funded collaborations

5. Familiarity with the project

1. Which statement most closely describes your familiarity with the Court Based Legal Services Project?

- I am a staff member
- I interact directly with it on a regular basis
- I don't work with the directly but am familiar with its operation
- I only know it by reputation
- I know very little about it

Other (please specify)

DC Bar Foundation Template - Funded collaborations

6. Thanks - The survey is complete

Thank you for your time and insights. They will help us improve the operation of this valuable program.

Assessing Long and Short-Term Outcomes

Short and Long-term Outcome Objectives[1]	Possible techniques to measure achievement of outcomes	Grantee
Preserve affordable and livable housing for seniors	• Long-term — Follow-up after six months with random selection of persons who have been served served with telephone interview to determine if they have housing and are having situation is stable	LCE
Use of advanced directives to prevent fraud and scams which can lead to loss of home	• Long-term — Follow-up with a random selection of persons served persons served with a telephone interview to do fraud/scan check up	
Systemic — Create a system where tenants' interests are as well represented as landlords'	• Long-term — Conduct a review of court cases for period before project to create baseline and period after project has operated to determine its outcomes have improved for tenants	LSIC
Stabilize tenants' housing situation	• Long-term — Follow-up with random selection of persons served with telephone interview to determine if they are still in their housing and continued tenancy is secure	
"…to maintain the client's rental unit, to provide time to vacate, to gain rental abatements, and/or to effectuate repairs"	• *Short-term — Each of these potential outcomes could be easily recorded at a closing*.	BFC Court Based Legal Services
Improve the health of children (CLC has engaged a professional evaluatorand is willing to share its learnings and experience.)	• Long-term — Survey of physicians and other health workers regarding perceived impact on health of families who have been served • Long-term — Follow-up interviews/surveys with random selection of families served to assess impact on family health issues including recurrence of health problems or development of new conditions	CLC

[1] These Outcomes and possible techniques to measure their accomplishment have been extrapolated from the Quarterly Reports submitted to the DC Bar Foundation by its Public Funds Grantees. The chart is designed only to serve as the basis for discussion of where assessment of the accomplishment of long-term outcomes might be considered. There is no intent to suggest that any or all of the techniques suggested are necessary or appropriate. The chart is designed to provoke analysis of areas where a grantee might find value in assessing the actual impact of its work, and the accomplishment of its explicit or implicit objectives.

Systemic -- Reform discharge planning at the jail		• Long-term — Identify specific indicia of improved discharge planning — What features would be different if it were reformed? • Long-term — Monitor records, if they are accessible. • Long-term — Follow-up interviews of jail personnel regarding discharge planning procedures, if possible	University Legal Services
Systemic -- ensure appropriate accommodation for individuals with psychiatric disabilities during community supervision or parole/probation revocation processes		• *Short term — Record outcomes advocate closing regarding appropriate accommodations for persons represented* • Long-term — Follow-up surveys/interviews of agencies which provide services to release detainees with psychiatric disabilities regarding their experience with placements	
Decrease periods of incarceration		• Long-term — Monitoring of public record regarding periods of incarceration for persons with psychiatric disabilities, if possible	
Reduce treatment displacement of individuals with psychiatric disabilities and increase access to appropriate treatment models		• (I do not know enough about "treatment displacement" nor what constitute "appropriate treatment models" to suggest a means for determining the success of its intended outcome. It is, however, a nicely stated objective.)	
To help people keep their jobs and/or health insurance		• Long-term — Follow up with random selection of persons served with telephone interview to determine if they are still employed, and if not the factors which contributed to their loss of employment. • Long-term — Follow up with a random selection of persons served with a telephone interview to determine if they have been able to maintain their health insurance, and if not, the factors which led to a loss.	Whitman-Walker Clinic
To access benefit programs that provide health care, income, food and housing		• Long-term — Follow up with random selection of persons served with telephone interview or survey to conduct a check-up regarding their continued access to healthcare, benefits or employment, food stamps and shelter	
To protect clients' medical privacy		• *Short-term — Outcome recorded at a closing*	
To make arrangements for the future		• *Short-term — Outcome recorded at a closing*	
To resolve pressing debt issues		• *Short-term — Outcome recorded at a closing* • Long-term — Follow up with random selection of persons served with telephone interview regarding their current situation with regard to debt	

To preserve affordable housing		• *Short-term (individual) — Record outcome at a closing* • Long-term (advocacy to preserve the continued existence of rental units for low-income persons)	LASDC
To prevent avoidable evictions		• *Short-term (individual) — Record outcome at a closing*	
To preserve access to public or assisted housing		• *Short-term — Record outcome at case closing* • Long-term — Ongoing monitoring of policies of the DC Public Housing Department regarding applications, waiting lists, etc.	
To assist in creating family stabilization through custody and child support orders		• Long-term — Follow up with random selection of persons served with telephone interview regarding the stability of the family (has child support, in fact, been paid? … has a custody order been followed and created stability?)	
To facilitate access to adequate health care safety net programs		• Long-term — Follow up with random selection of persons served with telephone interview regarding their continued access to healthcare, including whether they have needed healthcare and were able to access it	
To ensure that cash benefits are available to eligible person		• *Short-term — Record outcome at case closing* • Long-term — Follow-up with random selection of persons served to determine their continued access to and use of available benefits	
Systemic— improve the operation of landlord-tenant court		• Long-term — Conduct a review of court cases for period before project to create baseline and period after project has operated to determine its outcomes have improved for tenants	LASDC Court-based Legal Services
Systemic— strengthen enforcement of the housing code		• *Short-term — Record outcome at case closing* • Long-term — Monitor records of Department of Consumer and Regulatory Affairs regarding housing follow-up	
Systemic—make certain that the process for resolving disputes between landlords and tenants is fair (change in Courthouse culture)		• Long-term — Conduct a review of court cases for period before project to create baseline and period after project has operated to determine its outcomes have improved for tenants	

SYSTEMIC ADVOCACY — SELF ASSESSMENT

Impact activity → Evaluation tool ↓	Legislative and administrative advocacy	Complex litigation and other advocacy with broad impact objective	Economic development	Group and organizational representation
Client satisfaction surveys	If there are identifiable clients being represented in administrative or legislative advocacy strategies, a survey to determine the degree of their satisfaction with the conduct of the representation would be useful.	In complex advocacy with multiple clients and multiple interested parties, a survey to determine if clients felt that they were adequately informed and consulted and were satisfied with the outcome.	A client satisfaction survey would be appropriate to determine if clients represented in economic development are satisfied with the conduct of the representation and with its results. The survey could also be used to determine the value of the community profile provided to the community leaders.	A client satisfaction survey would be appropriate to determine if group clients and organizations are satisfied with the conduct of their representation and with its results. Subject to the sensitivities of the group and understandings regarding who is the client and who is authorized to speak for the group, satisfaction surveys of group members might yield insightful data.
Follow-up surveys	If there are identifiable clients being represented in administrative or legislative advocacy strategies, a follow-up survey 3, 6 and/or 12 months after the representation ended could be instructive. Note that the intermediate objectives for such representation could be something other than to gain passage of the administrative rule or legislation in question. A short or intermediate objective, for instance, could be to develop a workable alliance with another group or individual, or to educate a key legislator or legislative committee regarding an issue.	Follow-up surveys conducted at 3, 6 and/or 12 months can be a very useful tool to determine the intermediate and long-term effect of a broad litigative or other advocacy strategy if individual clients can be identified and contacted. They can be particularly useful to identify whether the effort resulted in positive change in the clients' lives.	If a large group of potential beneficiaries of an economic development project can be identified (members of a large group, persons living in a discrete area, such a neighborhood or small town), a survey to determine the effect of an economic development project after it has taken hold can be of significance to the managers of the project regarding future strategy. Follow up surveys can be used at various stages of the projects, to evaluate education, planning, implementation and ultimately the impact of the project on the community.	Depending on the nature and intent of group and organizational representation, periodic surveys regarding the perceived effectiveness of the representation might be appropriate.

SYSTEMIC ADVOCACY — SELF ASSESSMENT				
Impact activity → Evaluation tool ↓	Legislative and administrative advocacy	Complex litigation and other advocacy with broad impact objective	Economic development	Group and organizational representation
Follow-up interviews	If there are identifiable clients being represented in administrative or legislative advocacy strategies, a survey to determine the degree of their satisfaction with the conduct of the representation would be useful.	Follow-up interviews conducted at 3, 6 and/or 12 months can also be useful to explore the intermediate and long-term effect of a broad litigative or other advocacy strategy if individual clients can be identified and contacted. An interview can be particularly useful to learn about unanticipated changes in the clients' lives and to obtain data about the cause if the desired results were not achieved.	Interviews of persons involved in an economic development project can yield valuable data regarding what is perceived to have worked and what has not. Because an interview format allows for the exploration of issues, follow-up interviews may uncover unexpected results that might shape the future direction of the project or might be highlighted in a marketing report.	Based on the nature and intent of group and organizational representation, periodic interviews of group members regarding the perceived effectiveness of the representation might yield helpful data to guide further interactions with the group. Such interviews should be conducted with a high degree of sensitivity to the leadership dynamic within the group and should not be undertaken if they would be seen as questioning the leadership of the organization.
Focus Groups	Focus groups are a very effective tool to examine the effectiveness of a legislative or administrative strategy that affects a large number of people, who may be difficult or impossible to identify as individuals.	Focus groups are a potentially valuable tool to evaluate the effect of complex litigation and if there are a number of potential clients who are not easily identifiable (such as in a class action) for obtaining data regarding the perceived results of the advocacy and if appropriate for informing its future course.	Focus groups are a very suitable tool for helping to evaluate the effectiveness of an economic development project and for guiding its future course. A focus group can help provide insight into what has been successful and what has not. Most importantly, focus groups can help answer the question *why* a strategy has been successful or not. They can be extremely useful in helping chart the future direction of a project (a use to which focus groups are traditionally put in the profit-making sector.)	Focus groups may be less useful in the representation of groups, unless the group itself is treated as a focus group itself from time to time. If the group or organization is especially large, its membership may be represented by a selected group of its members, acting as a focus group.

SYSTEMIC ADVOCACY — SELF ASSESSMENT				
Impact activity → Evaluation tool ↓	Legislative and administrative advocacy	Complex litigation and other advocacy with broad impact objective	Economic development	Group and organizational representation
Outcome measures	Outcome measures that show the results of a successful legislative or administrative strategy can be very powerful. The difficulty is often that the connection between the legislative or administrative change and broad outcomes is sometimes attenuated and immediate causality cannot always be shown. Nevertheless, there are times when direct causality can be shown (legislation offering specific relief to a an identifiable group of people). It is important to note, as well, that accomplishment of short and intermediate objectives may be reflected in significant outcomes that are important to capture. It is also important to record for management purposes when desired outcomes are not achieved. Decisions about how and where to spend scarce resources should reflect a realistic assessment of whether intended objectives are being met .	Outcome measures reflecting the results of successful litigation that affects large numbers of persons or that changes the law that will affect others can be a very potent tool. The difficulty is often that the connection between the litigative result and broad outcomes is unclear and it may be some time before long-term outcomes are achieved.	Clarity about the objectives of an economic development project can support a rich gathering of outcome measures (e.g., numbers of day care slots created, numbers of jobs created directly, numbers of housing units created). Outcomes also occur throughout the process of a CED project. One aspect that can be measured is success in engaging the community by counting the number of persons who participate in each step of the development process and the number of leaders who emerge from each. Milestones that can be identified for evaluation include the community profile, project identification, project planning and project implementation.	How outcome measures might be appropriate in group and organizational representation is a function of the objectives that the representation seeks.