



TIG FINAL EVALUATION REPORT¹

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I. Project Goals and Objectives

The project goal set forth in the approved evaluation plan is to “*Enhance the effectiveness and efficiency of assistance provided low income individuals and populations in New Mexico by creating and implementing an integrated statewide online triage program for New Mexico Legal Aid and five other legal services providers in the state.*”

Four Project Objectives to accomplish this Goal were identified:

Project Objective A: Develop and implement a web-based statewide system that obtains information from users via interactive Neota Logic interviews and transfers the interview data to the data systems of NMLA and five other legal services providers.

Project Objective B: Improve low income persons’ access to services and legal services providers’ efficiency and effectiveness by developing and implementing a triage tool for advocates to analyze data obtained through the Neota Logic interviews and determine the most appropriate services that should be provided based on factors such as interviewees’ income, language, legal issues, and geographic locations as well as programs’ priorities and patterns at case outcomes.

Project Objective C: Improve legal services providers’ efficiency and effectiveness by adapting the advocate triage tool described above to create a bilingual (English/Spanish) version of the triage tool for individuals with legal needs to obtain information about their issue, identify the most relevant services and resources to best address the needs, and facilitate intake process when appropriate.

Project Objective D: Increase low income persons’ access to legal information and resources by developing and publishing on the statewide website new self-help and legal education materials.

¹ This evaluation report was prepared by John A. Tull of John A. Tull & Associates pursuant to a contract between New Mexico Legal Aid and the Consultant.

II. Evaluation Data and Methodologies

At the outset of this evaluation, the evaluator met by phone and videoconference with the managers and staff responsible for implementation of the Project to get agreement on what specific outcomes were intended that would signal accomplishment of the stated objectives “to improve providers’ efficiency and effectiveness” and “improve low income persons’ access to services.” Agreement was also reached regarding which data, consistent with the LSC Approved Evaluation Plan, would be obtained and reviewed to assess the Project’s accomplishment of its objectives.

As a result of those discussions, it was agreed that the evaluator would participate in the monthly videoconference meetings (via *GoToMeeting*) of the Project’s partners: the leadership of Legal Aid of New Mexico (NMLA), responsible staff at Law Access of New Mexico (LANM or Law Access), the developers from Neota Logic and responsible staff that Pro Bono Net. In addition, the evaluator was given access to the online project management of the Project reflected on BaseCamp. He also reviewed the Project’s Milestone Reports and attachments.

The evaluator developed a user survey on Survey Monkey that is highlighted on the opening page of the triage interview, pops up if a user exits the interview before its completion and at the end of the interview for those who complete the interview. At the date of this evaluation report, only 44 users have responded. Their feedback was almost uniformly positive as is described later in this report.²

The evaluator also examined system data showing the number of applicants, the disposition of their application, the days and hours when they applied and their geographic distribution throughout the state.

The evaluator, in coordination with evaluation of the triage project being conducted by the RAND Corporation,³ interviewed a cross-section of staff and management of New Mexico Legal Aid and Law Access of New Mexico regarding their experience with the triage program and their perceptions regarding its impact on improving access and on the efficiency and effectiveness of each organization. Care was taken to interview persons by Skype or in person in the outlying rural offices of New Mexico Legal Aid and to include supervisors, intake staff, staff attorneys and paralegals. Approximately 25 individuals were interviewed.

III. Summary of Major Accomplishments, Recommendations and Future Steps

The TIG supported triage project successfully developed the core of a robust online system for low-income persons in need of legal assistance to seek help and to be matched with the

² See the discussion at p. 7.

³ The RAND Corporation, a widely recognized, national, nonprofit research organization sought and was given permission to assess the Project, because of the interest of one of its divisions in systems that affect access to social justice. The evaluator responsible for this report coordinated with three evaluators from RAND who participated in the interviews of staff and managers and the shared notes and observations based on those evaluations.

most appropriate service to meet their needs. The system is designed to send applicants for service to the organization best situated to help them and to serve as a bridge to that organization by transferring key information about the applicants' potential eligibility and basic facts of their situation. The system is designed so it can also link applicants to other forms of assistance and support and provide them with information about potential self-help actions to address their problem, if appropriate.

Even without planned outreach, the system has opened access to persons who are often unable to seek help during normal business hours because of work and other obligations. It also has demonstrated the potential for expanding access to needed assistance to populations in rural areas throughout the state, although its success in this area will depend upon the larger problem of increasing web access in remote areas.

The system operates on a highly sophisticated platform, so that while it was deliberately designed to present a simple, uncluttered interface to the user, it is capable of expansion to more complex interactions as experience with the system grows and new needs are encountered. At the same time, in spite of the sophisticated technical core of the system, management of it has gravitated toward an increasing capacity for non-technical persons to make changes to its content and the logic flow of its interviews and to adjust the information provided to users and how their matter is referred. This latter capacity will accelerate the capacity of the system to accomplish still unfinished objectives, such creating responsive and appropriate Spanish-language capacity and bringing in other legal aid partners.

The system has national implications, as many state justice systems are considering how to create similar triage capacities. The core technical solidity of this system coupled with its capacity to be adjusted without sophisticated technology training and expertise will support its replication – with designs that are tailored to local circumstances – in other states and regions.

IV. In-Depth Analysis of Accomplishments

Project Objective A: Development and implementation of a web-based, statewide triage system.

The following analysis is structured in accordance with the four Project Objectives of this TIG Grant. The first Objective set forth above principally involved steps on the part of the Project partners to develop and implement the web-based, statewide triage system. This objective principally involved design and implementation – a cyber equivalent of a bricks and mortar objective.

What has been created is a large first step toward forming the core of a coordinated statewide approach to identifying and responding to the legal needs of low income persons throughout the state. The Project has developed the system with a diligent commitment to quality and effectiveness. The system is called upon to operate in complex context culturally and geographically. New Mexico was observed to be more like five different states, with very different geographic cultural and ethnic regions. The system also has to have the

versatility eventually to connect with five different legal aid organizations for purposes of referral and responsiveness to clients seeking assistance.

As detailed below, the online triage system in New Mexico has a long way to go to accomplish all of its intended objectives. It so far, involves only two of the legal aid providers in the state, albeit by far the two largest, which together provide services to most of the persons receiving legal assistance in the state. It is still only available in English, although there are plans to have a Spanish-speaking version now that most of its kinks have been worked out of the system.

A review of the timeline on BaseCamp of activities undertaken since the TIG Award was granted reveals a robust engagement in review, interchange and response throughout the project, reflecting the high degree of diligence that the partners brought to the development and implementation of the web-based system. First, they devoted a great deal of analysis in the development of the final system specifications that were agreed to in June 2014. In developing the “System Requirements,” the Project’s partners examined the documentation for triage systems in place in Illinois, Massachusetts, Ohio, Iowa and New York City. They also worked with a series of “potential user scenarios” to identify the circumstances in which a potential client, an advocate or others might use the system and in broad terms what information the triage tool might extract and what content it might deliver to the user. The scenarios highlighted the built-in tension between, on the one hand, seeking to obtain large amounts of information and offering different alternatives and, on the other, keeping the tool simple, direct and easy to use. As the triage tool evolved, it erred on the side of simplicity and fundamentals with the capacity to expand functionality as comfort with the system grows.

The System Requirements, set forth in a 28-page detailed document, helped create a comprehensive vision of what each component of the overall system is intended to accomplish in support of the Project’s goals and objectives. This clarity of vision helped shape the specific details of the system as it developed over time and, presumably, will continue to do so as the Project evolves further.

The Project Goal is consistent with the Goals and Objectives set forth in the Project’s evaluation plan, but provides a perhaps clearer picture of its intended impact for applicants for service and the efficiency and effectiveness of the service delivery system. That goal underlies the analysis of accomplishments – and challenges – set forth in this Evaluation Report and is described in the following language:

“... To increase the quality and quantity of services in New Mexico by developing a robust statewide triage system to match people with the most meaningful and least costly service likely to meet their needs.

“It is anticipated that the triage system will increase the effectiveness and efficiency of the current service delivery model by more intelligently directing litigants to the program or resource best-suited to help and lead to actionable results - towards the ultimate goal of providing some

form of effective assistance to 100% of low income individuals with civil legal needs.”

Once the system specifications were analyzed and codified, the Project began work to develop the online interviews, creating scripts for the initial screens with detailed logic flow diagrams. The project focused first on interviews related to basic applicant information, identification of emergencies and financial screening. Throughout late fall 2014 into spring 2015, the Project developed interviews in family, consumer, housing and public benefits, four areas known to have the highest volume and deemed to lend themselves best to online interview.

In May 2015, the welcome and closing screens were developed in preparation for a soft launch of the system. Two sessions were held in June 2015 during which staff of NMLA and two clients tested the system and suggested revisions. In addition, several advocates from Law Access conducted individual testing and offered feedback. Pro Bono Net, a Project partner, engaged a business analyst and technical writer to review the interviews for consistency and readability.

As a result of the feedback, which was generally positive, several changes were made to the triage tool. Most significantly, the emergency screening section was removed entirely, because of the length it added to the interview. In its stead, language was added to the introductory screen directing the user to call 911, if faced with immediate danger – a strong consideration in domestic violence cases. The questions related to domestic violence were moved from the emergency screening to family law. In addition, some questions and screens were edited to increase readability and clarity. The welcome, conclusion and reporting screens were rewritten.

The Project also completed a very detailed “**New Mexico Triage Users Guide – Advocates and administrators**, which provides a thorough, step-by-step description of the process and what to do within it.

Agency portal. One interface of the triage system is with its low-income users. The other is with the partner organizations to which referrals are made based on the information provided by the person interviewed. The design of the system is to offer users help or information relevant to their situation at appropriate times during the interview. At the end, they receive a report with one of several – what the documentation calls – outcomes. The most common outcome in the fledgling months of the triage tool for users who are putatively financially eligible and have a civil legal problem is to be referred to one of the two partner organizations. As the project matures, the goal is, when appropriate, to provide users with self-help materials pertinent to their situation, as well as to refer them to a partner organization.

The Triage System is expected when fully implemented to include six legal aid providers: New Mexico Legal Aid, Law Access New Mexico, Pegasus Children’s Legal Services, Lawyer Referral for the Elderly Program, Senior Citizens Law Office and the Southwest Women’s Law Center. The first stage of implementation has involved the two largest providers New Mexico Legal Aid (the TIG Grantee) and Law Access to Mexico, which handle

by far the largest number of legal aid cases in the state. NMLA and LANM worked closely together in the design, implementation and adjustments to the system to assure that it fits appropriately in the workflow of each organization. The Project has involved the four potential partners in planning and strategy discussions and has kept them informed of progress, but has not yet implemented their direct involvement in the system.

The process for handling cases that are referred from the triage portal is similar in both NMLA and LANM. Designated staff in each firm review the basic applicant information and perform a conflict check, based on the applicant's name and the name of any adverse parties. If there is no conflict, the case is passed on to intake in each organization. The applicant is called to verify the financial information and to confirm details in their case. Financial information obtained in the online interview is not as detailed in the interview as it can be in a phone interview and the tool is purposefully designed to let in more people than will ultimately qualify financially.

Generally, both organizations get back to people within two days of their online interview, although they often encounter difficulty reaching them. In some cases, the triage tool users have not provided contact information or it is inaccurate. In others, users do not respond to calls and follow-up emails. As discussed later, a high percentage of triage users access it outside of normal working hours for the legal aid organizations. If those individuals are low-wage workers, they may be unable to receive or return a call during business hours.

Transfer to Pika, the case management system. The smooth processing of cases substantively depends on having the information obtained in the online interview available in the Pika Case Management System. Unfortunately, until very recently the system was unable to transfer the data automatically and the applicants' interviews had to be transferred manually by cutting and pasting the information. As a result, both NMLA and LANM were devoting significant amounts of staff time to the laborious process of cutting and pasting information into Pika. Apparently, this manual intervention will no longer be necessary, freeing up significant staff time and speeding up the processing of cases.

Project Objective B: Improved access to services for low-income persons and improved efficiency and effectiveness for legal services providers in determining the most appropriate services to be provided.

The accomplishments under this objective pertain principally to the triage system's impact on the access of low-income persons to timely and appropriate legal assistance and on the efficiency and effectiveness of the participating legal aid providers in responding to those needs.

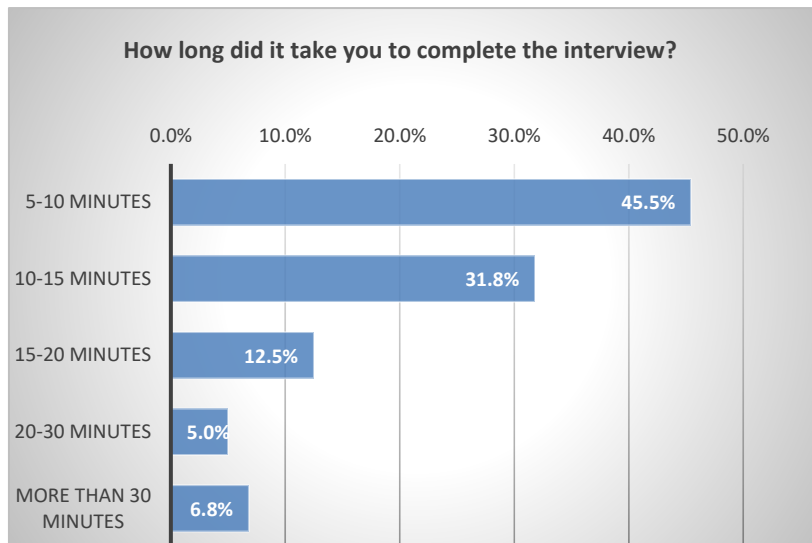
Impact on access. Several criteria are pertinent to the impact on access for low income persons. The first is the experience of users. Did they find the system easy to use and responsive? Did they feel that it allowed them to describe their situation adequately? Did it inform them sufficiently about what they should do next and what was going to happen in terms of potential referrals? Would they use it again or recommend it to family or friends?

Second, did availability of the triage system increase access to persons who otherwise might *not* have sought assistance? Were different types of clients able to seek assistance than were able to with the current intake system? Did the system increase access from all parts of the state?

Ease-of-use and usability of the system. As part of this evaluation, the evaluator went through the triage interview in order to form a subjective judgment regarding its ease-of-use and usability. The quality of the triage interview reflects the time and effort devoted to the design and implementation of the system, described above. In its Milestone Report 4, the Project identified the challenge of finding an appropriate balance between the need to ask sufficiently detailed questions about the user’s situation and the risk of adding too much complexity, potentially resulting in confusion and frustration. This evaluator’s impression from having taken the triage interview is that an effective balance has been struck. The appearance on each screen is lean and crisp. Clicking on a response that calls for further inquiry results in the immediate appearance on the screen of those further questions without any delay to download a new page or move from what is already been answered. Explanatory links are sprinkled throughout regarding the meaning of various terms or explaining why the information is needed. The links are highlighted prominently and open a small box with a short, clearly written statement when they are clicked.

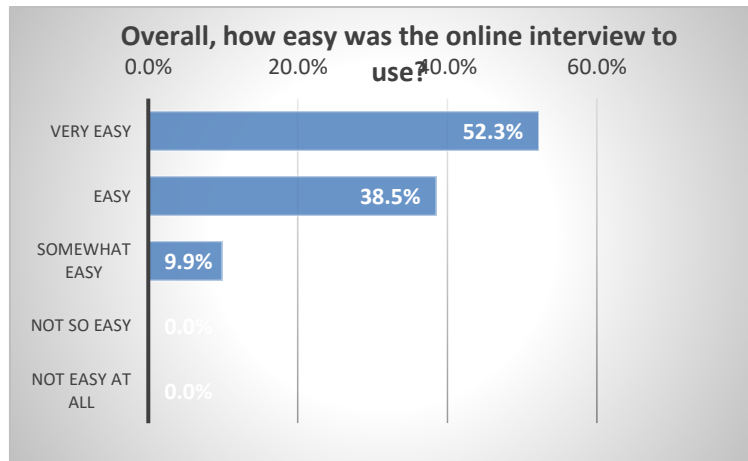
While the questions in each of the substantive areas are not sufficiently detailed to cover many of the things an advocate will need in representation, there is sufficient detail to flag important issues that the advocate should know. The interview is not designed to determine what course of action the applicant should take, but rather to make certain that the individual gets as quickly as possible to an advocate who will inquire further in order to be able to provide appropriate representation, if the user is eligible.

The crispness of the interface results in relatively quick interviews. Nearly half (45.5%) of the persons who responded to the online survey about their experience said it took them

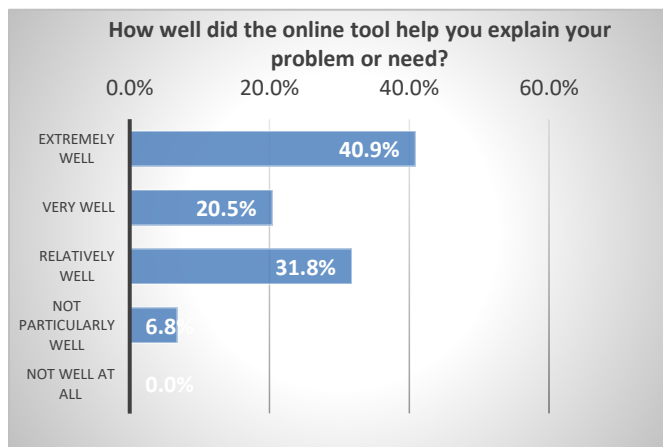


5 to 10 minutes to complete the interview. Another 31.8% completed it in 10 to 15 minutes. Only 6.8% of the users took more than 30 minutes to complete the interview.

Respondents to the survey were also very positive in their assessment of its ease-of-use and usefulness. In response to the direct question – “Overall, how easy was the online interview to use?” – more than half of the respondents found it “Very easy,” and 38.5% found it “Easy.” Nearly one in 10 found it “Somewhat easy,” but none found it “Not so easy” or “Not easy at all.”



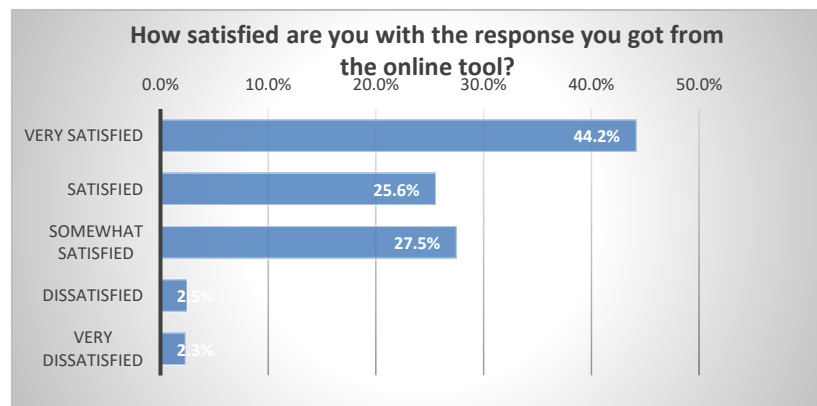
Ease-of-use is arguably not as important as the degree to which users of the online tool feel that it provides them a sufficient opportunity to describe their need. In this regard, a high



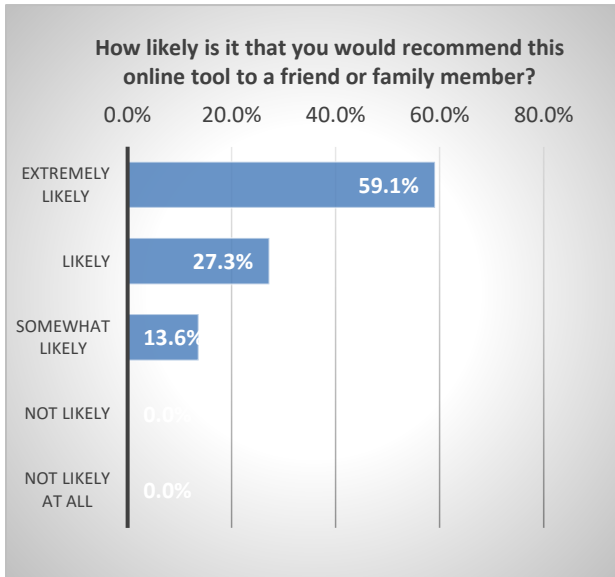
percentage of the respondents felt that the online tool did well at helping them explain their problem or need. Slightly more than 40% responded that it helped them explain the problem or need “Extremely well.” Another 20.5% replied that it did it “Very well,” with nearly a third replying that it did only “Relatively well.” 6.8% responded that they felt that it did not help them particularly well. One comment to the survey specifically addressed the balance

between seeking too much detail and having an easy tool to use. “I would [like] to see a place to explain the situation in more detail, but overall [a] wonderful and amazing tool. Thank you so much for providing this!!!!” Another said in part: “...y'all made it easy to understand.”

The survey also asked respondents: “How satisfied are you with the response you got from the online tool?” Again, the triage system got high marks from users with nearly 45% indicating they were “Very satisfied” and slightly more than

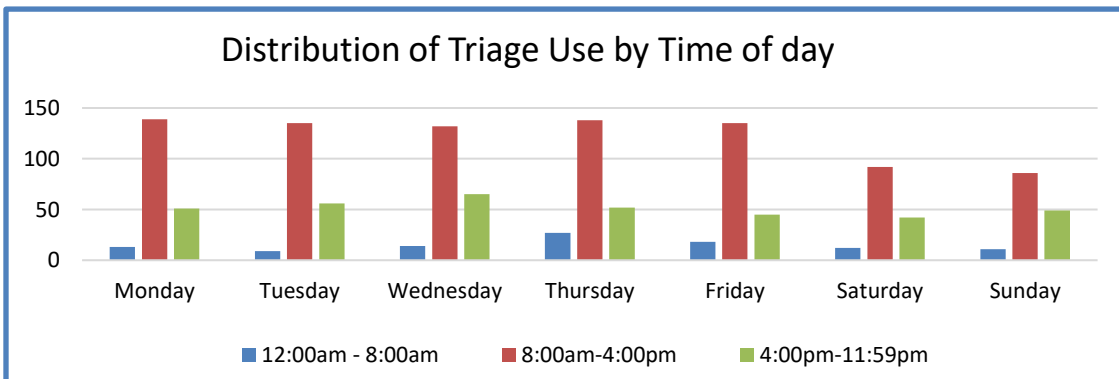


a quarter responding they were “*Satisfied.*” More than a quarter were only “*Somewhat satisfied*” and 2.3% were either “*Dissatisfied*” or “*Very dissatisfied.*” Two comments to the survey reflect the range of satisfaction. One user said simply: “*I was wondering why I’m not being helped.*” Another in contrast said “*This is a very easy tool to use and I was very happy with the outcome.*”



The final question asked of respondents to the survey was: “*How likely is it that you would recommend this online tool to a friend or family member?*” Nearly 60% replied they would be “*Extremely likely,*” and more than a quarter said they would be “*Likely*” with nearly 14% saying they would be “*Somewhat Likely.*” Another comment reflected satisfaction with the overall process: “*[I] was very satisfied with the response time and the professionalism I received beginning from [the] intake worker to David, the attorney that I spoke to. Thank you!*” Another said: “*I feel a great deal of relief knowing that I have a place to ask for an opinion of my case.*”

Increased access to legal aid services – date and time of access. The second area of inquiry regarding the Project Objective of increasing access to the legal aid delivery system is whether there are indicia that persons who might otherwise not have access the system appear to be doing so through the triage portal. A number of staff members interviewed during the site visit to the project stated their belief that one of the advantages of the system was its availability to persons after hours and on weekends. Among others, this would signal its ability to accommodate low-wage workers who often are unable to take time off work to seek legal help for problem.

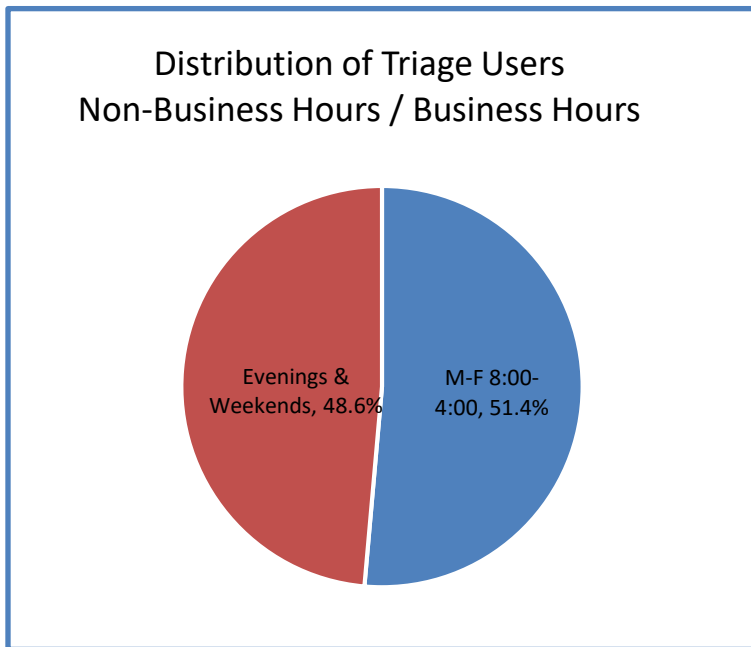


A review of the days and times when triage users access the system verifies what the staff members had reported anecdotally. The accompanying chart shows the times of day and

weekend days when triage users accessed the system from the date of its inception on April 24, 2016 until October 24, 2016. During that time, 1321 people accessed the triage system. As the chart shows, more than a quarter (26.14%) of those who used the system on weekdays did so between 4 PM and midnight and 7.7% did so between 12 midnight and 8 AM. An additional 292 individuals (22.1% of total users) accessed the system on weekends.

When the total number of individuals who accessed the system on weekends and on weekdays during times that the legal aid organizations were closed are totaled, it turns out that almost one half of the system's users since its inception did so outside of normal legal aid working hours.

The significance of this finding cannot be gainsaid. A challenge for legal aid delivery nationally has long been its accessibility to low-wage workers, who often are prevented from seeking assistance because of restrictions on their time imposed by employers. As the system evolves further, it will be important to assess the degree to which low-wage workers also bring different legal needs



than the programs are accustomed to. It is likely that at least wage claims and violations of the Fair Labor Standards Act are apt to number among the issues encountered by this population. It also has implications for when callbacks are made to triage applicants, since just as many low-wage workers are unable to initiate calls during working hours, so to they are restricted from receiving calls.

Another inquiry was conducted regarding whether persons are using the triage system who might otherwise not have accessed legal aid services. As this chart shows, between its

	Apr 21-Oct 24, 2016	Apr 21-Oct 24, 2016
Total Triage Applicants		1321
New Contact Triage Applicants		984
% New Contact Triage Applicants		74.50%
Total PIKA Intakes (not including Triage)	5928	4037
Contact PIKA Intakes (not including Triage)	3727	2498
Contact PIKA Intakes (not including Triage)	62.90%	61.90%

opening in April and October 24, 2016, Law Access had 1321 persons who sought help through the system. For 984 (74.5%) of those, it was their first time seeking assistance from LANM in any form. In contrast, for the same time period, 61.9% of persons who sought help through all other forms of intake except the triage system, were brand-new applicants. The percentage of applicants who were first-time users was similar for the previous April to October period in 2015 (3727 of 5298, or 62.9%). While not definitive, the data suggest that the triage system is attracting a higher percentage of new users of the legal aid system overall than are other forms of intake.

Increased access to legal aid services – geographic access. Another expected indicator of increased access engendered by the triage system is a more even distribution of intake across the state geographically – with an increased number of persons from rural areas. It is too early to determine if this hoped-for result will manifest. The system has not been advertised at all, and its availability is generally not known in rural areas. Moreover, advocates working in those areas observed that there is limited web and cell coverage in the Southeast, Southwest and Northwest quadrants of the state as well as on Native lands, and that few people in these areas have computers. Until a strategy is developed and implemented to address the challenge, staff members in some regional offices surmised that persons in these areas are not likely to take advantage of the system.

Several factors suggest that, when the system is fully running and advertised throughout the state, persons from remoter areas will use it, notwithstanding the concerns raised by staff in some outlying offices about lack of access to the web. First, the accompanying

Total Cases by County 4/24-10/24/16	Bernalillo	Catron	Chaves	Cibola	Colfax	Curry	De Baca	Dona Ana	Eddy	Grant	Guadalupe	Harding	Hidalgo	Lea	Lincoln	Los Alamos	Luna	McKinley	Mora	Otero	Quay	Rio Arriba	Roosevelt	Sandoval	San Juan	San Miguel	Santa Fe	Sierra	Socorro	Toas	Torrance	Union	Valencia	Military
1286	497	0	37	12	9	29	0	154	29	31	13	0	3	19	12	1	14	20	4	27	9	13	7	96	29	39	80	11	11	27	8	1	43	1

chart of LANM’s triage cases shows that they came to LANM from all but two of New Mexico’s 34 counties. Ten counties did have fewer than 10 persons each who accessed the system, but even without a rigorous outreach strategy, it is apparent that people throughout the state are likely to take advantage of its availability. This observation is not to suggest that there is not a significant need for outreach and advertising regarding the availability of the system as soon as there is comfort that the providers can handle the volume that is likely to be created.⁴

A second factor that supports the conclusion is entirely anecdotal, but compelling. Recently, NMLA has undertaken what are called “Law Fairs,” which are sessions held in remote counties where persons seeking advice and other forms of legal assistance can communicate with a lawyer in Santa Fe or Albuquerque through a Skype connection. Staff who had participated in the law fairs uniformly reported that they work well and that clients responded very positively to the remote interviews and advice. More importantly, for as an indication of potential future use of the triage portal in such areas, Law Access intake staff noted an uptick in triage interviews from the areas where the Law Fair occurred following such events.

⁴ See the discussion of outreach at p. 16.

Impact on the efficiency and effectiveness of participating legal aid providers. Several outcomes were identified as potential indicia of the anticipated increased efficiency and effectiveness of the legal aid providers who are partners in the triage system. The first is reduction of time between an applicant's initial contact seeking legal aid and the acceptance and opening of their case, or a definitive determination that is made not to provide assistance. It was also expected that data drawn from staff time records would show that less time would be spent on repetitive intake interviews and applicant screenings, freeing up more time for direct representation.

The data were inconclusive regarding the hoped-for increase in efficiency of the providers. There have not been enough cases for full representation accepted and closed to provide meaningful data for the inquiry. Detailed time records are not kept of intake and secretarial staff, so it is not possible to demonstrate the effect with hard data. Moreover, until recently very large amounts of time were devoted per case to transferring the data from the triage interview into each program's Pika case management, since the automated feature was not functioning.

Nevertheless, there was widespread anecdotal agreement with the observation that financial screenings on callbacks to triage applicants were significantly faster, because the interviews involved affirming what was already in the system, rather than having to type it from scratch. Screeners were described as "...loving to verify information that's already in the system." One supervisor noted: "My intake screeners are just glowing about this." It was also observed that it is better for clients who when callbacks do not have to undergo a lengthy interview regarding financial eligibility.

It was also noted that the triage system filters over income persons and individuals seeking criminal representation or assistance outside of either program's priorities.

Project Objective C: Improve legal services providers' efficiency and effectiveness by creating a bilingual (English/Spanish) version of the triage tool for Spanish-speaking persons.

To date, no Spanish language version of the triage tool has been developed. It is planned for and recognized as being essential, but there has not been adequate time and resources to devote to it since finalizing the version that went live, subject to further revision, in April, 2015. Staff in the partner programs have now been trained by the Project's partner Neota Logic in how to insert content into the system, which will be necessary for them to develop and put in place a Spanish-speaking component.

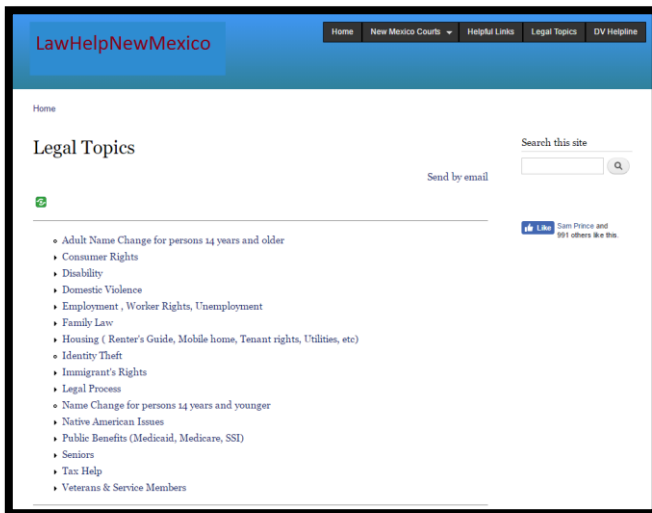
Given the large number of Spanish-speaking low income persons in New Mexico, it is imperative that efforts begin at the earliest opportunity to develop and implement this aspect of the triage tool.

Project Objective D: Increase low income persons' access to legal information and resources by developing and publishing on the statewide website new self-help and legal education materials.

A key component of the vision for the triage system is a robust self-help capacity that persons being interviewed can be referred to for self-help guidance specific to their particular situation. The Project Goals set forth in the Systems Requirements state: “Where possible, the system will offer the user multiple options, for example, the opportunity to pursue self-help before seeking assistance from an attorney.” The vision is for the triage tool to prepare a written summary of recommended resources or services tailored to person’s need and a detailed resource sheet that may include self-help resources.

A considerable amount of work remains to be done to achieve this aspect of the vision for the online triage system. During its early months as the online triage Project got underway, New Mexico’s statewide legal aid practice groups examined available self-help materials in the areas targeted for coverage in the triage tool: family, consumer, housing, and public benefits. Some work was undertaken to update materials, including the development of a 72 page “Renters Guide,” which covers every aspect of New Mexico’s landlord-tenant law in detail.

The principal vehicle for the self-help tools is NMLA’s self-help website, LawHelpNewMexico (<http://lawhelpnewmexico.org/>). Development of the self-help website is still in



progress. The website is set up to explain various aspects of New Mexico law in a direct narrative fashion. It does yet provide precise “self-help” guidance, though for relatively highly-literate English-speaking users, it offers a vehicle for a better understanding of their legal issue in the topics addressed on the website. With the exception of the “Renters Guide,” it does not offer materials in Spanish.

This is an area that will need significant attention for the triage system to accomplish its full vision. Unfortunately, NMLA has been significantly impacted by severe losses in state funding, hampering its capacity to meet the need at the pace it desires.

V. Factors affecting project accomplishments

Acceptance of the System. A factor that over time will affect the efficiency and effectiveness of the provider organizations will be the degree to which it is embraced by staff of both programs. In both LANM’s and NMLA’s offices in Albuquerque where most of

the triage cases have been handled, there is widespread acceptance and even enthusiasm about the system. One lawyer who had tested the online triage tool observed: *“I really like the system. We need to let them know it's out there. I thought it was really awesome when I used it.”* Another described it as *“a step forward into the future.”*

There is less enthusiasm and some resistance in outlying offices of NMLA, where the triage system has not yet been a big factor in intake. Several such staff members, however, described it as *“inevitable.”* *“It will be particularly helpful if people using it get the information they need ‘in short order’.”* One staff member who, while expressing resistance, nevertheless, saw it as something that younger persons would embrace, *“because of their comfort working online.”*

There is also some resistance in rural areas of the state to Albuquerque-based services. This common Western pattern already affects acceptance of Law Access in some areas and was voiced as an issue in our conversations with some outlying offices. The Project is unlikely to alter fundamental social patterns, but over time a number of factors will mitigate the challenge. The first is the success and further evolution of the system to respond effectively to isolated people's needs. Even without advertising in rural areas, as noted above, people from nearly all counties in the state have found and used the system.⁵ The online survey conducted of triage interviewees found that more than 75% of them found the service by searching online, suggesting that irrespective of advertising and outreach, people will find the system. Of course, to find it on the web, people have to have access to the web.

Web access. Much of the resistance to the system expressed in outlying areas arose out of conclusion that internet access and cell coverage is extremely limited and people do not have computers in highly rural parts of the state. New Mexico is a very large, topographically and culturally diverse state and as such continues to have large expanses of terrain where there is neither web or cell access. This limitation was cited in a number of the outlying offices as a significant short and long-term barrier to the statewide success of the online triage system. As the system matures and becomes better, its host, NMLA, may need to examine the viability of setting up kiosks or partnering with social service agencies and libraries.

Native American populations. A significant portion of the client eligible communities in New Mexico are Native American. Effectively serving Native populations, including on reservation land, as does NMLA, involves a complex mix of cultural, linguistic and legal sensitivity. Tribal members' legal issues may arise in tribal courts, state courts or federal courts. Knowing the tribal affiliation of individuals seeking help and where they reside directly affects the legal advice and representation they need. As a result, it will be important for the online triage system to establish tribal identity in relation to the issue for which the individual seeks assistance. Currently the triage system asks persons who self-identify as being Native American to state the tribe to which they belong. The system does

⁵ See the discussion at p. 11 regarding geographic distribution of triage users.

not, however, yet have the capacity to tailor treatment of the case based on the complex range of factors that include tribal affiliation, residence and the substance of the legal issue.

The system will also need to respond to language issues for older Native Americans who do not read and write English and whose native tongue is not written. The pattern is for older folks to rely on younger family members, including to get online, when it is necessary. The Project will need to work closely with NMLA's Native American component and with its office in Gallup which serves a number of Native people in the four corners area and historically has had staff attorneys licensed to appear in both Navajo and Zuni Trial Courts.

Financial resources. The online triage system has implications for many aspects of the operation of its partner legal aid programs in New Mexico. Unfortunately, its implementation comes at a time when legal aid throughout the state is facing serious financial crisis because of the severe reduction in tax revenues from oil and gas. As a result, both programs have faced layoffs which affect both individuals necessary to implement the system as well as to respond to the demand that it will increasingly generate, because of its success.

Interface with Pika, the case management system. A major impediment to the online triage system's integration into the workflow at NMLA and LANM was the fact that information from the interviews was not able automatically to be transferred into the programs' case management system. Both partner programs adjusted and developed ways to transfer the data, but the result was the diversion of significant staff resources into the laborious process. Shortly before the preparation of this evaluation report, the impediment was resolved and the system is now able to function with the efficiency that had been expected.

Other impediments. The vision of the leadership of the Online Triage Project is for it to be the primary portal through which people obtain assistance from the legal aid delivery system in New Mexico. It is recognized that it cannot meet the needs of everyone in the state. Among those who will not be able to make use of the system are persons with cognitive disabilities or who are mentally ill – groups that can make up a significant portion of the client eligible population. In addition, people have to be sufficiently tech savvy to use it and so it will likely be a less comfortable medium for older persons and others who are technophobic.

Another impediment which has yet to be worked out, but of which the Project's management is well aware is the fact that call-backs do not always work well for online people. Some people have limited telephone Access and others may have a working schedule which makes it impossible to receive calls during business hours, when they typically are made by LANM and NMLA. It was suggested during the course of the interviews, as well as in one of the comments to the online survey that a question regarding the best call-back time should be added to the online interview.

VI. Strategies to address major challenges

The strategies to address challenges that arose during the development of the online triage tool were grounded in the same problem-solving, interactive management approach noted

at the outset of this report. The Project will need to draw on the same creative energy and commitment to address the next set of challenges, including meeting the two objectives of increasing access for the large Spanish-speaking community in New Mexico and developing a much more robust capacity to connect users with self-help materials tailored to their immediate situation.

Spanish version of the tool. The triage instrument will always be subject to improvement and further involvement, but it has matured to a point where its replication in Spanish can begin. It was noted in the course of the on-site evaluation that more than one version of Spanish is spoken (and written) in New Mexico. The challenge, therefore, will be not only to translate the material, but to assure its readability by Spanish-speakers throughout the state. One immediate change suggested in the course of the on-site interviews is to add a question about the language that the triage user would like to be called back in. It was pointed out that in some cases limited-English speakers have gotten help from an English-speaker when filling out the instrument, but need a callback from someone who is bilingual in their language.

Outreach. An almost universal theme among persons interviewed during the site visit in New Mexico was the need for advertising and outreach to make the availability of the triage tool better known, particularly in rural areas. The call for outreach reflects the commitment of the staff of both NMLA and LANM to help the communities served by the programs. It was certainly recognized that successful outreach would increase demand on both organizations at a time when their staffs are stretched thin by layoff and reduced resources. Any outreach strategy, therefore, will need to be accompanied by a plan to increase the availability of self-help services for those for whom there will be inadequate staff for full representation. There will be a concomitant need to develop a more robust network of social service agencies and to bring the other legal aid providers in as partners.

Outreach will also call for engaged discussion with staff and other community-serving entities in rural parts of the state in order to enhance access to the system where there is limited broadband connection with the web. An appropriate place to start may be with outreach to the Pueblos, since NMLA has a Native American component that is directed by a very highly regarded, forward-looking and effective long-term manager, who is a member of the San Felipe Pueblo.

VI. Major lessons and recommendations

Important lessons learned from this project. Projects of this complexity have to be undertaken carefully and methodically to avoid mistakes and long-term unintended consequences. This project has proceeded that way to its credit and its product reflects that effort. “Careful and methodical,” however, can also mean slower than anticipated and many key aspects of the system are still to be developed – notably a Spanish-language component and a more robust self-help support capacity.

Recommendations for other legal services programs that might implement a system or strategy of this type. A project of this type involves two parallel, equally challenging

tracks. The first is technological – how to use available technologies and anticipate developing ones to design and implement a complex system to respond to the needs of people seeking access to help for their legal issues. The second is operational – that is, how to fit a new system into the already complex operations of different legal aid providers who are partners in the system. To accomplish both calls for a management approach that commits to communication, openness and flexibility so that the technical and operational tracks reflect mutual understanding and a commitment to the long-term goal.

The second recommendation is a hopeful forward-looking one. In spite of the many challenges that this Project encountered because of the complexity described above, it was able to identify and respond to them and more importantly to put into place a replicable system which appears poised to increase the capacity of legal aid in New Mexico to serve people and to provide them with assistance appropriate to their need.

Recommendations for further development of the technology(ies) or initiative(s) developed through the project and for how they can be best adapted and used by other LSC grantees. This project began with a high level of technical proficiency among key partners, which allowed it to develop a high-level product that lies at the core of the online triage system. As it evolved, however, there was a need to support a timely and practical “non-techie” capacity to change content and logic flow for the interview questions, to modify case routing, and to be able more easily to customize information returned to clients on-screen and by email at the end of the intake/triage interview. This shift came late in the development of the system, due to technical issues and limitations on available staff expertise. Because of this, the system will now support speedier and more effective updating and sharing of content across multiple legal aid agencies.

The learning that can be drawn from this experience is the importance of making the system available to others, including transferable content that can be easily modified for use in other jurisdictions. The goal would be to develop almost “turnkey” start-up projects for other states wishing to replicate the system without having to engage high-level – and expensive – technical support. Because this project focused on integrating data transfer from the Neota system into Pika case management software, some investment will also be needed to implement similar data transfer capabilities to facilitate use in states where Legal Server or other case management software is in use.

In addition, NMLA intends to integrate data analysis strategies currently being developed through TIG #15062 to help users of this system more effectively analyze the aggregate data reports produced by the Neota software to increase the accuracy of pattern identifications based on client demographics and case outcomes as well as substantive legal information gathered from the intake interviews. These results should be easily shareable online to support wider national development of proactive advocacy strategies for common client issues.