

SOUTH COASTAL COUNTIES LEGAL SERVICES, INC.

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February 19, 2014

Mr. John Eidleman
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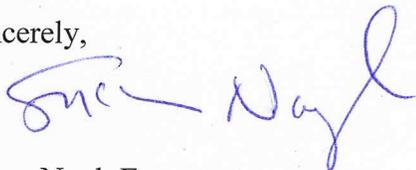
Dear John:

I want to thank you, Cynthia Schneider, and Joseph Dailing for your thoughtful report and recommendations, and for the time and effort the team invested in learning about our program.

I also want to thank you for the opportunity to provide our comments and to correct any inaccuracies in the report's findings. Our Response to your report is attached.

While I believe SCCLS delivers excellent legal advice and representation to our clients, we understand there is room to improve. Your guidance and suggestions are valuable and will be given careful consideration.

Sincerely,



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Executive Director (Ext. 2016)
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cc: Matthew Bresette, Co-Chair
Arthur Pressman, Co-Chair

South Coastal Counties Legal Services is funded by individuals, corporations, foundations, and the following partners:



Massachusetts Legal Assistance Corporation



South Coastal Counties Legal Services, Inc.
Response

Legal Services Corporation
Office of Program Performance
DRAFT

Program Quality Report

For

South Coastal Counties Legal Services, Inc.

Recipient Number: 122087

October 7-11,2013

SERVICE AREA AND PROGRAM OVERVIEW

Seventh paragraph: Funding totals from sources other than LSC include funds and the value of donated partner services used to support a statewide AmeriCorps program hosted by SCCLS. Justice Center funds also are included in the total.

SUMMARY OF FINDINGS

Seventh paragraph: While the elder law paralegal referenced in this paragraph regularly provides her number to community partners for direct referral, there is no dedicated senior telephone line.

Last paragraph: One effort by SCCLS to improve the delivery system in Massachusetts, not mentioned, involves SCCLS' AmeriCorps program. Since 2005 SCCLS has hosted an AmeriCorps program which places 28 recent college or law graduates in legal aid programs throughout the Commonwealth.

FINDINGS and RECOMMENDATIONS

PERFORMANCE AREA ONE. Effectiveness in identifying the most pressing legal needs of low-income people in the service area and targeting resources to address those needs.

Criterion 1. Periodic comprehensive assessment and ongoing consideration of legal needs.

Finding 1. SCCLS completed its last comprehensive legal needs assessment in 2011.

No substantive comment, except that SCCLS agrees with the finding and the PQV teams' statement that "Prior to the merger, South Coastal Counties Legal Services conducted an effective needs assessment during 2010 and 2011"

Recommendation I.1.1.1: SCCLS should encourage MLAC to conduct a needs assessment in conjunction with other legal services programs in the state in the next five years.

SCCLS will consider implementation of this recommendation.

Criteria 2 and 3. Setting goals and objectives, developing strategies, allocating resources and their implementation.

Finding 2. The SCCLS board participates in the review of the program's priorities that are grounded in the needs assessment and expertise of the staff.

No comment, except SCCLS agrees with the finding and with the PQV teams' statement that "SCCLS has engaged in a thoughtful process to set priorities and maximize resources to ensure that eligible clients will receive critical high quality legal services from the appropriate office."

Criterion 4. Evaluation and adjustment.

Finding 3. SCCLS is aware of and adjusts its work accordingly to address emerging needs.

No comment, except SCCLS agrees with the finding and the PQV teams' statement that "SCCLS identifies new pressing needs and problems between assessments in a number of ways that are informed by its close contacts with the client and provider."

Finding 4. SCCLS is planning to update its strategic planning process.

No comment, except SCCLS agrees with the finding.

Recommendation 1.4.4.1*: The program should engage in a strategic planning process that complements and aligns with its development efforts and plan.

No comment, except SCCLS agrees with the recommendation.

Finding 5. SCCLS does not have a methodology in place for measuring the results achieved by its work.

While SCCLS certainly can improve its efforts to measure the results achieved by its work, and identify additional tools to use in doing so, SCCLS does capture considerable outcome data, and has built reports that can be used to aggregate this data in a number of ways. (See below for additional information on outcome data collected by SCCLS) Additionally SCCLS has the ability to easily report, and does regularly report, data on client race, geographic location, income, and age to analyze the delivery of services in the context of overall community demographics. Further, as reported elsewhere by the PQV team: "The telephone intake system uses the Legal Files case management system and has a sophisticated software system that allows the staff to discern important information..." about an applicant's efforts to access services.

Recommendation 1.4.5.1: SCCLS should consider holding an annual retreat with the board and staff to review its accomplishments in light of its strategic goals and determine if the program is meeting its goals and, if not, what adjustments can be made to do so.

SCCLS will consider implementation of this recommendation.

Recommendation 1.4.5.2: SCCLS should consider conducting client satisfaction surveys of all clients using the information received in evaluating and improving its work.

SCCLS will consider implementation of this recommendation.

Recommendation 1.4.5.3: SCCLS should consider capturing outcomes in the CMS when entering case closing data.

SCCLS does capture outcomes other than level of service, hours expended, and closing codes in its case management system. Reliable outcomes have been captured by the Disability Benefits Project advocates for several years. Disability benefits advocates capture not just the data identified above, but also the amount of any monthly benefit secured or preserved, the amount of any retroactive benefit achieved, and the amount of any overpayment waived. These monetary outcomes can be aggregated in a number of ways. The number of wins versus losses also is captured.

Attorneys associated with the Battered Womens' Legal Assistance Project have been utilizing a custom outcomes window in the CMS implemented especially for this project for more than two years.

Housing advocates are able to select outcomes such as "eviction prevented," "termination of subsidy prevented," "public housing unit maintained," or "housing conditions improved" from a pick list at closing. The amount of any judgment awarded or negotiated, monthly benefit maintained or achieved (such as the monthly value of a rent subsidy), amount of rent waived, and/or attorney fees awarded or collected also can be captured. An effort to capture this information more consistently and reliably from the housing advocates was instituted approximately eighteen months ago. Benefits advocates also have begun to more reliably capture similar types of information.

SCCLS' PAI program, where possible, collects similar information for its full representation cases, and always tracks the monetary value of the services donated by a PAI attorney in an individual case.

SCCLS' statewide AmeriCorps program collects information on the number of hours expended by the AmeriCorps members and their supervisors, and the number of additional volunteer hours leveraged by the AmeriCorps members, in addition to the outcomes measures on homeless matters required by the Corporation for National and Community Service.

The statewide HomeCorps project funded by the Attorney General through MLAC, in which SCCLS participates, requires the collection of outcomes by SCCLS advocate which are aggregated by the project manager on a state wide basis.

PERFORMANCE AREA TWO. Effectiveness in engaging and serving the low-income population throughout the service area.

Criterion 1. Dignity and sensitivity.

Finding 6. SCCLS treats clients with dignity and sensitivity.

No comment, except SCCLS agrees with the finding.

Finding 7. SCCLS has a multifaceted intake system with a number of ways for applicants to access service.

SCCLS agrees with the finding, but would like to clarify that it is not SCCLS' policy to discourage walk-in applicants in the Fall River office. It is SCCLS' policy that all applicants who have made the effort to travel to an office location should be assisted with their intake.

Recommendation II.1.7.1*: SCCLS should consider having a manager other than the executive director supervise the intake staff.

SCCLS agrees. The Fall River Managing Attorney has been supervising intake staff since her return to the office in November of 2013.

Criterion 2. Engagement with the low-income population.

Finding 8. SCCLS is involved with the low-income community and the organizations in its service area providing services to that community.

No comment, except SCCLS agrees with the finding.

Criterion 3. Access and utilization by the low-income population.

Finding 9. SCCLS is committed to ensuring language access in its representation and is strengthening its internal language access.

SCCLS agrees with the finding.

Recommendation II.3.9.1*: SCCLS should continue to revise the LEP plan and conduct training on the plan.

SCCLS agrees with the recommendation.

SCCLS' language access plan had been revised by staff, with help from the Language Access Fellow, placed at the Volunteer Lawyers Project of the Boston Bar Association through the efforts of the Massachusetts Project Directors and with funding from MLAC. Through inadvertence, the wrong plan was sent to the PQV team prior to the visit. Once the revised plan is formally adopted, staff will receive training. Staff have attended statewide trainings on providing assistance to the LEP client. Staff also will be encouraged to attend this year's Language Access Coalition Conference entitled "Building Bridges through Language Access Advocacy and Collaboration."

PERFORMANCE AREA THREE. Effectiveness of legal representation and other program activities intended to benefit the low-income population in the service area.

Criterion 1. Legal representation.

Finding 10: SCCLS' advocacy staff is a significant program strength.

No comment, except SCCLS agrees with the finding, and the PQV team's statement that "The program has a very experienced, dedicated, compassionate, and highly competent staff that provides high quality legal services to their clients... The program and its work are well-respected by the judiciary, the private bar and social service community throughout its service area."

Recommendation 111:1.10.1*: The program should continue its efforts to hire a diverse staff.

No comment, except SCCLS agrees with the recommendation.

Finding 11: Overall the program performs high quality legal work.

No comment, except SCCLS agrees with the finding.

Recommendation 111:1.11.1*: The program should look for opportunities to engage in more advocacy that can achieve lasting results for the individual client and benefit the low-income population.

SCCLS agrees with the recommendation.

Recommendation 111:1.11.2*: The program should look for opportunities to bring more cases that encourage advocates to use all legal tools available to them.

SCCLS agrees with the recommendation.

Recommendation 111:1.11.3*: The program should encourage all advocates to take an active role and participate in list serves in their area of expertise.

SCCLS agrees with the recommendation. All advocates are encouraged to, and most do, participate in list serves and in task forces in their areas of expertise.

Finding 12: Legal work supervision could be improved with formal systems in place.

SCCLS agrees with the finding.

Recommendation 111:1.12.1*: Notwithstanding the experience of the staff, SCCLS should adopt more specific standards of practice for case handling staff. These standards include policies on uniform calendaring and ticker dates, file maintenance and use of Legal Files, and case handling standards. These standards should be incorporated into individual work plans and adjusted depending on the level of experience of the staff member.

SCCLS agrees with the recommendation.

Recommendation 111:1.12.2*: SCCLS should develop supervisory standards for managing attorneys.

SCCLS agrees with the recommendation.

Recommendation 111:1.12.3*: SCCLS should institute the practice of regular case reviews conducted by the case handler's supervisor for experienced staff and case reviews with greater frequency for inexperienced staff.

SCCLS agrees with the recommendation.

Recommendation 111:1.12.4*: As resources permit, SCCLS is encouraged to hire a director of advocacy who would provide program wide advocacy coordination and support for litigation.

SCCLS will consider implementation of this recommendation.

Finding 13. The program's closed case statistics appear to be appropriate for a program of its size.

SCCLS agrees with the finding. SCCLS notes that the merger of SCCLS and NCLA occurred in July of 2011. A majority of cases closed that year were closed by NCLA, which operated a modified hotline model of service delivery. SCCLS has decided to provide more full representation and from 2011 to 2012 extended service cases increased from 8.7% to nearly 30% of LSC supported cases. In 2012, SCCLS, together with the Justice Center, closed over 3000 cases. Approximately 1000 were closed by the Justice Center. The closed case number appearing in the report references only those cases closed at SCCLS and supported with LSC funds.

Finding 14. SCCLS staff has many opportunities for training.

No comment, except SCCLS agrees with the finding

Recommendation 111:1.14.1: SCCLS should formalize a written development plan for all new advocates that address training among other issues and follow the plan in order to develop the advocates' skills. Professional development activities should be part of SCCLS work plans - regardless of the experience of the attorney.

SCCLS agrees with the recommendation.

Criterion 2. Private attorney involvement.

Finding 15. SCCLS has an active, effective, and multifaceted approach to private attorney involvement and provides a number of opportunities for private attorneys to participate in pro bono activities.

SCCLS agrees with the finding. SCCLS would like to clarify that the number of participating attorneys is 160 and not 115.

Recommendation 111:2.15.1: The evaluation team recognizes the difficulties in securing pro bono help in counties that have few members of the bar and little or no history of pro bono work. To address this, SCCLS should consider trying to recruit people who live in those counties but who work in Boston or other cities in the area.

SCCLS will consider implementation of this recommendation.

Recommendation 111:2.15.2: The program should consider having the pro bono coordinator supervised by a senior experienced attorney other than the executive director.

SCCLS will consider implementation of this recommendation.

Criteria 3 and 4. Other program services and activities on behalf of the eligible client population.

Finding 16. SCCLS conducts extensive pro se activities.

SCCLS agrees with the finding.

PERFORMANCE AREA FOUR. Effectiveness of governance, leadership and administration.

Criterion 1. Board governance.

Finding 17. On the whole the board is actively engaged in the work of the program and dedicated to its mission.

Recommendation IV.1.17.1*: SCCLS should establish a formal training for new board members and a routine update on board responsibilities for all board members.

SCCLS agrees with the recommendation.

Recommendation IV.1.17.2*: SCCLS should develop a board manual.

SCCLS agrees with the recommendation to create orientation materials for new Board members.

Recommendation IV.1.17.3: The board should continue its support in resource development.

SCCLS agrees with the recommendation.

Criterion 2. Leadership.

Finding 18. The executive director provides strong focused leadership to SCCLS.

SCCLS agrees with the finding. The Executive Director began serving as interim director in April of 2012. She was chosen as Executive Director in November of 2012.

Recommendation IV.2.18.1*: The board should complete the evaluation of the executive director.

SCCLS agrees with the recommendation.

Recommendation IV.2.18.2: As the financial situation stabilizes, the executive director, in consultation with the board, should evaluate the need for staff development and cross training to provide some back up in key areas such as finance and legal work supervision.

SCCLS will consider implementation of this recommendation.

Criterion 3. Overall management and administration.

Finding 19: SCCLS' management team includes key personnel.

SCCLS agrees with the finding.

Recommendation IV.3.19.1: SCCLS should review its Emergency and Disaster Recovery Plan Outline and address a number of critical issues to ensure it is a viable plan that fulfills the program's goal of ensuring the safety of its constituents. The American Bar Association's *ABA Lawyers Guide to Disaster Planning* provides a helpful tool for reviewing and drafting a Business Continuity Plan.

SCCLS agrees with the recommendation.

Criterion 4. Financial administration.

Finding 20. The program appears to have adequate financial policies, procedures and practices in place.

SCCLS agrees with the finding.

Recommendation IV.4.20.1: SCCLS should review and carefully consider whether the addition of even a part time bookkeeper might be critical to maintain adequate records and prepare timely financial reports as the program expands its resources.

SCCLS will consider implementation of this recommendation.

Criterion 5. Human resources administration.

Finding 21. The program's human resources administration is handled by the executive director and the assistant to the executive director.

SCCLS agrees with the finding.

Criterion 6. Internal communication.

Finding 22. SCCLS uses several methodologies to assure effective internal communication.

SCCLS agrees with the finding.

Finding 23. SCCLS' technology is, on the whole, adequate and sustained by staff with support of an outside contractor.

SCCLS agrees with the finding.

Recommendation IV.6.23.1: The SCCLS technology use policy needs to be updated to account for changes in the use of technology since last reviewed.

SCCLS agrees with the recommendation.

Recommendation IV.6.23.2: To encourage uniform use of technology among staff, it may be useful to create minimum expectations for staff in this area such as use of central electronic calendars and keeping case notes and documents in Legal Files. Once these standards are adopted, training must be made available to staff to ensure their compliance with the standards.

SCCLS agrees with the recommendation.

Criterion 7. General resource development and maintenance.

Finding 24. SCCLS emphasizes obtaining additional funding for the program.

SCCLS agrees with the finding.

Criteria 8 and 9. Coherent and comprehensive delivery structure/Participation in an integrated legal services delivery system.

Finding 25. SCCLS is engaged in a comprehensive and integrated service delivery system.

SCCLS agrees with the finding.