

**LEGAL SERVICES CORPORATION  
TECHNOLOGY INITIATIVE GRANT PROGRAM  
FINAL REPORT**

**Grantee name:** Montana Legal Services Association  
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## **I. Project Goals and Objectives**

The goal of this project was to extend and expand work initiated under a 2004 TIG grant to use LiveHelp as a tool to serve clients, support attorneys, and make access-to-justice systems more accessible and efficient. In 2004, MLSA received a pilot grant to partner with Pro Bono Net (PBN) and Iowa Legal Aid (ILA) to develop LiveHelp, a feature which provides real-time, chat-based assistance for MontanaLawHelp.org and IowaLegalAid.org website visitors. Through an online chat, trained website Specialists are able to immediately direct the website visitors to appropriate legal information or referral resources. If a Specialist is unavailable, the visitor can choose to leave a message and receive the information in an e-mail. In situations where legal advice may be needed, the Specialist will inform the visitor how they can apply for legal services or contact a lawyer referral service. LiveHelp uses the LivePerson Pro software (<http://www.liveperson.com>).

LiveHelp was launched in Montana and Iowa in June 2006. An extensive evaluation of those pilot projects was conducted in 2007.<sup>1</sup> An interim analysis of LiveHelp replication opportunities was also conducted in 2007.<sup>2</sup> Based on the promising results of the pilot evaluation and replication study, MLSA, along with three partners, ILA, PBN and the Georgia Legal Services Program (GLSP) and its State Bar of Georgia Pro Bono Project, proposed a focused expansion of LiveHelp with three objectives. This project succeeded in expanding and enhancing the effectiveness of LiveHelp and achieved the specific goals identified in the grant:

1. Implement LiveHelp on GeorgiaAdvocates.org to support and enhance pro bono participation in Georgia;
2. Integrate LiveHelp with document assembly in Montana to enable clients to more easily and effectively generate forms and letters;
3. Pilot a cross-jurisdictional approach to delivering LiveHelp assistance.

No significant changes were made to the goal or objectives over the course of TIG #06544.

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<sup>1</sup> See LiveHelp Pilot Project Final Evaluation Report, <http://www.probono.net/link.cfm?9421>

<sup>2</sup> See Interim LiveHelp Replicability Assessment, <http://www.probono.net/link.cfm?9989>

## **II. Evaluation Data and Methodologies**

Several methods and data sets were used to assess the project's accomplishments. The data and methods do not deviate significantly from those listed in the approved TIG evaluation plan, which is included in Appendix A for reference.

### **Website and LiveHelp Usage data**

Pro Bono Net reviewed usage data for both website visitors and LiveHelp users. Website usage data included site visitors and key page views in order to track the percentage of site visitors who used LiveHelp. LiveHelp usage data included chat and after-hours email statistics.

### **LiveHelp User Survey Data**

At the end of a chat with a Specialist, LiveHelp users are asked if they are willing to complete a survey. PBN reviewed exit survey data from approximately 30 LiveHelp users who completed the survey.

### **Specialist Surveys**

PBN reviewed data from approximately 20 post-chat surveys of Specialists. The survey is presented automatically to Specialists upon the completion of each chat, and asks questions regarding the interaction with the visitor, suggestions for website content, and training needs.

### **Semi-Structured Interviews of Specialists and Managers**

PBN spoke to six specialists and project managers about their experience providing LiveHelp assistance in these areas, the training offered, and their opinions on the underlying evaluation questions.

### **Review of Chat Transcripts**

The transcripts of each LiveHelp chat are archived in the system for 13 months. There was detailed qualitative review of stored transcripts.

### **Administrative Documentation**

PBN also reviewed project documentation, including: 1.) a systems specification document for integrating LiveHelp with online document assembly in Montana; 2.) summaries of technical testing conducted; 3.) a log of observations kept by participants in the cross-jurisdictional test, and 4.) minutes from project team meetings.

## **III. Summary of Major Accomplishments, Recommendations and Future Steps**

### **Accomplishments**

This project has succeeded in deploying LiveHelp in three key areas that warranted further assessment based on the findings of the #04543 pilot project:

- LiveHelp has been successfully integrated with the first statewide advocate site, GeorgiaAdvocates.org, and Specialists have been trained on how to support and answer questions from advocate and pro bono users.

- The LiveHelp functionality has been integrated with the national NPADO server<sup>3</sup> and the service is available to users of online dissolution and parenting plan forms in Montana. A team of experienced MLSA Specialists has been trained to provide assistance to online forms users.
- The cross-jurisdictional pilot was conducted as planned between Specialists in Montana and Iowa with promising results, and has already been replicated in several contexts described in more detail in Section IV: In-Depth Analysis of Accomplishments. This cross-jurisdictional pilot also succeeded in laying the foundation for deploying LiveHelp in a rapid-response or disaster relief scenario.
- This project has successfully expanded the ways LiveHelp is coupled with, and supports, other online access to justice systems used by the legal services community. In addition, this project has given project partners and the national community a deeper understanding of the local and national support needed to successfully implement LiveHelp initiatives. Finally, this grant has supported the continued growth of LiveHelp in the original pilot states, Montana and Iowa, which now offer strong, mature models for how LiveHelp can enhance client services delivery.

Along with these accomplishments, project partners identified several recommendations for future steps:

- Collect longer-term data on the use of LiveHelp with MLSA’s family law document assembly forms, the optimal functionality needed to assist document assembly users, and expansion potential;
- Create multiple access points to LiveHelp on GeorgiaAdvocates.org to support additional users;
- Explore additional cross-jurisdictional delivery models, for example to provide specialized language assistance or substantive support across states;
- Create a LiveHelp disaster relief deployment plan and recruit and train a cadre of navigators nationally as a rapid-response team;
- Build capacity at Pro Bono Net to support local LiveHelp replication initiatives in these areas and successful project expansion.
- Continue developing a national LiveHelp Project Manager’s network to support dissemination of resources and best practices.

These recommendations are discussed further in Section V: Major Lessons and Recommendations.

#### **IV. In-Depth Analysis of Accomplishments**

As described in Section I, the overall goal of TIG #06544 was to further assess how and when LiveHelp can be effectively used as a tool to serve clients, support attorneys, and make access-

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<sup>3</sup> The NPADO server, [www.npado.org](http://www.npado.org), is the national server that allows legal aid clients, advocates and pro bono attorneys to create interactive legal forms and documents. It is hosted by Pro Bono Net and supported by the TIG program.

to-justice systems more accessible and efficient. Three objectives were set out in order to achieve this goal:

- Implement LiveHelp on GeorgiaAdvocates.org to support and enhance pro bono participation in Georgia;
- Integrate LiveHelp with document assembly in Montana to enable clients to more easily and effectively generate forms and letters;
- Pilot a cross-jurisdictional approach to delivering LiveHelp assistance.

Each of these objectives is discussed below.

### **Implement LiveHelp on GeorgiaAdvocates.org to support and enhance pro bono participation in Georgia.**

LiveHelp has been successfully deployed on GeorgiaAdvocates.org, Georgia's statewide advocate site, and is being used by site visitors for a variety of needs. This was the first time LiveHelp was deployed on a statewide advocate site, and there were no major technical barriers to implementing the LiveHelp functionality on a probono.net advocate site using the LivePerson software

As part of the project, GLSP developed and populated the LiveHelp system with the required content elements. This included a post-chat survey, a Specialist survey, and an offline survey through which visitors can submit questions after-hours. In addition, GLSP developed a set of preconfigured responses to answer common questions from volunteers and advocates such as information about volunteering, finding library resources, using HotDocs templates, accessing webcasts and videos, and password help. More than 20 FAQs were developed and categorized in an HTML tree in the LivePerson system that Specialists could easily access in the course of a chat.

PBN staff conducted three trainings for the GLSP project manager on the LivePerson administrative console, where content, user accounts and reports are managed, and the LivePerson operator console, where Specialists interact with website visitors. Seven GLSP staff were recruited and trained as LiveHelp Specialists. Surveys of key project staff indicated they were "very satisfied" with the trainings they received on the LivePerson administrative and operator consoles and felt prepared for their role as Specialists.

The project launched in late December 2007 with limited; the hours of operation were expanded in 2008 to 9pm-5pm.

GLSP conducted significant outreach to pro bono attorneys and access to justice partners before and after the launch through presentations, e-communications and printed materials. Of particular note is an article about GeorgiaAdvocates.org highlighting LiveHelp's launch that published in the December 2007 issue of the State Bar of Georgia Bar Journal, reaching more than 37,000 attorneys.<sup>4</sup>

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<sup>4</sup> See <http://gabar.org/public/pdf/GBJ/dec07.pdf>

Since LiveHelp’s launch, GeorgiaAdvocates.org visitors have used LiveHelp’s real-time chat or offline email option more than 100 times to ask questions and contact GLSP pro bono staff. Examples of the scenarios in which LiveHelp assisted website visitors include:

<b>Help Sought</b>	<b>Help Given</b>
Site visitor inquiring about programs offering volunteer opportunities	Information about how to contact programs in his area and become a member of GeorgiaAdvocates.org.
Volunteer looking for forms on wills and estates	Information about becoming a site member and links to appropriate forms.
User looking for information on foreclosure prevention and loan modification programs	Guidance on using the search engine to locate content and information about related resources on LegalAid-GA.org.
Pro bono coordinator requesting assistance using the site’s e-mailing tool to send an announcement to pro bono attorneys	Provided assistance with using the tool and locating technical documentation for it.
Newly promoted supervisor looking for training materials	Provided links to training resources in the GeorgiaAdvocates.org library.
Site member looking for materials from a recent paralegal training	Provided information about where to find the materials and help with a password issue.
Individual seeking assistance in a wrongful termination case	Provided information about how to contact the Lawyer Referral Service.

When LiveHelp was available, the average “wait time” for a Specialist to respond was less than 8 seconds. In post-chat surveys of six LiveHelp users, all six indicated their questions were answered thoroughly, in a timely manner, and with professionalism, and that they would use LiveHelp again for support. A qualitative analysis of a sample of 10 chat transcripts from Georgia indicated that the users were provided assistance or information they otherwise were not aware of or would not have been able to find. In addition, the chat transcripts provide a feedback loop for website administrators on common questions, which can be incorporated into website content and enhancements. Finally, the preconfigured questions and evaluation instruments developed by GLSP under this grant will serve as models for future advocate site implementations of LiveHelp.

**Integrate LiveHelp with document assembly in Montana to enable clients to more easily and effectively generate forms and letters**

As a result of this project, the LiveHelp functionality has been integrated with the national NPADO server and was launched on MLSA's dissolution and parenting plan forms on MontanaLawHelp.org in April 2009, with a team of four trained Specialists available to assist online form users. LiveHelp requests are being routed to the designated Specialists, and Specialists are able to assist document assembly users by chatting with them, providing pre-configured responses to frequently asked questions, and referring them to useful resources on MontanaLawHelp.org or other websites. MLSA created a tree of more than 20 of these FAQs in the LivePerson system, addressing issues such as safety and legal referrals, and including links to partner websites where appropriate.

As mentioned earlier, LiveHelp is implemented with the LivePerson Pro software (<http://www.liveperson.com>). LivePerson is an ASP and the Pro chat solution is provided on a hosted basis through a contract with Pro Bono Net. In order to accomplish this integration objective, the NPADO tech team first integrated the LivePerson chat functionality with the NPADO server, which runs HotDocs 2007. Next, PBN generated the HTML code required to deploy LiveHelp on a website. The first portion of code, the "monitor" code, was integrated in the necessary place on all pages on the NPADO development server. The second portion of code, the "button" code, was integrated in the appropriate field in MLSA's templates. Lastly, the appropriate field on the template properties page was selected in order for the LiveHelp button to display on those templates. Extensive testing was conducted in the NPADO development environment first and several adjustments made before the chat functionality was rolled out on MLSA's live templates. These adjustments helped to optimize the placement and visibility of the chat button.

In parallel to the technical integration process, MLSA developed the necessary content to support LiveHelp for online forms, including preconfigured responses for frequently asked questions and pre-chat, post-chat and Specialist surveys. After being finalized in Word, the preconfigured messages and surveys were constructed in the LivePerson administrative console so that they could be presented automatically, or with the click of a button, during the course of the chat. In addition, MLSA developed the necessary protocols to guide Specialists and recruited four senior MontanaLawHelp.org LiveHelp Specialists for the document assembly pilot. PBN and MLSA then conducted training for these Specialists on using the LivePerson software in a forms environment.

PBN interviewed two LiveHelp Specialists providing forms assistance about the training provided and content and tools available to assist website visitors. Both Specialists had strong positive feedback about the training they had received and indicated it had fully equipped them with the skills they needed to assist visitors. They also had positive feedback about the usability of the LivePerson system, and indicated they enjoyed their overall experience as Specialists. One noted that the well-developed, comprehensive content on MontanaLawHelp.org was a big help and described the LivePerson software as "very user-friendly." Another commented that "the folks who do the LiveHelp navigation here support each other nicely" and said that MLSA's internal instant-messaging client, PSI, has allowed him to ask other Specialists questions for help when needed, which results in better information for the LiveHelp user.

Between April 30, 2009 and November 30, 2009, approximately 25 MLSA forms users asked questions through the LiveHelp online and offline capability. Below are sample questions culled from a qualitative analysis of transcripts and offline emails:

- Getting started with forms
- Registering and logging in
- Logging back in to access forms in progress or retrieve answers
- Printing forms
- Other technical questions (viewing forms, browser questions)
- How to check with the courts on the status of a form
- General questions about help with family law issues

In addition, one user initiated a LiveHelp chat while using Montana's forms and told the Specialist, "I just want to let you know I love this program, thank you." In situations where legal advice was needed, the Specialist referred the visitor to related information on MontanaLawHelp.org or the court website, and provided them with information about how to contact an advocate for advice. Four post-chat exit surveys were completed. Three users rated their satisfaction with the LiveHelp service at the highest level, 9. One user rated it an 8.

While additional usage and exit survey data is needed over time to fully assess the extent to which LiveHelp enables document assembly users to more easily and effectively assemble their documents, a review of LiveHelp questions and transcripts to date suggests the help provided is useful and meaningful, and is an important complement to the LiveHelp service on MontanaLawHelp.org. The service also provides an important feedback loop about user experience completing online interactive forms to help improve local and national NPADO projects. This feedback helps to improve the technical usability of the forms and the support materials provided to forms users. Through pre- and post-chat surveys of LiveHelp users, MLSA is now able to collect data about whether the visitor has used the site to create forms before, how they heard about the site, what kind of help they needed, and satisfaction levels with the service. In addition, MLSA now has in place a more seamless help system for users of both MontanaLawHelp.org and its online family law forms content. Visitors can initiate a chat either on MontanaLawHelp.org, or after they have browsed to the forms on the NPADO.org server. During this time period, MontanaLawHelp.org LiveHelp navigators responded to a number of forms-related questions from users who had not yet browsed to the forms themselves.

The LivePerson functionality was integrated with the NPADO server as specified in the Systems Specification document submitted as milestone 2, payment 2 under this grant. The integration method used will allow LiveHelp to be enabled for document assembly templates in other states should the project expand beyond the Montana pilot. Moreover, functionality was added to the NPADO server to enable LiveHelp on a template-by-template basis, allowing partners to offer a variety of levels of service. Testing in Montana identified certain limitations in how the two third-party systems (LivePerson and HotDocs) interact in LivePerson's co-browse mode. These are discussed in more detail in Section V.

Project partners identified the following non-technical factors that influence the extent to which other organizations can readily adapt LiveHelp for document assembly support:

- Navigators are relatively experienced and comfortable with the LiveHelp technology, and have been trained on using it in an online forms environment;
- Policies and support are in place that define the parameters of the assistance being given to forms user;
- Navigators are familiar with resources on the statewide client and other approved sites in the event the forms user needs other self-help materials or referral information;
- Navigators are familiar with general legal information concepts related to dissolution and parenting plans, such as that marital property can be divided by the court, how child support is established, how service of process works, etc.

### **Pilot a cross-jurisdictional approach to delivering LiveHelp assistance**

The third objective under this grant was to pilot a cross-jurisdictional approach to delivering LiveHelp assistance to create a cost-efficient staff or volunteer pool. The pilot confirmed the feasibility of cross-jurisdictional LiveHelp, and as a result of this project, it is being successfully replicated in other areas. This objective was accomplished, and based on the promising results of the pilot has already been successfully replicated in several contexts.

As background on this objective, after Hurricane Katrina, the need for a rapidly-deployable disaster support tool became obvious to many, as legal aid staff in the Gulf States were overwhelmed as they tried to piece their own lives together as well as help an enormous number of clients. Soon after the first Montana and Iowa LiveHelp pilot projects launched in 2006, project partners recognized that LiveHelp could potentially be a powerful disaster support tool. With appropriate prior planning and readiness, staff or volunteers from other areas could be quickly trained to respond to LiveHelp requests initiated in the affected region. This would allow the local legal aid programs in the affected areas to help those most in need, while volunteers from across the nation can support those who are able to resolve their problems on their own.

MLSA, ILA and PBN developed a pilot to mimic this situation and assess three areas: 1) the level of knowledge of the website and local context navigators need; 2.) what navigator training, support and supervision is required; and 3.) what technical adjustments to the system are needed to facilitate the delivery model.

Prior to the launch, MLSA and ILA identified a team of four experienced Specialists to participate in the pilot. PBN staff then configured the LivePerson system to support cross-jurisdictional assistance. This involved a quick adjustment to assign cross-jurisdictional Specialists to the “skill” group of the other state, and testing to ensure the functionality worked as expected. Over the course of several meetings, MLSA, ILA and PBN ironed out a plan for the pilot, including the hours cross-jurisdictional assistance would be offered, cross-state support and supervision, and protocols for handling challenging questions. The MLSA and ILA Specialists familiarized themselves with the respective state’s website content, canned responses and referral methods. In addition, the Specialists shared browser bookmarks for approved referral websites so they would have quick access to local court, law library and agency websites.

The cross-jurisdictional pilot was launched in early September 2007 and continued as planned through November 2007. If a question arose the Specialist needed help with, they were able to

use PSI, an instant client supported by MLSA, to instantly contact the local LiveHelp project manager for guidance. The pilot was designed as an intensive short-term test rather than a permanent activity. However, based on their positive experience assisting IowaLegalAid.org website visitors cross-jurisdictionally, two MLSA Americorps\*VISTA Specialists participated in an expanded test to assist LawHelp.org/LA visitors when Louisiana's law student Specialists needed to reduce their hours during final exams and winter break. The two MLSA volunteers filled in cross-jurisdictionally to ensure LiveHelp was available more consistently until the students returned in early January. The MLSA Specialists received guidance and support when needed from the Southeast Louisiana Legal Services statewide website coordinator.

The potential for cross-jurisdictional LiveHelp assistance in a disaster relief situation was underscored during the major floods in Iowa in June 2008, which impacted several ILA offices. In spite of local power outages and temporary closures of some offices, the availability of LiveHelp was unaffected. ILA was able to maintain steady hours of LiveHelp availability, in large part because the decentralized nature of the service allows it to be staffed from multiple locations around the state. PBN's LiveHelp Americorps\*VISTA volunteer was on standby to assist Iowa's LiveHelp navigators during this period and monitored traffic in the LivePerson operator console in the event that local navigators needed assistance.

Between September 2007 and June 2008, LiveHelp Specialists in Montana and Iowa took 81 cross-jurisdictional chats. A comparison of exit survey data from cross-jurisdictional and in-state chats indicated there was no significant difference in user satisfaction data when the Specialist was out of state. User satisfaction remained high across the board, with an average satisfaction level of 7.04 out of 9 and 33% of respondents rating the service at the highest level (9). As such, it appears the cross-jurisdictional service was seamless from the end-user perspective. The participating Specialists kept a log of their observations in a project wiki and held conference calls with PBN staff at the beginning and end of the pilot to reflect on the experience.

Additional cross-jurisdictional activity has taken root more recently. ILA has a volunteer LiveHelp Specialist based in New Mexico, and MLSA trained a summer law student intern based in Iowa to provide LiveHelp on MontanaLawHelp.org.<sup>5</sup> In addition, ILA's project manager has used cross-jurisdictional functionality to provide peer monitoring and support of new LiveHelp initiatives. Other LiveHelp initiatives have expressed interest in exploring cross-jurisdictional approaches to provide specialized language or substantive assistance.

## **V. Factors affecting project accomplishments and strategies implemented to address major challenges.**

Project partners substantially achieved the goals and objectives of TIG #06544. This success was bolstered by several factors, including the groundwork laid by the TIG #04543 MLSA, ILA and PBN pilot projects, strong local leadership at MLSA, ILA and GLSP combined with a national support capacity at PBN, and an emphasis on the human elements (training, management and good content) to deliver high-quality LiveHelp service. Challenges encountered, and strategies to address them, included:

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<sup>5</sup> Cross-jurisdictional activity continued expanding in the 2007 program year. See TIG 07543 Final Evaluation report for a description.

**Encouraging early user adoption on GeorgiaAdvocates.org.** As the first statewide advocate site to implement LiveHelp, Georgia was piloting assistance for a new audience and needed to educate site users about its availability. As evidenced in the TIG #04543 pilot projects, adoption of LiveHelp, in particular in the early months, is very sensitive to marketing and the hours of availability. In addition to conducting marketing during LiveHelp’s launch, Georgia project staff have integrated LiveHelp with ongoing website marketing. Georgia also expanded the hours during which LiveHelp assistance was offered.

**Integrating Two Third-Party Systems.** During tests of LiveHelp with online document assembly in Montana, certain limitations were observed in how the two third-party systems (LivePerson and HotDocs) interact in LivePerson’s co-browse mode. HotDocs templates use Javascript in certain fields and menus. Where complex Javascript is used in HotDocs, LivePerson’s co-browse mode does not always “see” the underlying field or page. The co-browse functionality was not used intensively in this pilot and Specialists were trained on workarounds in the event they needed it. Instead, partners used an alternative but similar mode in LivePerson, Page Viewer, to view the underlying form.

**Preparing Specialists for the Cross-Jurisdictional Test.** The cross-jurisdictional pilot was a groundbreaking activity and has few corollaries in legal aid. Understandably, participating Specialists and Managers had some anxiety about how to prepare adequately for helping users in another state, where the nature of the questions might be quite different. There was also concern about having enough time to respond to chats in two states. These challenges were addressed by investing time up front in training, sharing FAQs, and putting in place a meaningful support structure. For the first several weeks, cross-jurisdictional shifts were scheduled at a time when the project manager from the receiving state was available as back-up. This approach was made possible by the use of PSI, the internal messaging client supported by MLSA and used by project participants. Project participants also met by conference call several times during the test to fine-tune the activities. Finally, Specialists observed that the similar structures of MontanaLawHelp.org, IowaLegalAid.org and LawHelp.org/LA websites made it easier to familiarize themselves with the content and find resources.

## **VI. Major Lessons and Recommendations**

Several important lessons were learned through TIG #06544.

LiveHelp is a valuable and cost-effective tool for helping web users, whether clients or advocates, obtain the resources they need. It continues to have significant replication potential in a variety of contexts. It also provides benefits to the core goals of other TIG-funded projects, notably statewide websites and online document assembly, by providing tailored support to those visitors who need the additional help. Through the survey, transcript and robust reporting functionality supported in LivePerson, LiveHelp also provides invaluable individualized data about statewide website and document assembly users, their needs, and the impact these resources have on their ability to obtain access to justice.

Recommendations for further LiveHelp integration in Georgia include:

1. Create additional access points to LiveHelp on GeorgiaAdvocates.org to support users at different stages of their search;
2. Develop additional LiveHelp content that cross-references LegalAid-GA.org for people seeking legal help;
3. Consider expansion of the service to LegalAid-GA.org, Georgia's statewide client site.

LiveHelp integration with online document assembly in Montana was the first step of a significant opportunity to increase services available in areas where existing self-service approaches are incomplete or insufficient. Recommendations in this area include:

1. Collect longer-term data on the use of LiveHelp with MLSA's family law document assembly forms;
2. Further assess the optimal functionality needed to assist document assembly users;
3. Explore expansion possibilities with the courts and remotely located self-help centers.

With adequate local and national support, cross-jurisdictional assistance has significant potential in disaster relief and other delivery contexts. The cross-jurisdictional test successfully modeled a powerful new collaborative approach to delivery LiveHelp services than has the potential to expand both the quantity and efficiency of assistance provided. Experience shows that navigators need not be based in a legal aid program; they could be based in other types of programs. However, certain pieces must be in place for the promise of cross-jurisdictional activity to be realized. Navigators must have the time to be able to assist visitors in other states. They must be relatively experienced and comfortable with the LiveHelp technology, and be trained on local policies, protocols and content. The body of canned chats should be sufficient and include information about local variations, such as intake hours and what people need to know before contacting a legal aid office. Finally, programs must use a common LiveHelp technology platform that can be easily configured for cross-state assistance and does not require navigators to learn and operate separate systems concurrently. Recommendations in this area include:

1. Create a LiveHelp disaster relief deployment plan and recruit and train a team of experienced Specialists to serve as a rapid response team;
2. Pilot additional cross-jurisdictional delivery models, for example to provide specialized language assistance or substantive support across states;
3. Further develop national capacity at PBN to effectively coordinate training, support and implementation of cross-state or national delivery models.
4. With national support through PBN, continue developing a LiveHelp Project Manager's Network to disseminate resources and best practices, and optimize cross-state collaboration.

Following these recommendations should help LiveHelp to grow and create an integrated, high-quality support system across multiple online access to justice systems.

**Appendix A: TIG #06544 Approved Evaluation Plan**

**Montana Legal Services Association  
LiveHelp Project  
Evaluation Plan Framework  
TIG 06544**

**Grantee name:** Montana Legal Services Association  
**Submission date:** November 2007; revised submission September 2, 2008

**TIG grant number:** #06544  
**Approval date:** September 3, 2009

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**Goal:** Expand the use of LiveHelp to increase the ability of low-income persons to complete court and enhance the effectiveness of pro bono representation and to further assess how and when LiveHelp can be most effectively used as a tool to serve clients, support attorneys, and make access-to-justice systems more accessible and efficient.

<b>Project Objectives</b>	<b>Strategies/Activities to Achieve Objectives</b>	<b>Evaluation Questions</b>	<b>Evaluation Data</b>
<p>1. Implement LiveHelp on GeorgiaAdvocates.org to support and enhance pro bono participation in Georgia.</p>	<ul style="list-style-type: none"> <li>• Integrate the LiveHelp product with the GeorgiaAdvocates.org website.</li> <li>• Develop the necessary content and tools to launch LiveHelp on GeorgiaAdvocates.org.</li> <li>• Recruit and train the LiveHelp “website specialists” (i.e., staff providing LiveHelp assistance)</li> <li>• Conduct outreach to potential pro bono attorneys and access to justice community partners.</li> <li>• Implement processes to incorporate website visitor feedback into content development and site design.</li> </ul>	<ul style="list-style-type: none"> <li>• To what extent are GeorgiaAdvocates.org website visitors opting to use LiveHelp?</li> <li>• To what extent does LiveHelp enable website visitors find the information that they are seeking?</li> <li>• How effective was the staff training?</li> <li>• To what extent do website visitors find LiveHelp useful?</li> <li>• To what extent does LiveHelp enable website coordinators to more effectively and efficiently provide client services?</li> <li>• To what extent is LiveHelp a cost-effective use of program resources?</li> </ul>	<ul style="list-style-type: none"> <li>• Usage trends</li> <li>• LiveHelp post-chat visitor surveys</li> <li>• Semi-structured interviews/focus group of Website specialists</li> <li>• Training assessments</li> <li>• Administrative, anecdotal and other data provided by project partners, staff, and users regarding:               <ul style="list-style-type: none"> <li>a. impact on client services</li> <li>b. staffing requirements</li> <li>c. staff development (e.g., training)</li> <li>d. identifying areas for website</li> </ul> </li> </ul>

Project Objectives	Strategies/Activities to Achieve Objectives	Evaluation Questions	Evaluation Data
			improvements
<p>2. Integrate LiveHelp with document assembly in Montana to enable clients to more easily and effectively generate forms and letters</p>	<ul style="list-style-type: none"> <li>• Conduct the technical integration of the LiveHelp product and document assembly in Montana.</li> <li>• Recruit and train staff to provide LiveHelp assistance for document assembly.</li> <li>• Develop the necessary content and tools to support LiveHelp website specialists and users.</li> </ul>	<ul style="list-style-type: none"> <li>• To what extent can the LiveHelp and document assembly products be effectively technically integrated?</li> <li>• To what extent does LiveHelp enable document assembly users to more easily and effectively assemble their documents?</li> <li>• How effective was the staff training?</li> <li>• How useful and effective are the content and tools for users and website specialists?</li> <li>• To what extent can other organizations readily adapt the LiveHelp model for document assembly assistance?</li> </ul>	<ul style="list-style-type: none"> <li>• Staff assessment of technical integration</li> <li>• Usage trends</li> <li>• Training assessments</li> <li>• LiveHelp post-chat visitor surveys</li> <li>• Semi-structured interviews/focus group of Website specialists</li> <li>• Administrative, anecdotal and other data provided by project partners, staff, and users regarding: <ul style="list-style-type: none"> <li>a. impact on client services</li> <li>b. staffing requirements</li> <li>c. staff development (e.g., training)</li> <li>d. identifying areas for website improvements</li> </ul> </li> </ul>

Project Objectives	Strategies/Activities to Achieve Objectives	Evaluation Questions	Evaluation Data
<p>3. Assess cross-jurisdictional delivery of LiveHelp assistance.</p>	<ul style="list-style-type: none"> <li>• Configure the LiveHelp system to support cross-jurisdictional activity.</li> <li>• Recruit and train staff to provide cross-jurisdictional assistance.</li> <li>• Develop the necessary content and tools to support navigators in providing cross-jurisdictional LiveHelp assistance.</li> <li>• Evaluate the test results and determine the replication potential.</li> </ul>	<ul style="list-style-type: none"> <li>• To what extent can the LiveHelp system be configured to effectively support cross-jurisdictional assistance? What factors significantly influence the effectiveness of this configuration?</li> <li>• How effective was the staff training?</li> <li>• What training and support is needed for staff to provide effective cross-jurisdictional assistance?</li> <li>• How useful and effective are the content and tools for website specialists that provide cross-jurisdictional assistance?</li> <li>• To what extent do website visitors find LiveHelp useful?</li> <li>• To what extent can cross-jurisdictional LiveHelp be effectively replicated in other contexts?</li> </ul>	<ul style="list-style-type: none"> <li>• Staff assessment of configuration</li> <li>• Training assessments</li> <li>• Usage trends</li> <li>• LiveHelp post-chat visitor surveys</li> <li>• Qualitative semi-structure interviews/focus group of Website specialists</li> <li>• Administrative, anecdotal and other data provided by project partners, staff, and users regarding program cost-effectiveness.</li> </ul>