

**Legal Services Corporation Technology Initiative Grants (TIG)  
Sample Letter of Intent for TIG Cycle**

Category: Replication

Amount Requested: \$ 83000

Are you also requesting funding for this project through LSC's Pro Bono Innovation Fund program? **No** Are you applying for a Pro Bono Innovation Fund that complements this grant? **No**

**Description of Project** - *Briefly describe the basic elements of the system(s), how they will be developed, how they will operate, the function they will serve within the legal services delivery system, their expected impact, and similar factors. (The impact should only be highlighted here; more details about the system's benefits should be provided below.)*

Legal Aid Organization (LAO), in conjunction with the Statewide Legal Help Program (SLHP) and on behalf of the state's legal services community, will develop a statewide online triage system to ensure that 100% of residents receive the most cost effective form of legal services that is reasonably likely to provide an outcome reflecting the facts and the law of the case. The triage system will utilize highly detailed expert systems logic trees to guide litigants to the most appropriate and cost effective resource likely to help them resolve their legal problems. The system will also help users identify other problems that have not yet been identified as legal issues.

The triage system will be built in Drupal, be mobile friendly, work in on all major browsers and web platforms, and build upon Drupal-based triage systems created by MA, CT, ME, and other states. It will be fully integrated into StatewideLegalHelp.org and will interface with online intake systems already developed across the state.

The triage system will collect information from users which will identify whether they are eligible for assistance from legal services; what type of legal problem(s) they have; whether they are likely candidates for self-representation; whether they have some resources available for limited scope representation; or whether their problem is one that could be resolved through mediation. Then, users will be directed to one of several local options along the legal services continuum – supported self-help through the Statewide Legal Help website; additional in-person assistance from a Self-Help Center; advice or limited assistance from the regional hotline provider; advice, limited assistance or full representation from a Legal Services agency or law school clinic; a referral to a private attorney for limited scope representation; referral to private attorney for full representation; or referral to mediation in addition to or in lieu of litigation. Live chat assistance will be available to help people navigate the triage system.

Development of the logic underlying the triage system will be done working with partners from the state's LSC funded programs and some additional non-LSC funded legal services programs, including the regional hotline provider, which provides advice and intake services to about half of the counties in the state. This project would be sustained as part of the scope of services offered by SLHP.

**Major Benefits** - *Describe the specific ways in which the system(s) will increase or improve services to clients and/or enhance the effectiveness and efficiency of program operations. To the extent feasible, discuss both the qualitative and quantitative aspects of these benefits.*

This project will improve services to clients because every person who enters the triage system will be given legal information and referrals relevant to their legal problem, ensuring that everyone who enters the system will receive some form of assistance and direction. It will mean more access for more people by connecting them with the best level of assistance based on their skills, legal problem, and available resources. The triage system will also help alert users and legal services attorneys to additional legal problems that haven't yet been identified.

This triage system will also enhance the effectiveness and efficiency of program operations because it will enable legal services programs to focus their resources on those cases and clients which most desperately need them. By using an expert system to prescreen which cases and clients are eligible for services, then determine which clients and cases require the assistance of an attorney (i.e., are not suited for self-representation) and fall into legal services programs' priorities, State's legal services field programs will be able to direct scarce resources to those clients most in need of their expertise as lawyers. The existence of a triage system can also help legal services programs and SLHP work together to devise methods of limited scope representation that can be used in combination with the statewide website's self-help resources to maximize the number of clients who can receive advice and limited assistance.

Finally, as more and more programs move to online intake, a triage system helps control the number of people completing online applications which require time and attention from intake workers and attorneys. Having a statewide triage system in place now, as online intake is coming across the state, makes online intake easier and more appealing for programs to adopt.

**Estimated Costs** - *Start by stating the amount of funding you are seeking from the TIG program, and then give the estimated total project cost, summarizing the anticipated costs of the major components of the project. List anticipated contributions, both in-kind and monetary, of all partners involved in the project.*

We are asking LSC's TIG program for \$83,000; the estimated complete cost of this project is \$103,000.

LAO personnel and fringe: \$12,000. LAO's ED will oversee the project and act as the liaison to the statewide committee to review the logic, assist with outreach and help implement the evaluation plan. LAO financial staff will handle contracts and all financial aspects of the project. LAO will contribute at least \$10,000 of this staff time.

Contracts:

SLHP, \$40,000: SLHP will assist with coordination of technical aspects of the project, integration with the MLH website, plain language review, and management of the statewide committee of stakeholders developing the expert system logic. SLHP will contribute an estimated \$10,000 of staff time.

State's additional four LSC-funded legal services programs (State Provider 1, State Provider 2, State Provider 3, and State Provider 4) and four large non-LSC-funded programs (Program A, Program B, Program C, and Program D), \$24,000: \$3,000 per program to commit program resources to the statewide committee to develop and review the logic trees that make up the expert system, and to help implement and help publicize the triage portal.

Drupal Programmer, \$17,000: to build the system integrated into statewidelegalhelp.org, then test and refine until complete.

**Major Partners** - *Identify organizations that are expected to be important partners. Specify the role(s) each partner will play.*

Legal Aid Organization (LAO) will partner with the Statewide Legal Help Program as the final product will be embedded within and interact with the StatewideLegalHelp.org. LAO (with SLHP's assistance) will hire a Drupal programmer to build the system, based on what was built for other state triage projects, integrate it with the statewide website, and make modifications as needed and improvements as planned.

To develop and fine-tune the logic trees underlying the triage system, LAO will partner with State's main LSC-funded legal services programs (State Provider 1, State Provider 2, State Provider 3, and State Provider 4) and the four largest non-LSC-funded programs (Program A, Program B, Program C, and Program D) that provide direct client services. There are numerous other smaller legal services providers in State, including law school clinics, which will be included as exit points in the triage system but won't be involved as funded partners.

Finally, LAO hopes to partner with members of the brand new State Bar's 21st Future of Law Practice Task Force, which in its planning forum identified this type of statewide triage system as a goal. The Task Force has identified an "Affordability of Legal Services" committee which is likely to be invested in such a tool.

**Innovation/Replication** - *Identify how and why the proposed project is new and innovative. Identify how and why the proposed project can significantly benefit and/or be replicated by other legal services providers and/or the community at large.*

This proposed project follows closely in the footsteps of at least two other projects (covering four states) using Drupal to build a statewide triage system; many other states have done statewide triage and we will be building upon their experiences as well. We will replicate and adapt those models to find one that works for our state, and we hope to expand upon it to build additional functionalities that can be used by others with a Drupal-based triage system. The proposed modifications include creating an xml export feature so some elements of the triage are carried over into online intake systems – elements such as the user's county and the problem code that matches the user's legal issue. The second improvement we want to make is to give users the ability to drop into the triage system without starting at the beginning – i.e., if they are browsing information about personal protection orders on the statewide website and have already selected a county, they can enter the triage system at the point where those choices have already been made, shortening the triage process to enhance the likelihood they will stick with it until the end (they would have the opportunity to go back to the beginning if they found that they were in the wrong place). These are modifications that others with Drupal based triage systems have identified as improvements that they would like to implement in their projects.