

Help desk at court	112
Self-help printed materials (e.g. divorce kits)	113
Self-help materials posted on web site	114
Self-help materials posted on kiosks	115
Other Pro Se assistance	119
Referrals	
Referred to other provider of civil legal services to low-income people	121
Referred to private bar	122
Referred to provider of human or social services	123
Referred to other source of assistance	129
Outreach	
Informational notices published in print media	131
TV spots or PSAs	132
Radio spots or PSAs	133
Newsletters – external to program	134
Referral agreements with other agencies	135
“How to reach us” pages on web sites	136
Other Outreach	139
Indirect Services	
Legal education for lay service providers	141
Collaborative service delivery models	142
Other indirect services	149
Other Matters	
Mediation/alternative dispute resolution services	151
Other Matters, none of the above	159

This approach allows you to record the information needed to report to LSC with only minor modifications to your case management systems. These include:

Addition of a field to record the Matters Code, with a drop-down list of the codes.

Modification of _____ to select cases with “Matters Codes” from “closed cases”

Development of _____ to summarize the matters data by type of matter.
(Additional reports can be developed to tabulate the data in various ways for local use — e.g., cross-tabulations of “referral” categories by legal problem.)

Appropriate _____ to make the distinction between “Closed Cases” and “Completed Matters” clear to the intake staff or advocates who are

entering the data.

Properly train the staff to use both the Matters Code and the Legal Problem Code to record matters. Since matters must be reported both by totals for Models and for Case Type, both numbers are needed. This is why you may not simply add the Matters Codes to the Legal Problem Codes.

Add two new Legal Problem Codes to your current list. These two codes will be used with referrals. They are 97-Other Problems (non-legal) and 98-Criminal referrals

2. Data collection on “matters” handled in group settings

These types of matters include the following:

- **Legal education workshops and presentations**
- **Pro se clinics and workshops**
- **Legal education for lay service providers**

Three types of information are required:

- Numbers of people who directly receive the services;
- Narrative overview of the services provided; and
- Vignettes, or “good stories” that can be used to illustrate the results and benefits that are achieved as a result of these services.

Situation (1): Small numbers of events. If your program does not offer a large number of these kinds of events each year, this information can be collected very simply. The staff members responsible for these services can usually draft the narrative information readily from notes or memory. The numbers can be estimated by consulting the calendar and writing down all the community presentations made during the year along with an estimate of the number of people who attended.

Situation (2): Large numbers of events. You will need to have a tracking system in place if you have an ambitious community legal education or pro se assistance program. This system need not be complex or burdensome. For example, the person responsible for reporting can ask the people who make presentations or conduct workshops to provide brief reports, using a simple form provided for this purpose.

This report would capture the following information about each event:

Date of the event, title and name of the person completing the report;

Type of event (community legal education, pro se assistance, etc.)

Number of participants

Brief narrative (2-3 sentences) describing the event.

“Good story” — If the event had especially good results or had an especially compelling impact on participants, the presenter can include a brief vignette in her report.

These reports can be kept in a “reporting” file and used to tabulate the numbers of “matters” completed report at the time the matters report is due.

In many instances, procedures are already in place that can be tapped into for capturing the

3. Data collection on “matters” representing services provided to the low-income population as a whole

These kinds of matters include the following:

- a) Legal education brochures distributed in client waiting rooms or to local agencies
- b) Legal education materials or self-help materials (e.g., forms) posted on _____ or _____
- c) Legal education materials published in _____
- d) Legal education articles published in _____
- e) Video legal education materials, TV and radio spots and PSAs

Items a-c require measures and estimates of the total numbers of people directly receiving these services and narrative descriptions and “good story” vignettes illustrating the results and benefits of these services on the low-income community. Items d and e are not susceptible to good measurement of numbers reached and are treated differently, as discussed below.

a. Legal education brochures. We acknowledge that numbers regarding people who receive community legal education information from brochures will be somewhat uncertain. Still, it is useful to know whether the scale of this service is on the order of 500 people annually, 5,000 people, or 50,000 people. Without some numerical information it is difficult for a stakeholder to appreciate how significant this category is in the overall legal education effort of a program.

Measured versus estimated. In the Matters Service Report form, we ask for separate “Measured” and “Estimated” counts of people reached. Based on our review of the initial data submitted by grantees and follow-up conversations with LSP people, we are providing the following guidelines with respect to legal education brochures. “Measured” and “Estimated” should be broken out along the lines of

Following are some examples:

Measured:

- 1. Brochures that are distributed by the program in response to enquiries from the public.
- 2. Brochures that are picked up at one of the program’s offices by visitors to the office.
- 3. Brochures handed out at a community legal education meeting.

Estimated:

- 1. Brochures dropped off in bulk for distribution at the local Bar Association, Law School Clinics or other community service organizations, in the event no one there counts them and/or returns the extras.
- 2. Brochures left on tables at community legal education events and not collected afterward or counted.

Program personnel should use their own discretion when counting brochures as “measured” or “estimated,” using the above examples as guidelines. The principal distinction is the degree of control one has in ensuring that the brochure actually got into the hands of an interested citizen. In those cases it can be counted as “Measured.” Less certain conveyances can be counted in “Estimated.”

Retroactive adjustment of "measured" versus "estimated" data for 2002 services.

that you retroactively adjust your “measured” and “estimated” brochure counts for the year 2002 using the above described guidelines. If the method used for counting will not allow you to do so, please begin counting with the new system as soon as possible, and include a note in your narrative report as to when the change in counting method took effect.

b. Legal education materials or self-help materials posted on web sites or web kiosks. This is another topic for which order-of-magnitude estimates are useful but expectations of precision kept modest—“Page views” is a useful measure available to your web master from software mounted on your program’s web server or Internet hosting service. Scores of statistics are available from these services, but the one that currently seems to make the most sense is the number of “page views” on pages containing the types of information defined as “matters” -- community legal education materials, pro se assistance materials or outreach (“how to reach us”) information.

The focus on "page views" rather than "page hits" is a change from 2001. After getting input from LS web masters across the country, we have decided that only page should be reported, not hits, for the following reason. One page may contain many elements, such as graphics and audio clips. Hits would report each of these elements as a separate number. If we give a client a brochure, we would not count how many pictures it contained, and we want to report web activity in the same manner. So we want this activity to be reported by pages viewed, this being the actual page being requested by the viewer, not its individual elements.

If the reporting software you have for your web site is not able to report activity in this manner, you should NOT report any numbers for web site activities, but be sure to point out that you do have a web site in the narrative portions of the matters report.

Retroactive adjustment of web activity to reflect page "views," not "hits." It is requested that you retroactively adjust your web activity counts for the year 2002 using the page “views,” not “hits.” It was not our intention to change the rules in the middle of the period. However, our research indicated that most programs were already reporting page views, not hits. Further, our research indicated that most reporting software stores this information for at least twelve months, which means that if page numbers are available to you, they are available to you for all of calendar year 2002.

Deciding whether to report web-related matters as "Community Legal Education" versus reporting them as "Pro Se Assistance." That decision is up to the discretion of the program. For some kinds of matters this is easy, such as forms that web users can fill in to file with the court (“pro se assistance matters”). For other materials, the distinction is not always clear. A

page explaining a tenant's rights might be requested by the viewer for general information before signing a lease ("community legal education") or used for preparation for a pro se defense of an eviction ("pro se assistance"). You will not know for what purpose users are viewing the materials. In designating which it is, all you can do is to use your best judgment based on the content of the page.

Statistical tabulations of page views can be compiled and printed out monthly or quarterly. These can be tabulated by the webmaster to cover a year's time when the annual "matters" report is due.

c. Legal education materials published in newsletters. As with brochures, order-of-magnitude estimates of the numbers of newsletter articles and similar legal education materials will provide useful indications of the scale of this service to the low income community.

e. Video legal education materials, TV and radio spots and PSAs. As with newspaper articles, outreach-oriented materials broadcast on TV and radio should be considered as

. Community Legal Education articles and spots should be counted under CLE. Please count each time a video or radio spot airs as one matter. In 2001, some programs tried to estimate the audience and counted the aggregate as Matters. The data was deemed too unreliable to be meaningful. Report the actual count of each airing for 2002. Counting each airing as one Matter will give an accurate count for video and radio spots. All of these media efforts for Community Legal Education are to be reported in the **NEW FORM 1C**.

For further information or technical assistance

Should you have any questions about the reporting of web site activity, or any other questions on matters reporting, please send your inquiries to resultsproject@lsc.gov.

**Table 1:
Checklist of Preparation Steps for “Matters” Data Collection**

	Goals	Detailed Steps
1. Initial preparations	Map out the preparations needed and who should be involved	<ul style="list-style-type: none">• Review the Matters Service Report instruments.• Flag the matters that are relevant to your program.• Identify the staff person(s) who potentially could track and/or provide this information.• Give briefing to other staff explaining the purpose of matters reporting and the implications of data collection for the Matters Service Report.
2. Design and plan	Create an approach for collecting / tracking data for	