

One program's journey from 'busyness' to greater effectiveness

In 2013, the Referral Service at Justice Connect began a fresh chapter in its evolution. A new organisational Strategy, integration between PILCH NSW and PILCH Vic and rebranding of PILCH, there was a structural change to the management of the Referral Service. The service was now managed by one manager and reported to the director, Referral Service across two states.

As a first step in bringing the new team together and setting priorities for going forward, the team workshoped and updated their Theory of Change, reviewed their monitoring and evaluation plan and committed to improving data collection and integrity. The agreed long term outcome was to improve access to justice through pro bono for people experiencing disadvantage. The way this was to be achieved was to operate an enquiry line staffed by volunteer Practical Legal Training students who took requests for assistance, triaged them with a service lawyer and notified the caller of the outcome of the triage. Service lawyers were responsible for making the referrals to pro bono lawyers.

At the end of FY14 the service director undertook an evaluation of the Referral Service. There were two main issues to better understand - the effectiveness and sustainability of the service. Funding cuts had led to reduced capacity with the loss of one lawyer in Victoria and limited funding in NSW leading to an overall reduction of 2EFT in the service. Yet the service took and assessed 2000 requests for assistance across 2 states and made 424 referrals for pro bono assistance.

However, the team was expressing fatigue with intake and assessment and with an overall conversion rate of 25% questioned its effectiveness. With most of the energy of the team going into taking and assessing requests for assistance only to have to refer 75% to other services, clearly something needed to change. But how would the team know what to change?

The evaluation focused on:

1. The source of enquiries. How did people find us?
2. The conversion rate in areas of unmet legal need. How effective were those pathways in leading to a pro bono referral?
3. What difference did we make? Client feedback, stories and feedback from participating lawyers to demonstrate impact?

The results of the evaluation showed that most people found the service on their own (likely to be via our website) or via a lawyer in the sector. The legal issues for which they sought assistance largely involved areas of law such as Family and Crime. Importantly, the least effective way for individuals with Family and Criminal matters to seek assistance was directly and where they did not have the assistance of a community lawyer.

Using this data and the experience of the staff taking these enquiries, the team took the decision to divert individuals seeking assistance with Family or Criminal law matters to VLA. The strategy involved the introduction

of a phone menu that advised individuals calling that the service could not assist with these areas of law and directed them to VLA. In addition, the service updated information on the website and implemented a strategy to raise the profile of the service amongst community legal centres.

Capturing and sharing client stories helped demonstrate the difference the service was making. Feedback from clients, pro bono lawyers and community lawyers provided rich insights into the impact of the work.

Commitment to evidence based decision making

There began the service's evidence based decision making journey. In 2015, applying the learnings from this evaluation, the service implemented the strategy to divert calls from individuals in particular areas of law and commenced engaging directly with community legal centres.

In addition the service improved its monitoring and evaluation plan to incorporate the learnings from the evaluation and began work on the new strategy monitoring and evaluating its progress quarterly.

What was also becoming apparent was that the service could become more effective by becoming more efficient. The two were very much connected.

In 2015 the team engaged consultants to help map its processes from intake to referral and apply the [Lean methodology](#) to identify inefficiencies (waste) in the process and to brainstorm improvements. What processes added value and what created inefficiency? Supported by the consultants to identify and develop projects, set targets and measures the team was supported to make decisions based on project findings. This ensured not only that projects stayed on course, but that the capacity of the team to do this work and become more effective was greatly improved.

Subsequent projects were developed and undertaken by team members supported by the manager and director. This approach was critical to the success of the projects and team commitment to learning and improvement. Team members selected the projects, were responsible for the activities and data, and articulating the learnings.

Evidence based incremental change over 2 years sees transformation in service strategy and impact

The strategy of diverting callers with matters in certain areas of law had some positive effects on capacity, however, individuals continued to call. Requests from community legal centres that could be referred, was yielding good results. Having identified that the least effective pathway to the service was for individuals to cold call the service, in 2016 the team decided to test the theory that if they ceased to take calls from individuals altogether they would not only improve the request to referral ratio (yield) but would be able to connect more people with pro bono lawyers.

To test the theory the team created a Lean project. The service ceased to take calls from individuals on Tuesdays and Thursdays and contacted community legal centres and VLA to encourage more direct approaches. Projects were created with specialist CLCs that saw greater numbers of individuals being assisted in areas of significant unmet legal need eg employment law, Stage 2 Access and Legacy Caseload.

In 2016 after 7 months of testing the effectiveness of this strategy, here is what the team found:

Yield

The pre-project 12-month average yield was **24%**. The project target for yield was 30%.

Between 28 April and November 2016 the service took **1034 enquires**. The average monthly yield over the project period was **45%**. Seven out of the eight months following the project's commencement saw yield exceed the pre-project average.

Pro bono referrals

The service averaged **31 referrals** a month in a 27-month pre-project period. The project target for the number of referrals was 40 per month.

During the project period the service averaged **46 referrals a month**. Seven out of eight months from the project's commencement saw referrals exceed the pre-project average.

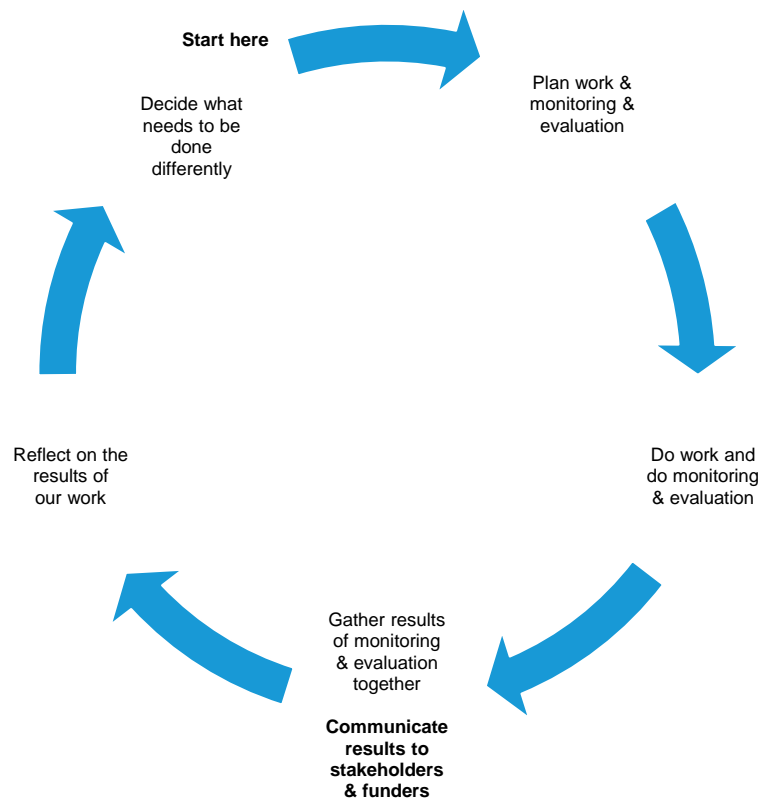
At the end of FY17 the Referral Service improved its yield by 40% and increased referrals by 19%.

Public Interest Law

Committed to reaching more people in more efficient and effective ways and applying the evidence from the projects and evaluation, the team took the decision to cease taking calls from individuals altogether. Scheduled to take effect from 14 August 2017 the service is busy laying the foundations for the next chapter in its 25 year history.

The service has also adopted a new name, Public Interest Law. This reflects the new strategy of seeking to partner and reach out to organisations in developing dedicated pathways for individuals to access free legal help. With added capacity due to not taking and accessing hundreds of requests for assistance from individuals who could not be assisted, team members are freed up to build new pathways.

The cycle of learning and improving continues:



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