



Supporting the development, trial and evaluation of a demand management framework for the community legal sector

Project report

November 2021

Clarity Consortium acknowledges and pays respect to the past, present and future Traditional Custodians and Elders of this nation.

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1. About this report

This report provides an account of the method, process, findings and early outcomes of a project to support four community legal centres to better manage demand for their services, with five additional community legal centres participating in the project and providing insight along the way. The project used an action learning methodology and this report includes the lessons learned along the way and suggestions to inform future work.

2. About this project

Community Legal Centres Queensland (CLCQ) was funded by the Department of Justice and Attorney-General to lead the development of a demand management framework to support Queensland community legal centres ('centres') to implement and/or improve existing intake and triage systems. This work was funded in an environment in which demand for services exceeds capacity, and in which government funding requires centres to target their services to the most vulnerable and disadvantaged clients. This work was also linked to CLCQ's digital strategy for the sector. Therefore, implementation using digital tools and processes was identified as a potential feature of the project.

CLCQ began this work in late 2020 by commissioning Rachel Healy and Gretchen Young of Clarity Consortium (herein referred to as 'we' and 'us' as the authors of this report) to facilitate a workshop with interested centres to:

- begin to define the problem the project is seeking to address
- understand the sector's expectations of the project
- test initial thinking about demand management frameworks used in other settings and sectors
- agree on how the sector will be involved in next steps.

The parameters for discussion were that CLCQ would develop a practical approach that centres could implement flexibly and in a way that was relevant to the remit of their service and the needs of their local community. The framework would not override centres' obligations under the National Legal Assistance Partnership funding but in fact would assist centres to better demonstrate how they prioritise their services for vulnerable and disadvantaged clients and priority target groups.

At this initial stage, the sector was most attuned to the challenges of intake and triage, this being the point at which client demand is most visibly expressed and at which centres need to make decisions about 'who gets in the door'. However, the workshop prompted people to extend this thinking to the concept of demand management (refer to side bar), which considers who gets in the door—and then what happens next (the services they receive) and what it takes to do this (resources, workforce skills, service models and planning).

An important theme to emerge from the workshop was the need for the sector to work together to solve shared problems and improve the client journey. This informed the later stages of the project.

Triage vs Demand Management



Triage:

- Who gets in the door?
- Subset of demand management
- Used to guide initial 'sorting' of clients

Demand management:

- Who gets in + what happens next + what does it take?
- Broader than initial triage
- Can involve service and/or workforce redesign to make best use of resources

Who did what?

The 2020 workshop served as a starting point for us to work collaboratively with CLCQ to design an extended piece of work from March to November 2021 to develop, trial and evaluate a demand management framework for the sector. CLCQ's role involved leading the development of the framework and supporting tools, to be trialled by four centres, while our complementary role was to lead the monitoring, learning and evaluation elements of the project from development through to implementation and project closure.

Our contribution was designed with the aims of supporting trial sites to:

- gather baseline data to understand 'what's happening now' in relation to demand management
- identify problem(s) relating to demand management that they wanted to address (informed by the baseline data)
- develop a strategy to address the identified problem(s).

The trial sites then worked with CLCQ to identify the tools and resources needed to implement their demand management strategy, after which we worked with centres to develop monitoring and evaluation frameworks to equip centres to measure the impact of their demand management strategies.

Five buddy sites also participated on the basis they were willing to mentor the trial sites, test some elements of the framework and/or implement the framework following the initial trial (see Table 1). This report does not attempt to capture the range of activities undertaken by buddy sites, rather it focuses on work done by CLCQ and the four trial sites.

Table 1: Roles and responsibilities

Who was involved?	Roles and responsibilities
CLCQ	<ul style="list-style-type: none">• Administer resources• Develop demand management framework• Set up Teams chats• Design training and development tools as part of framework• Identify variables beyond project scope to pursue
Clarity Consortium	<ul style="list-style-type: none">• Support baseline and impact data collection• Document lessons learnt• Design and facilitate collaborative action learning processes
Trial sites: <ul style="list-style-type: none">• Aboriginal and Torres Strait Islander Women's Legal Service North Queensland• Gold Coast Community Legal Centre• HUB Community Legal• Pine Rivers Community Legal Centre	<ul style="list-style-type: none">• Provide in-kind resourcing• Collect data as agreed• Trial the framework• Seek resourcing if needed from CLCQ (by negotiation)
Buddy sites: <ul style="list-style-type: none">• Bayside Community Legal Service• Caxton Legal Centre• LawRight• Queensland Advocacy Inc.• TASC	<ul style="list-style-type: none">• Support problem solving for trial sites• Trial and test selected elements of the framework

How did we work together?

An important feature of our contribution to the project was the use of participatory action learning involving CLCQ, the trial sites and buddy sites. The intent of this method was to foster collaborative reflection and learning across the group and develop buy-in and champions for this work across the sector. Action learning is underpinned by sharing power between researchers and participants, which we assessed was important in respecting the autonomy of each centre to determine what strategies it wanted to trial, while supporting shared problem solving and learning.

Over the life of the project, we:

- Facilitated four half-day action learning group meetings with participation by CLCQ, trial sites and most buddy sites (two in March, one in June and a final meeting in October 2021)
- Facilitated a trial and buddy site 'catch up' meeting in between the third and fourth action learning group meetings
- Facilitated sessions with a data analysis consultant to orient trial sites (and interested buddy sites) to the data visualisation tool used in the project, PowerBI
- Met with trial sites over the course of the project, individually and as a group to: settle data points and collection methods for baseline data; explore the baseline data once collected; and establish monitoring and evaluation frameworks relating to the demand management changes centres decided to trial
- Coordinated a co-presentation at the June 2021 annual CLCQ conference with CLCQ and trial sites
- Coordinated a co-presentation at the November CLCQ Leadership Forum with CLCQ and trial sites.

A notable feature of the action learning group was that each trial site included at least two participants, one from the leadership level of the organisation and another from the administration arm of the organisation, as centres recognised that the expertise of both levels would be required to better manage demand.

The collaborative action learning approach also helped to deliver on our **four guiding principles:**



Maximising outcomes through collaboration



Achieving change through learning and improvement



Making use of existing evidence and project data

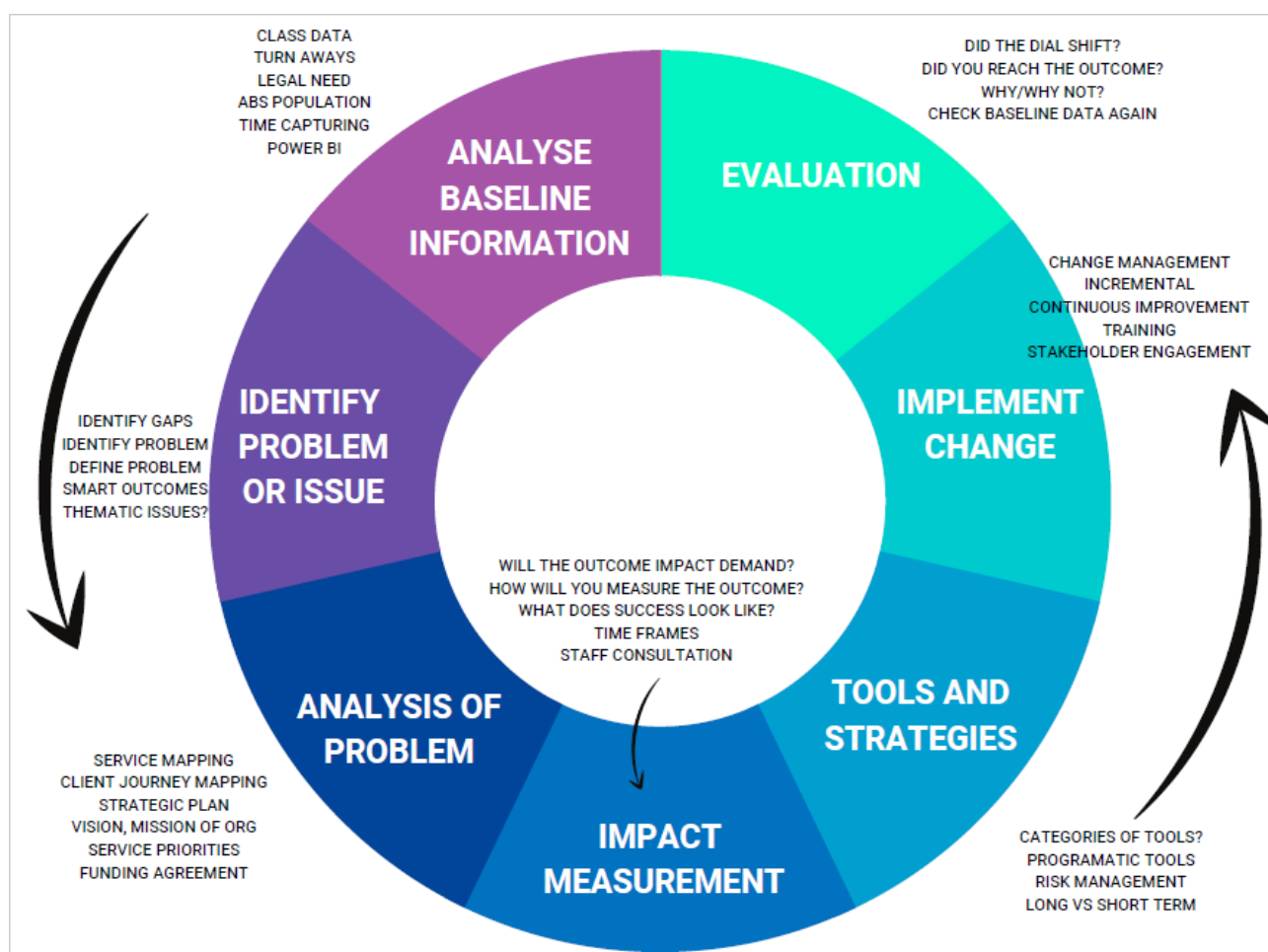


Investing in sustainable and replicable processes and outcomes

3. The CLCQ demand management framework

CLCQ's demand management framework (Figure 1, Demand Management Wheel) was modelled on an iterative, continuous improvement demand management model developed by Queensland Health allied health professionals.¹ This guided project implementation, beginning with baseline data collection. Over the life of this project, all stages of the Demand Management Wheel were implemented with the exception of Stages 6 and 7, implementation and evaluation. Each centre's demand management strategies were still being implemented at the time of project closure and impact evaluation was therefore premature. However, we worked with each trial site to develop evaluation frameworks and supporting data collection methods to enable evaluation to occur after an appropriate period of implementation and data collection in 2022.

Figure 1 – Demand Management Wheel (source: CLCQ)



Section 4 of this report provides an overview of project activities and outputs at each stage of the Demand Management Wheel, including a snapshot of changes occurring at each trial site, while Section 5 describes some of the changes catalysed by this project and Section 6 includes lessons learned and recommendations for future work in relation to demand management or sector collaboration.

¹ Queensland Health. (2005). *Managing demand on allied health community outpatient services*. Available from: <https://www.health.qld.gov.au/ahwac/html/demand-mgmt>

4. Overview of project activities and outputs

Demand Management Wheel Stage 1 - Analyse baseline data (What's happening now?)

Much effort and project resourcing was directed to this stage because there was no existing blueprint for gathering baseline data to inform demand management decisions in the community legal sector. Three of the four meetings of the action learning group were devoted to this stage of the project:

- the first meeting focused on orientating participating sites and exploration of what data might be useful to inform demand management decisions
- the second meeting focused on reaching consensus about what data all trial sites could feasibly commit to collecting and how centres might measure service intensity, an important metric when making demand management decisions (refer to Table 2, Baseline data that trial sites agreed would be useful to inform demand management) and
- the third meeting focused on exploring the baseline data collected by centres up to June 2021 and the first step of Stage 2, identify the problem.

Initially, we sought to work with CLCQ and their national counterparts, Community Legal Centres Australia (CLCA), to develop customised reports on CLASS (the Community Legal Assistance Services System, a database for community legal centres). Some customised reports were developed as part of the project and provide centres a valuable and quick way to run discrete reports.

However, part-way through this stage of the project we identified that Microsoft PowerBI might be a more useful, user-friendly way for centres to analyse their data. PowerBI is an affordable data visualisation tool readily accessible to all Microsoft users. PowerBI allows organisations to import existing data and analyse it by multiple variables at the same time. As an illustration, importing into PowerBI some of the standard data collected by a community legal centre allows the centre to easily visualise the proportion of new vs repeat clients and their corresponding income level, disability type, service type and the time spent on the legal services provided.

PowerBI proved to be a game changer for the project and for participating centres. It's important to acknowledge that this was only possible because CLCQ invested significant project resourcing and engaged specialist skills to support centres to have their baseline data imported into PowerBI. Further, none of this would have been possible without each of the trial sites directing significant internal resources to collecting the baseline data. With the benefit of hindsight, some centres wished they had sought CLCQ project funding to support setting up and/or collecting the baseline data, a lesson which we return to in Section 6 of this report. We supported centres through individual 'PowerBI exploration' sessions to build confidence in analysing and interpreting the data.

However, PowerBI is only as good as the data imported, and a revelation for trial sites was the need to improve data collection and fill gaps. Centres recognised that improving data quality and completeness would improve the contribution of PowerBI to understanding service activity and informing decisions.

Centres were particularly interested in the new insights gained in relation to whether their services are being targeted as effectively as they can be towards the most vulnerable and disadvantaged clients. One centre identified that applying different filtering options on PowerBI allowed them to model the impact of potential demand management changes. After the third action learning group meeting, one participant summed up a significant shift within the group:

“Centres started out wanting tools not data, but now centres are putting data + tools and strategy together”

Table 2: Baseline data that trial sites agreed would be useful to inform demand management

Data item	Purpose	Data sources	Available/used for project? Y/N
Unmet demand, including seasonal unmet demand	To understand the number of clients seeking assistance which centres were unable to assist, including variations across the year	<ul style="list-style-type: none"> Missed calls (total + from discrete phone numbers) Referrals due to being at capacity Client turnaways Waitlist 'drop offs' 	<p>N</p> <p>This item proved difficult to collect reliably across the trial sites e.g. not all centres' telco services gave them access to phone analytics</p>
Seasonal demand	To understand demand variations across the year and better equip centres for surge staffing in peak periods	<ul style="list-style-type: none"> Total incoming calls Total service numbers and problem types per fortnight Total incoming referrals per fortnight 	<p>N</p> <p>As above</p>
Client churn across the sector	To gather indicative data on the number of clients struggling to get help and/or sector 'superusers'	<ul style="list-style-type: none"> In lieu of a mechanism to track clients across the sector (e.g. a universal identifier), centres asked two new questions of clients and entered this information on CLASS, (how many legal centres did they approach previously and did they get advice from another centre about the matter) 	<p>Y</p> <p>However, at the time of writing, there were many gaps in this data and this is a work-around in the absence of a universal identifier – see Section 6 of report.</p>
Service intensity	To understand where centre resources are being directed	<ul style="list-style-type: none"> Time spent per client, per service, per problem type, per NLAP priority group, by client needing interpreter 	<p>Y</p> <p>Time logging initiated/expanded and continued by all trial sites</p>
Service intensity by new vs repeat client	To understand where centre resources are being directed	<ul style="list-style-type: none"> Time spent per new vs repeat client, per service, problem type, NLAP priority group 	<p>Y</p>
Gap analysis of local community legal need and current service provision	To understand the gap between legal need (as opposed to demand, or expressed need) and available service provision	<ul style="list-style-type: none"> CLASS data, service mapping and literature 	<p>N</p> <p>This is the subject of a national project.</p>
Client experience and immediate outcomes	To understand client experience and feedback	<ul style="list-style-type: none"> Annual community legal centre survey 	<p>Y</p>
Client outcomes (long term)	To understand service impact for diverse client cohorts	<ul style="list-style-type: none"> Not available – would require long term tracking of client outcomes – see Section 6 of report 	<p>N</p>

Demand Management Wheel Stage 2 – Identify problem & Stage 3 - Analysis of problem

Stages 2 and 3 were conducted individually by each trial site, informed by the data analysis made possible through PowerBI. Centres were able to analyse gaps in service delivery or identify client cohorts for whom they wished to provide more (or fewer) services. Trial sites reviewed the problem or problems alongside some or all of the following: service mapping, community consultation, strategic planning or processes to sharpen organisational vision and purpose statements. Outside of the resourcing for the demand management project, CLCQ supported one trial site with strategic planning activities, while one of the Clarity Consortium members supported another trial site with their strategic and operational planning.

CLCQ stimulated a problem identification process at the third action learning group by posing two hypothetical scenarios relating to demand management. Participants workshopped strategies to manage the problems and, in the process, reported increased confidence that together, the group could generate solutions to shared problems. Following PowerBI analysis and the problem-solving activity, participant reflections on what had been most effective during the session included:

“Centres know the answers – with support, centres can make the changes.”

“Helpful to apply a different lens rather than ad hoc/intuitive.”

“Same sort of information has sparked different conversations”

Demand Management Wheel Stage 4 - Impact Measurement & Stage 5 - Tools and Strategies

In reality, Stages 2 and 3 happened in tandem with Stages 4 and 5. As centres identified the demand management problem/s they wanted to address, CLCQ provided suggestions about potential tools and strategies that it could provide. At the same time, we worked with centres to sharpen each centre’s problem statement in ways that allowed us to formulate measurable objectives and explore potential sources of impact data and measures.

To some extent, Stages 2-5 need to be flexible and iterative, but we do note at the end of this report that a more structured process for these stages may be helpful to some centres, depending on the extent to which they have already engaged in strategic planning, service mapping, staff consultation, data analysis or have prior evaluation experience.

By the end of Stages 4 and 5, centres had settled on demand management changes they intended to trial, confirmed the tools and support required from CLCQ, and finalised with us the frameworks that would underpin monitoring and evaluation. A snapshot of each centre’s demand management changes is provided on page 12, with more detailed reports for each centre in Appendix 1.

Demand Management Wheel Stage 6 – Implement Change & Stage 7 - Evaluation

At the time of writing, centres were still in the process of rolling out identified demand management changes and working with CLCQ to customise the CLCQ tools to the centre’s specific operational context and needs. We note that feedback from all trial sites on the draft tools produced by CLCQ was resoundingly positive. The tools encompassed question flow charts and suggested scripting for front line workers, call

management techniques, a range of email templates, worker training, and links to relevant legal information and webinars. A full collection/list/description of the CLCQ tools is included in Appendix 2.

In terms of Stage 7, it would be premature to attempt any valid evaluation of the impact of changes which are still being implemented. Whilst we could not conduct an impact evaluation, we did use an evaluation technique in the final action learning group meeting, a modified version of the Most Significant Change methodology, which we report on in Section 5 of this report.

We also provided a facilitation guide to trial sites to support them in gathering qualitative baseline reflections from staff prior to implementing demand management changes. The guide also includes a method and questions for centres to use down the track to gather qualitative reflections from staff on the impact of the changes. The two centres that undertook a staff consultation process reported that the guide was helpful to follow and the process allowed them to gather valuable baseline reflections, with the additional benefit of serving as an effective change management strategy within the organisation.

Snapshot of changes being trialled

Below are very brief snapshots of the changes being trialled by each of the four trial sites. Appendix 1 contains a full overview of what each centre is doing.

Aboriginal and Torres Strait Islander Women's Legal Service North Queensland is supporting frontline staff to make more confident, timely and accurate client intake assessments and allocation of clients to the most appropriate lawyers to improve continuity of service delivery. They've gone paperless to improve efficiency and are using an innovative continuous learning tool whereby intake staff and lawyers assess and compare the accuracy of intakes over time.

Gold Coast Community Legal Centre is supporting frontline staff to make more confident, timely and accurate client intake assessments, reduce wait times for clients and prevent unnecessary repeat appointments or cancelled appointments due to inappropriate bookings. They aim to prioritise services for more vulnerable clients, equip clients to be better prepared for appointments and channel more capable clients to self-help resources.

HUB Community Legal is simplifying their intake process and supporting frontline staff and volunteers to make more confident, timely and accurate client intake assessments, reduce wait times for clients and prevent unnecessary repeat appointments. They've introduced new booking, triage and data collection systems, trained staff in the new systems and processes and are trialling a new triage lawyer role.

Pine Rivers Community Legal Centre is trialling new tools to equip frontline staff to make more confident, timely and accurate intake assessments and prevent unnecessary repeat appointments or cancelled appointments due to incorrect intake assessment. They're also working developmentally with leaders of local culturally and linguistically diverse communities to understand how they can improve the centre's accessibility and responsiveness.

5. Changes catalysed by the project

At the fourth and final action learning group meeting, we ran a modified Most Significant Change evaluation process. This method is well suited to participatory action learning and provides insights about what people value, as well as the impact of the work. The group then reflected on the overall lessons learned based on the trial, and implications for replicating this work in other centres.

Participants shared their stories of change in trios then formulated a short, 'take home message' resulting from the story. These are presented on a single page in Figure 3 on page 16. The stories of change that emerged within the group were diverse, but we've grouped them into four broad themes. Note that we cannot yet report on the impact of the demand management changes each centre is implementing, rather this section describes the changes that have been catalysed by the project for centres and CLCQ.

1. Good data is powerful

One trial site reflected that the baseline data in PowerBI had allowed them to conduct scenario testing, with some surprising results. There were some changes the centre thought would reduce demand, but when tested using PowerBI filters, this wasn't the case (e.g. filtering by income was found to be unlikely to have a huge impact on reducing demand as it would only filter out a small number of clients).

Another trial site noted that the data focused their centre on gaps in the demographics of clients accessing their service, prompted efforts to better service a particular client group and made them more aware of the importance of capturing accurate data. Another site noted that the project had shifted organisational culture to be more focused on data and the client journey. This in turn had resulted in a shift in focus to serving the most vulnerable clients and channelling more capable clients towards self-help options.

The ability to analyse data by multiple filters has enabled each trial site to monitor the impact of demand management changes that would not have been possible before this project started. For example, sites can gain an in depth understanding of where resources are going, and for whom, by analysing multiple variables such as time spent, repeat vs new appointment, service type, legal matter and client characteristics. This in turn has focused all centres more clearly on whether resources are being prioritised for the most vulnerable and disadvantaged clients. All sites reported a higher motivation to collect accurate data, as it was seen to serve the centre's strategy and direction in addition to being collected for compliance or accountability purposes.

"We've all had access to the data but haven't been able to interpret and use it. It is now more accessible and user friendly."

"Seeing gaps in demographics prompted the change."

"Data is most useful when it is complete and allows for strategic planning and service delivery."

2. Be clear about the problem and purpose

Participants all agreed it had been important to get clear about the problem they were trying to address and then pursue purposeful changes. One centre noted it had been making reactive changes, sometimes with unintended consequences that exacerbated the very problem they were trying to fix. Being able to

scenario test changes using the PowerBI data and get clear about the problem and purpose had equipped them better to pursue meaningful demand management changes.

All centres were clearly focused on delivering services to priority groups or, in the case of Aboriginal and Torres Strait Islander Women's Legal Service North Queensland, a specialist service already serving a priority group, on prioritising services to their clients based on more accurate assessments of need, risk and urgency. One participant noted that the strategic conversations generated by the project, and the focus on purpose and impact, would serve the sector well as funders move towards impact funding frameworks. Another participant observed that the project had created space to get clarity around problems and explore what centres needed in a safe way. Yet another noted the value of getting clear about what their centre was doing, why and for whom.

"Get clear on the problem."

"Reactive changes are not good changes."

"Focus on what we are doing and why we are doing it and who with."

"We're clearer on who we are prioritising."

"Focus beyond intake and think more systematically about managing demand and priority groups – stop trying to answer every call."

"Demand management is ultimately a story of impact."

3. Bring people with you

The importance of involving staff across the organisation was a strong theme in the take home messages from centres. Participants reflected that staff discussions were important to make everyone aware of why changes were being made, and to create a safe space for all staff to have input. People also agreed that one of the strengths of the action learning group had been equal participation and power-sharing between the leadership and administration levels in each trial site, as both perspectives were needed to interpret the problem accurately and formulate feasible solutions.

All sites noted that they were making better use of workforce skills by empowering intake staff to make more confident and accurate assessments, with the aim of freeing up solicitor time to deliver services to better prepared and more appropriately assessed clients. One site is explicitly trialling a new workforce role of triage lawyer alongside upskilling intake staff. This site also noted that staff wellbeing is intrinsic to better demand management and decision making. Another site seized on the opportunity presented by recruiting a new administration officer to trial the new tools and processes with fresh eyes and provide feedback before the tools are rolled out more widely.

"Changes that improve staff wellbeing can improve decision making around managing demand."

"Bring everyone to the table to be part of the solution."

“Listen to feedback from staff. Need to be flexible to cater to staff needs.”

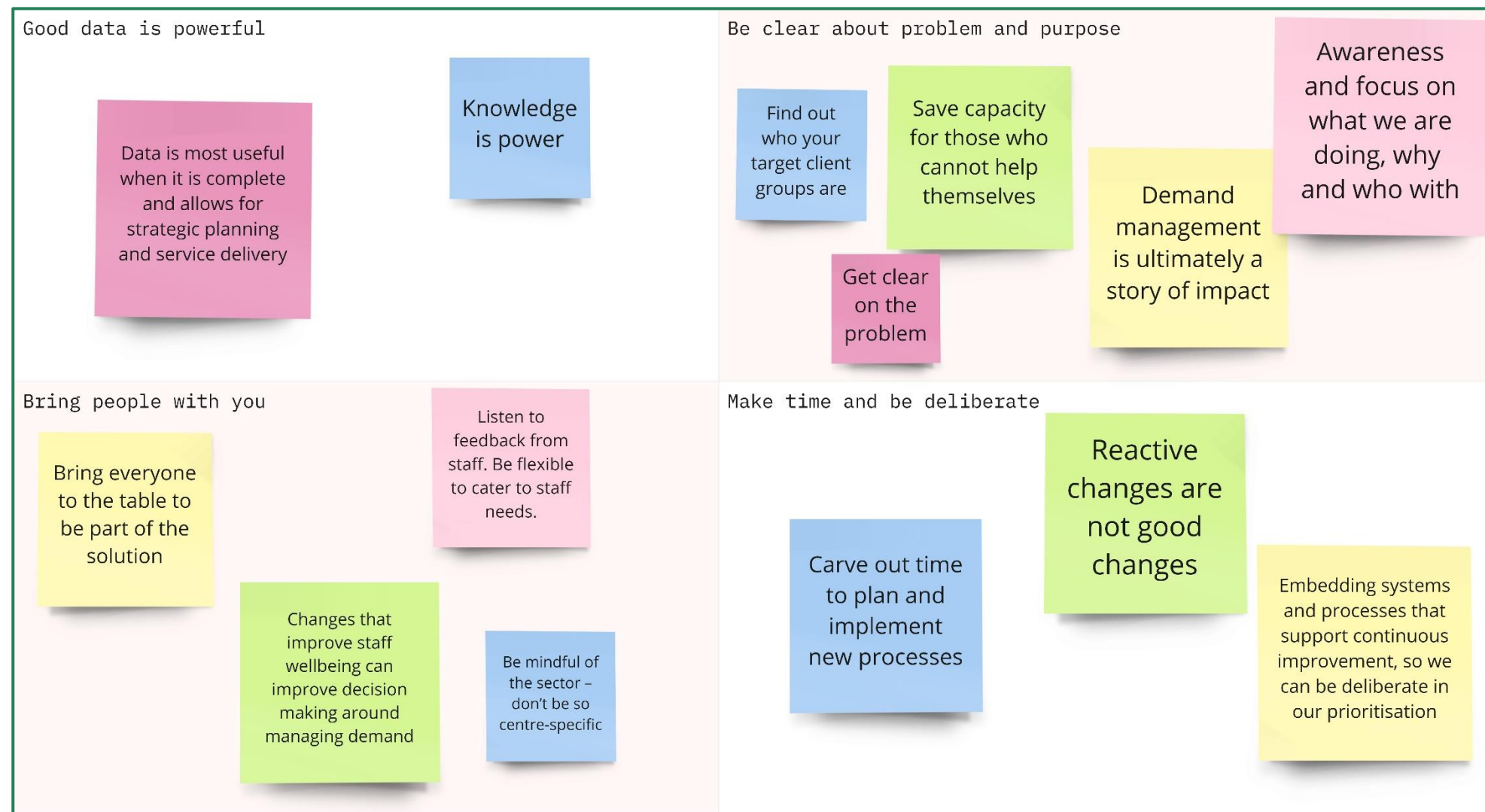
4. Make time and be deliberate

A strong take home message from the group was the value of stepping outside busy core business to have facilitated conversations and engage in shared problem-solving and reflection. This was a strong theme in the group’s recommendations for other centres wishing to pursue demand management changes, reported in Section 6.

“Carve out time to plan and implement new processes.”

“Embed systems and processes that support continuous improvement, so we can be deliberate in our prioritisation.”

Figure 3: Take home messages from participants' Stories of Most Significant Change



6. Suggestions for future work

Drawing on lessons learned, this section presents suggestions for future work, structured around the following themes:

1. The pivotal role of CLCQ in leading further demand management work
2. The validation of action learning as an engagement method for future sector projects
3. Suggested refinements to the Demand Management Framework
4. A suggested approach to a potential Phase 2 implementation of the framework
5. Sector feedback from the November 2021 CLCQ Leadership Forum
6. Suggestions for complementary work beyond the scope of the framework or Phase 2 trials
7. Suggested messages/advice for centres which may be interested in this work
8. Suggested messages for funders receiving a briefing on this work.

In this section of the report, we make seven recommendations for consideration by CLCQ in taking this work forward.

Recommendation 1: Where feasible, adopt action learning methods for future work with the sector – both in demand management or for other work which is exploratory and iterative.

Recommendation 2: Explore opportunities to resource a Phase 2 trial of the Demand Management Framework in line with our suggested approach and refinements detailed below, and led by CLCQ, including the addition of an initial orientation stage and creation of simple, user-friendly checklists and tools to support each stage of the process (in addition to those already generated by this project in Phase 1)

Recommendation 3: Develop a menu of potential resourcing or supports to assist centres to identify opportunities where additional support may add value. This could include capacity building related to skills identified by participating centres, ideally embedded into the project and taking a capacity building approach.

Recommendation 4: Extend the timeframe for Phase 2 to at least 12 months, ideally with a flexible end date to accommodate centres' capacity to implement change.

Recommendation 5: Consider resourcing follow up evaluation / evaluation support for the four Phase 1 trial sites to complete the cycle of learning from Phase 1 and to inform Phase 2.

Recommendation 6: Explore the feasibility of, appetite for, and options to develop, a universal client identifier to allow a better understanding of sector-wide demand and client churn and development of strategic responses to this issue.

Recommendation 7: Explore options to engage in long term client impact evaluation to begin to build better data about which interventions work best and for whom (and possibly, why). This would support evidence-informed demand management changes and position the sector for a shift to impact funding.

6.1 The pivotal role of CLCQ

Below are direct quotes from the Phase 1 action learning group about suggestions for how CLCQ could approach future work, either in relation to demand management or with centres more generally. The group gave a firm endorsement of the need for CLCQ to remain involved in future work, as people felt that CLCQ lent credibility and enabled trust in the process. The ongoing practical support and problem solving provided by CLCQ across the life of the project was also highly valued.

“Continue to provide resources, not answers”

“Without CLCQ running it alongside CLASS and CLCA and PowerBI, it might not have worked”

“CLCQ needs to be involved”

“Do more sector wide projects on demand management or generally. Ensure CLCs are aware of additional supports and resources available during the project.”

“Inter-CLC meetings/forums re demand management (right mix of people)”

“Ongoing creation and implementation of demand management tools”

“Create opportunities for greater collaboration and sharing between CLCs”

6.2 Continue action learning as a methodology for sector projects

An explicit discussion held within the action learning group was whether the action learning methodology should be replicated by CLCQ for future projects. The group recommended that this method would be valuable to use again as the approach supported sharing of knowledge and power as well as collaborative problem-solving. The approach also gave centres autonomy in what they focused on while creating dedicated time for facilitated conversations, deliberation and structured processes.

Recommendation 1: Where feasible, CLCQ adopt action learning methods for future work with the sector – both in demand management or for other work which is exploratory and iterative.

What does this mean for next steps?

Building on the above two conclusions, we suggest that further demand management work would ideally be taken forward with CLCQ once again leading the work and using an action learning methodology with participating sites. We have conceptualised this as a Phase 2 trial and sketched out a proposed process and approach for consideration. Our suggestions draw on the lessons learned and tools and resources developed in Phase 1 and seeks to engage Phase 1 trial sites as mentors and champions.

Before we present our suggested approach to Phase 2, we outline some suggested minor amendments to the Demand Management Framework itself.

6.3 Suggested refinements to the CLCQ Demand Management Framework

The following suggestions are made with the explicit acknowledgement that none of the trial sites has completed all the steps in the Demand Management Framework, and therefore the model is not yet fully tested or evaluated. However, the positive reports of change from participating sites suggest that the process to date has been valuable. It has supported centres to make more deliberative, data-informed demand management changes than would have been possible without the scaffolding of the Demand Management Framework, the support and resourcing from CLCQ, and the action learning process. Based on participant reports, the project also appears to have generated a cultural shift towards more purposeful use of data, greater focus on impact and more explicit targeting of priority client groups.

We think the Framework is a conceptually sound model for centres to follow and recommend only three minor changes:

- First, we suggest that Stages 4, Impact Measurement and 5, Tools and Strategies occur in parallel. This would allow evaluation data collection methods to be integrated as far as possible into tools and strategies. These stages occurred in parallel during the project and we note this is good practice in evaluation design.
- Second, we suggest that Stage 6, Implement Change be described as Implement and Monitor Change, to emphasise the importance of centres engaging in ongoing monitoring and review in addition to final evaluation.
- Third, we suggest that staff consultation be added to the suggested activities in Stages 1, 6 and 7, picking up on the reflections from trial sites about the importance of actively engaging staff through the change process.

Finally, we note that more often than not the process is likely to be emergent and iterative, and may not follow the exact linear sequence suggested in the Demand Management Framework. It's possible that one stage may inform the next while also suggesting a need to revisit a previous stage. For example, problem analysis may highlight gaps that warrant further data analysis, or implementation and monitoring may identify a need to refine tools and strategies. While the process may not always rigidly follow the sequence in the wheel, it is a helpful guide and represents a best practice sequence of steps.

6.4 Suggestions for a Phase 2 trial of the framework

Based on the lessons and findings from this project, we recommend that CLCQ leads a facilitated and supported second stage trial of the framework. Subject to an evaluation of the full Phase 2 trial, it should then be feasible to finalise the framework and implementation model.

Reflecting on the accomplishments of the project, our reflections and those of participants, we suggest that the following approach could be a helpful basis for a Phase 2 action learning approach.

- **Orientation and set up** – before centres commence Stage 1, Analyse Baseline Information, we recommend some foundation work:
 - provide an orientation to the process for the Phase 2 trial sites;
 - involve Phase 1 trial sites as mentors and champions;
 - recruit buddy sites to further extend sector engagement;
 - brief Phase 2 trial sites of what will be required from them and a menu of available CLCQ support to assist with this work (this picks up on feedback from centres that they wished they had sought resourcing from CLCQ given the workload involved in the project, but hadn't really known what to ask for. Centres reported that a menu of

resourcing options might have assisted them to make better use of available resources); and

- provide a roadmap and indicative timelines of the steps that lie ahead, including suggested points where Phase 2 trial sites might schedule internal team meetings for discussion and reflection or plan parallel work such as strategic planning.

The other foundation work is, of course, collection of baseline data. The baseline data set is now established, and we don't consider that it needs review unless new research becomes available or the information systems used by centres undergo major redesign. Centres wishing to participate in future trials could be offered a group meeting as orientation to the project, perhaps including a Power BI 'show and tell' from the four trial sites from Phase 1 and an overview of what the Phase 1 trial sites have done and achieved.

Centres could then be supported to collect baseline data for a 3 month period and have this uploaded to PowerBI. Much of the baseline data is already being collected by centres, but the 3 month period would allow centres an opportunity to address gaps in existing data collection and to collect additional data around time spent, indicators of client 'churn' across the system and measures of demand, including unmet demand such as turnaways, referrals due to centres be at capacity or phone analytics about missed calls.

- **Stage 1. Analyse baseline data** - at this point, centres could be offered individual 'Power BI tours' to build their confidence in exploring the data and then given some time to interpret it within their teams. We provided a baseline data analysis resource to centres to support this work, which could be refreshed and included in the CLCQ toolkit for future iterations of the project. We suggest Stage 1 could conclude with a first action learning group session for centres to come together and analyse their data and begin Stage 2. We also suggest that centres should engage in initial staff consultation at this stage, if they haven't already, as part of good change management and leadership.
- **Stage 2. Identify problem or issue** – we suggest that centres be given some time to work through this stage, perhaps with a simple resource kit including prompt questions to guide problem identification and building upon the problem identification scenarios already developed by CLCQ. This stage could be done 'in-house' by centres.
- **Stage 3. Analysis of problem** – we're not certain that centres worked through this stage systematically during the Phase 1 trial, although we note at least two centres undertook strategic planning in parallel with the project. A simple resource kit with prompt questions and a suggested process might assist centres to get the best value from analysing the problem alongside service mapping, strategic planning, setting service priorities and reviewing funding agreements etc.

We suggest that a second action learning session at the mid-point of the time allowed for Stage 3 may be helpful, as centres could share their analysis and processes to date and still have time to replicate helpful ideas generated at the session by their peers.

- **Stage 4. Impact measurement and Stage 5, tools and strategies** – best practice in evaluation involves evaluators working with clients at the design stage of a program or service, so that evaluation questions and data collection methods can be integrated into implementation from the outset. As with the approach used between CLCQ and ourselves in Phase 1, we suggest that evaluation frameworks be developed in parallel with selection of potential tools and strategies as this will make best use of both stages of the process.

We suggest that a third action learning group session would be helpful during these stages also. This would allow centres to compare approaches and participate in group problem-solving and adopt any helpful ideas that emerge during group discussion.

- **Stage 6. Implement and monitor change** – this stage would be managed by centres but we suggest a methodical implementation process is more likely with the provision of an implementation checklist. This could include prompts to conduct baseline staff consultation before the changes begin (our consultation guide could be a helpful resource), and prompts around suggested frequency of monitoring, headline data to review during implementation, and scheduling regular team meetings to track changes, identify emerging issues and make changes as needed.

We note that Phase 1 trial sites emphasised the importance of good change management and leadership in guiding demand management strategies. This would be a stage of the process where these skills would be particularly important.

- **Stage 7. Evaluation** – this could be done in a number of ways but we suggest that a capacity building approach could add value. This could involve evaluators working alongside centres to evaluate the impact of changes and build the centre's in-house evaluation skills and confidence at the same time. This could include sense-making processes to interpret evaluation findings and inform the next iteration of demand management changes, thereby 'closing the loop' on the Demand Management Wheel.

Ideally the evaluators will have been involved in setting up the impact measurement systems in Stage 4 to embed as much evaluation data collection as possible into the implementation process itself. Alternatively, centres could be tasked with self-evaluating the changes but supported by a toolkit for this work. Our staff consultation guide could form one component of this as it includes a facilitation guide for a second evaluative staff consultation process, in addition to the facilitation guide for baseline staff consultation.

- **Embedded capacity building** - At various stages during the project, centres noted specific skills they felt they needed support with. A couple of centres acknowledged the need for guidance on change management and leadership skills to facilitate the demand management changes. Other centres expressed a lack of confidence in analysing data. In Phase 2, it's possible that participating centres may value skills development in some of these areas, suggesting a further area for CLCQ support. This could entail a capacity building approach where skills development is embedded into project processes to support people in 'learning by doing.' For example, centres could be offered coaching as they work through a stage of the framework, or action learning group meetings could be extended to host a specialist to provide applied guidance at a relevant point in the project.

Recommendation 2: Explore opportunities to resource a Phase 2 trial of the Demand Management Framework in line with our suggested approach and refinements, and led by CLCQ, including the addition of an initial orientation stage and creation of simple, user-friendly checklists and toolkits to support each stage of the process (in addition to those already generated by this project in Phase 1)

Recommendation 3: Develop a menu of potential resourcing or supports to assist centres to identify opportunities where additional support may add value. This could include capacity building related to specific skills identified by participating centres, ideally embedded into the project and taking a capacity building approach.

6.5 Sector feedback about this work

On 18 November, we co-presented with CLCQ and the four trial sites at the CLCQ Leadership Forum. The session allowed sector leaders to understand more about the project and hear directly from their peers in the trial sites. Once decisions are made about any future iterations of the project, further communication with the sector would be valuable, as a buddy site which was represented at the Leadership Forum fed back that there was some confusion at the Forum about what the project might mean for other centres and the wider sector.

At the end of the session, we administered an anonymous poll on behalf of CLCQ to gauge audience views about, and interest in, this work. The poll posed three questions to the group with key findings reported below.

1. What's one thing you would change tomorrow if you could, to help your centre better manage demand?

While some responses to this question would require additional resourcing, the majority could be achieved with modest additional resourcing, training or within the context of future demand management work. Of 23 responses:

- eight related to better assessment of client needs, vulnerability and service eligibility, including training to support intake staff to do this effectively
- seven related to having more user-friendly IT systems or making better use of technology including CLASS, electronic case files or internet phone systems
- six related to additional staff (e.g. more administration staff, paralegals, volunteers, or a dedicated intake team)
- two more specific ideas could be pursued as part of demand management strategies: holding triage meetings or creating an alert for administration officers to know whether clients need to do something before their next appointment.

2. If there was no limit on resources and you could change anything in relation to how you manage demand now, what would it be?

Of 25 responses, more than half related to more staffing, ranging from more lawyers through to more administration, intake or paralegal staff. The remaining responses were more nuanced and again related to some of the demand strategies pursued through this project including different use of the workforce (e.g. having a dedicated triage or intake lawyer or paralegal), staff training, different service models, better systems and better referral pathways.

3. As leaders, what support/training would you provide to first contact staff to support their contribution to demand management?

A total of 21 people answered this question and answers may be helpful for CLCQ to consider future training opportunities:

- the majority of responses (15 out of 21) related to increasing knowledge of first contact staff in relation to service areas, legal problems, legal issues and processes, or referral options. Five of the 15 responses included suggestions for specific supporting tools such as guidelines, referral databases or a package of training materials for frontline staff to reduce the time individual centres spend training new staff
- four nominated trauma informed practice/understanding of trauma
- four nominated dealing with difficult or emotionally charged clients/de-escalating client behaviour

- other responses included vicarious trauma training (2); cultural safety training (1); disability awareness and communication skills training (1); and training on theory of change, benefits for their role, the centre, CLCs in general and clients (1).

(Some responses encompassed more than one theme, so the total number of responses in this list exceeds the total of 21 respondents).

6.6 Suggestions for additional, complementary work outside the scope of the framework

In this section, we canvass three ideas for additional work beyond the suggested Phase 2 trial.

1. We note that the Phase 1 trial sites are still in the implementation stage and will pursue evaluation in 2022 after a reasonable period of implementation and monitoring. If possible, some resourcing to support the centres to synthesise the evaluation findings and draw valid conclusions would be an ideal way to conclude their trial of the framework.
2. We suggest a possible remedy for a data limitation noted in the table on page 9 of this report: measuring client churn across the sector. Understanding client churn is fundamental to understanding the nature of demand at the sector level and improving the client journey. For example, this could help to understand how many centres on average a client approaches for assistance before they receive the support they need. This could also help to understand more about those clients – are they high needs or high risk clients at risk of slipping through the cracks, or perhaps ‘system superusers’ who may not always be in the highest need and perhaps should be diverted to alternate service or self-help options?

The easiest way we can think of to collect this data would be by introducing a universal community legal centre client identifier. This would need to be developed with due regard for client privacy and confidentiality. The use of such an identifier may have other potential benefits such as automated conflict checking and identifying appropriate referrals where there are conflicts. We recognise this is a challenging and complex piece of work but also suggest that if it can be done in health and education, it can probably be done in the legal assistance sector with sufficient resourcing, safeguards and commitment.

3. We suggest a way to begin addressing another data limitation noted in the table on page 9: measuring client impact. Whilst the annual client survey offers valuable insights into client experience and impressions after receiving a service, this does not tell the story of longer term impact resulting from the legal assistance provided. Gold standard data about client impact would include tracking longitudinal outcomes, hearing client voices and interpreting these alongside practitioner insights. This would ideally be linked to the client record to allow analysis of outcomes by service type, legal matter, intensity of service and client characteristics.

This would be resource intensive but would more fully answer the question: ‘which interventions work best and for whom? (and possibly, why?)’ Without this, demand management changes can only be built on measurement of changes in activity, client characteristics, client satisfaction and some immediate outcomes, but not long-term impact. This evaluative work would position centres for the anticipated change to impact funding down the track. We have done serious thinking about this and developed a monitoring and evaluation framework for a community legal centre in a piece of work independent of this project. We would be interested to talk with that centre and CLCQ about whether this work could be shared and drawn on for future evaluation work.

Recommendation 5: Consider resourcing follow up evaluation or evaluation support for the four Phase 1 trial sites to complete the cycle of learning from the Phase 1 and to inform Phase 2.

Recommendation 6: Explore the feasibility of, appetite for, and options to develop, a universal client identifier to allow a better understanding of sector-wide demand and client churn.

Recommendation 7: Explore options to engage in long term client impact evaluation to begin to build better data about which interventions work best and for whom (and possibly, why). This would support evidence-informed demand management changes and position the sector for a shift to impact funding.

6.7 Key messages for community legal centres interested in this work

If CLCQ embarks on further work around demand management, the following messages may be helpful to build into engagement processes with potential trial sites. These suggestions were generated by the action learning group as advice to centres interested in joining this work.

In addition to the key messages below, we suggest that centres interested in this work be offered a briefing on what's involved, what to expect and what will be asked of them, including indicative timeframes. This could involve the four Phase 1 trial sites so centres hear directly from peers and colleagues about the positives, while also receiving a realistic overview of the time and effort needed to commit to the process.

“Carve out time temporarily. Make the time for longer term gain.”

“The things coming out of this work can be tailored.”

“Get on board.”

“This project can provide insights into other centres’ solutions.”

“Make time to make change.”

“Regular collaboration with other centres”

“Understanding your direction/vision”

“Make time to collaborate and share with other CLCs.”

“Importance of investment of time and resources to increase impact.”

6.8 Suggestions for funders

In engaging with funders, CLCQ may find it helpful to draw on the following suggestions and reflections from the action learning group, generated as advice to the Department of Justice and Attorney-General for future work. Notably, these suggestions endorse the importance of investing in demand management and sector projects, the importance of CLCQ leading the work and the important caveat that demand management won't obviate the need to address areas of under-resourcing.

“The peak needs to be involved. They provide credibility, support and a specialist knowledge to bring centres together and collaborate in a safe way.”

“Demand management won’t fix under resourcing”

“Fund more sector projects”

“Recognise back-end services more and other resources in funding programs”

“Funding/initiatives aimed at improving demand management”

“Acknowledging what CLCs are doing beyond CLASS data”

“CLCs want to do more so they are implementing efficiencies to meet overwhelming demand”

“Without managing demand it will lead to the risk of workplace health and safety concerns. Urgency and complexity is increasing not decreasing.”

Acknowledgement and thanks

We wish to thank CLCQ and the participating community legal centres for trusting us to work alongside them, and for the opportunity to do this work. It has been richly rewarding and our privilege to work with such talented and committed people. We hope this work bears fruit over the longer term.

With particular thanks:

- For their leadership and coordination of the entire project: Sam Cooper, Rosslyn Monro, Penny Sullivan and Carly Hanson from CLCQ
- For their committed participation, insights, contributions and engagement: Cherie McLaughlin and Cathy Pereira and from Aboriginal and Torres Strait Islander Women’s Legal Service North Queensland; Tanya Diessel, Olivia Woods, Victoria Shiel and Cassie Mallet from Gold Coast Community Legal Centre; Jonathon Ward, Alison O’Quinn and Helen Situlia from HUB Community Legal; and Louise Skidmore and Miriam Grabec from Pine Rivers Community Legal Centre.
- And to the staff from buddy sites who contributed at different stages of the project, including staff from TASC, Bayside Community Legal Service, Caxton Legal Centre, LawRight and QAI.

Appendix 1:

Overview of demand management changes being trialled by each centre

Aboriginal and Torres Strait Islander Women's Legal Service North Queensland

The problem we're trying to fix is...

Missed opportunities to help clients requiring the most urgent support due to:

- Frontline staff having difficulties determining:
 - the problem type or legal issue
 - the complexity of client needs
 - the relative priorities of different clients
- Frontline staff prioritising clients presenting with heightened emotions (i.e. urgency isn't necessarily accurately reflected in someone's immediate emotions)

Inefficiencies in service delivery due to:

- Clients telling their full story to front line staff thinking they are lawyers
- Clients not being allocated to the most appropriate lawyer
- Clients not being scheduled for an appropriate duration

What we hope to achieve by making demand management changes is...

1. Improved client experience
2. More appropriate response to urgency, complexity and area of law
3. More timely response consistent with the urgency of individual needs
4. Maintain the reputation of ATSIWLSNQ as a service that can be trusted to provide a responsive and culturally safe service (enabled by being culturally intelligent, applying community knowledge, drawing on the experience and understanding of working with families over time, being flexible and responsive)
5. Continuity of lawyer across the duration of a client's legal matter
6. Make best use of CLC resources by:
 - a. Reducing # preventable repeat appointments due to incorrect lawyer allocation
 - b. Reduced time spent by frontline staff on intake process (but not at the expense of being able to provide warm referrals)

The changes we're making are...

- Update our intake and triage manual
- Transitioned from a Word Document Intake Form to a Jot Form Intake Form

The resources from CLCQ that we're using to help us are...

- Tools – Call Management Techniques
- Tools – Question Flowchart
- Tool – Staff Consultation

Other resources we're finding useful include...

- Tool – List for Prioritising Vulnerability
- Tool – Managing Conflict Scripts
- Tool – Repeat Clients- Measuring
- Tools – Call and Appointments

Our progress so far is...

- We are still in the early stages of implementing changing in the organisation.
- Frontline staff have been provided with the manual and have been asked to use them when completing a new enquiry.
- Updates in CLASS have been made to reflect intake time frames and urgency rating.
- Changes in data collection commenced on **1 August 2021**
- Changes in data collection with the updated manual commenced on **5 October 2021**

To understand if we're making a difference...

...We'll be able to analyse the following things in Power BI (meaning we can analyse the following by client characteristics, matter type, service type, service location etc)...

1. Average and range of time spent on intake by staff (overall and stratified by client and staff variables)
2. # and % clients needing repeat appointments (Note: This data needs to be considered in context. Initial appointments need to be appreciated as the starting point. Issues such as repeat appointments because of clients not bringing documents might be different than in other services, e.g. they want to determine whether they can trust the service/lawyer before sharing this information; they do not have a stable address and haven't received the documents etc.)
3. # and % repeat appointments booked because client allocated to wrong lawyer
4. # and % repeat appointments booked because client allocated to appointment without enough time [Consider data collection for discrete periods on an annual basis rather than as routine data collection]
5. # and % of clients with a single lawyer for the duration of the legal matter
6. Average difference between urgency rating of frontline staff and retrospective urgency rating of lawyers (overall and stratified by relevant variables)
7. Wait time from intake to initial advice.

We're also gathering qualitative information about our impact

8. Reported client experience
9. Feedback from lawyers and frontline staff regarding appropriateness of intake assessment by urgency, complexity and area of law
10. Reported change in frontline staff confidence and skills in determining urgency, complexity and area of law

Our next steps/other things we want to do are...

- Update CLASS to gather additional data from lawyers as to why they are scheduling repeat appointments

- Further develop the intake and triage manual to include additional information about call management techniques.
- After additional data has been collected and analysis of the question flowchart has been completed, consider whether the Client Support Officer could be trained in assisting clients with gathering their documents prior to appointments with lawyer.

Gold Coast Community Legal Centre (current as at end October 2021)

The problem we're trying to fix is...

Missed opportunities to help the most vulnerable or disadvantaged due to

- preventable repeat appointments being needed due to clients presenting without correct documentation
- some first appointments being offered by frontline staff to those the CLC can't or shouldn't prioritise
- some clients being booked for advice who don't need it (could be referred to forms or resources instead)
- some clients being booked for repeat appointments who do not have a listed vulnerability

What we hope to achieve by making demand management changes is...

1. Improve the client experience
2. Reduce wait times from first contact to first for appointments
3. Make best use of CLC resources by:
 - a) Reducing # preventable repeat appointments due to ill-prepared clients
 - b) Reducing # clients booked for first appointments who do not need advice or fit vulnerability criteria
 - c) Reducing # repeat appointments for clients who do not meet vulnerability criteria
 - d) Reducing time spent by solicitors reviewing or cancelling bookings made by frontline staff
 - e) Increasing confidence and skills of frontline staff in completing intake assessments for urgency, suitability, area of law and vulnerability
 - f) Increasing job satisfaction for intake staff and lawyers

The changes we're making are...

- Implementing toolkits provided by CLCQ, specifically:
 - Emails to send to clients who we cannot assist, providing them with information and referral options
 - Emails to send to clients who do not necessarily meet vulnerability criteria with information about their legal matter prior to booking an appointment – this will hopefully allow non-vulnerable clients to self-help and manage demand for vulnerable clients
 - Emails to send to clients before their appointment setting out important things to bring / have available for the solicitor in an attempt to help make clients better prepared for their appointments to manage demand (not wasting an appointment).

The resources from CLCQ that we're using to help us are...

- Tool – Email template – Areas DND
- Tool – Email templates – client requirements – what to bring

- Tool – Standardised email templates - NRA

Other resources we're finding useful include...

All other toolkits are valuable and useful as re-freshers for admin / intake staff and will be utilised in induction matters (such as the conflict scripts, call management processes etc)

Our progress so far is...

We held an all-staff team meeting to gather reflections and feedback from staff *before we started making changes*. At the meeting, staff reflected on their confidence in the accuracy of intake assessments by urgency, suitability, area of law and vulnerability. This allowed honest discussion about factors that affect intake and generated problem-solving discussions that will inform some customisation of the tools developed by CLCQ. Questions about confidence in the accuracy of intake assessments will be repeated at the end of the project, along with questions about job satisfaction, to assess the change in confidence and satisfaction reported by staff.

We've reviewed the CLCQ tools and made some customisation drawing on the insights from the staff meeting.

We are in the process of creating ways for admin / intake staff to efficiently send emails to callers whilst they are on the phone without adding to their workload. We are trialling "Quick paths" feature in outlook to store email templates to make it easy to send. Once Quick Paths is set up, we will commence sending the appropriate email to callers.

To understand if we're making a difference...

We'll be able to analyse the following things in Power BI (meaning we can analyse the following by client characteristics, matter type, service type, service location etc)

1. # and % appointments less than 15 minutes
2. # and % clients needing repeat appts
3. # and % repeat appts booked because client ill prepared
4. # of clients with vulnerability criteria increase

We're also gathering qualitative information about our impact

5. Reported change in staff confidence, skills, wellbeing and satisfaction
6. Insights from a small selection of clients at design and data interpretation stage
7. Client perceptions of usefulness of email sent prior to appointment

Our next steps/other things we want to do are...

Set up Quick Paths in outlook app for all admin / intake workers with the email templates pre-loaded so they are not having to open a Word doc and 'copy and paste' into emails. Will be easy to apply the template and enter clients email then send all in the time that they are on the phone.

HUB Community Projects

The problem we're trying to fix is...

Missed opportunities to help clients who are the most vulnerable or disadvantaged due to:

- A multi-step intake process leading to delays in decision making about whether a client will be seen by HUB and potential for poor client experience

- A long wait for services leaving people who are already experiencing vulnerabilities to be at increased risk
- Frontline staff having difficulties determining:
 - the problem type or legal issue (especially intake volunteers)
 - the complexity of legal issues
- Limited standardised tools and procedural training material for intake/admin which may lead to poor client experience with the service due to issues such as receiving conflicting information, creating unrealistic expectations
- Lack of clear procedures for communication between lawyers and intake; e.g. about providing repeat client appointments
- Existing processes increasing the possibility that clients may be conflicted out of accessing services from HUB either in the short or long term

What we hope to achieve by making demand management changes is...

1. Improved client experience at first point of contact (getting the right response - advice, onward referral, information; not having appointments cancelled; avoidance of conflicts being created unnecessarily)
2. Reduced time spent by frontline staff and volunteers on intake processes
3. More appropriate response to urgency, complexity and area of law
4. Reduced wait times for:
 - a. confirmation of suitability for HUB services / alternate services
 - b. advice appointments
5. Reduced number of unnecessary repeat appointments for:
 - a. matters that the complexity is beyond the scope/capacity of HUB
 - b. clients who do not fit vulnerability criteria
6. Increased confidence and skills of frontline staff and volunteers in completing intake assessments with respect to urgency, complexity and area of law

The changes we're making are...

- Implementing tools & processes (introducing use of CLASS triage) to manage intake and capture information needed to make triage assessments (e.g. court dates / documentation / deadlines / vulnerability criteria)
- Implementing tools to improve intake assessments by urgency, suitability, area of law and vulnerability (introducing a "triage lawyer" role)
- Implementing processes to improve communication between intake/admin and clients (within CLASS)
- Implementing a new appointment booking system
- Implementing processes to improve communication between lawyers and intake regarding future advice appointments for clients

- Recording reasons for referral – especially where due to capacity and timeframe

The resources from CLCQ that we're using to help us are...

- Conflict of interest scripts

Our progress so far is...

- We held an all-staff team meeting to gather reflections and feedback from staff before we started making changes (13 July 2021)
- We trained 21 intake volunteers on the new tools and processes
- We trained 4 admin staff on new tools and processes
- We trained 3 lawyers on the triage lawyer processes
- We've made changes to our data collection
- We will review and start using a selection of tools from CLCQ from 31 October 2021.

To understand if we're making a difference...

...We'll be able to analyse the following things in Power BI (meaning we can analyse the following by client characteristics, matter type, service type, service location etc)

1. Average and range of time spent on intake by frontline staff and volunteers (overall and stratified by relevant variables)
2. Wait time from intake to offering HUB advice appointment OR making onward referral
3. # and % clients meeting vulnerability criteria
4. # and % clients who received repeat appointments
5. # and % clients attending repeat appointments having determined that their needs are beyond the scope/capacity of HUB
6. # and % of referrals for reasons identified in CLASS

We're also gathering qualitative information about our impact

7. Reported client experience
8. Reported change in frontline staff and volunteer confidence and skills in determining problem type and complexity of legal issues

Our next steps/other things we want to do are...

- Hold a staff focus group session to gather data on the impact of the changes so far.
- Review the CLCQ tools and make some customisation drawing on the insights from the staff meetings.
- Implement a selection of tools from CLCQ by the end of October.
- Hold another staff focus group session following the implementation of the CLCQ tools at the end of November to gather qualitative data on their impact.

Pine Rivers Community Legal Service

The problem we're trying to fix is...

Missed opportunities to help the most vulnerable or disadvantaged due to

- staff making advice bookings for clients who the CLC can't or shouldn't prioritise
- time spent by Principal Solicitor and Legal Support Worker supporting front line staff or reviewing and cancelling bookings
- time spent by frontline staff managing unrealistic expectations from members of the public and attendant staff stress when clients become threatening
- some clients being booked for advice who don't need it (e.g. could be referred to forms)
- Preventable repeat appointments being needed due to clients presenting without correct documentation
- lower than expected proportion of CALD clients accessing the service.

What we hope to achieve by making demand management changes is...

1. Improve client experience at first point of contact (getting the right response - offer of assistance or onward referral/ information, not having appts cancelled)
2. Increase proportion of CALD clients
3. Make best use of CLC resources by:
 - a. Reducing # clients booked for first appointments who do not need legal advice or fit eligibility/vulnerability criteria
 - b. Reducing # cancelled appointments due to incorrect frontline assessment
 - c. Reducing time spent by Principal Solicitor and Legal Support Worker assisting frontline staff or reviewing or cancelling bookings made by frontline staff
 - d. Reducing # preventable repeat appointments due to ill-prepared clients
 - e. Reducing stress and increasing confidence and skills of frontline staff in completing intake assessments by urgency, suitability, area of law and vulnerability
 - f. Increasing job satisfaction for intake staff and lawyers

The changes we're making are...

- Training and having a new admin officer trial tools to improve intake assessments by urgency, suitability, area of law and vulnerability
- Training other intake staff and implementing use of the tools more widely once we've discussed feedback from our new team member
- Working developmentally with leaders of local culturally and linguistically diverse communities to understand their legal needs and how Pine Rivers CLC can improve access and responsiveness for these communities.

The resources from CLCQ that we're using to help us are...

- A bundle of tools

- Call management techniques
- List for prioritising vulnerability (to sit next to phone)
- Managing conflicts script ideas
- Question flowchart (by area of law for comprehensive triage service)
- Repeat clients – measuring (how to implement a tool to ensure repeat appointments are being given to vulnerable clients)
- Script – calls and appointments (how to write succinct notes/ what to say when answering the phone)
- Staff consultation tool for change management (measuring whether intake staff and lawyers are aligned)
- Email templates- standardised- re area of law that the centre does not provide advice on
- Email templates- standardised- re areas d law the centre does provide advice on, where booking not appropriate.

Our progress so far is...

We have used the staff consultation tool for change management. We held an all-staff team meeting to gather reflections and feedback from staff *before we started making changes*.

We asked staff intake workers to reflect on a series of questions such as how confident they are in completing intakes that accurately assess as to urgency, suitability for assistance by the centre, area of law and client vulnerability on a scale of 1-5; (generally a 4 but it does depend on the person that we are speaking to as well) ; what external factors impact their confidence to complete accurate intakes - such as busy-ness of the centre, legal matters type, client aggression, other factors (other factors raised were threats of self-harm, conflict checks and getting all of this information, language barriers, emotions of the person calling in). We also asked Solicitors to reflect on how confident they are that matters have been accurately assessed (generally positive – most improvement needed in the assessment of the suitability of the area of law and prioritising client in terms of vulnerability).

Questions about confidence and skills in the accuracy of intake assessments will be repeated at the end of the project, along with questions about job satisfaction, to assess the change in confidence and satisfaction reported by staff.

We are reviewing the other CLCQ tools and will be making some customisation drawing on the insights from the staff meeting.

In addition, the admin team met and decided which of the tools we would start the new admin person trialling (with a meeting planned for after 2 weeks) - and then again, a follow up meeting to start introducing more of the tools, as customised.

Tools to be implemented first - call management techniques, managing conflict of interest calls, (scripts) list for prioritising client vulnerability and managing and measuring reasons for repeat appointments. We've made changes to our data collection to support the following.

To understand if we're making a difference...

...We aim to be able to analyse the following things in Power BI (meaning we can analyse the following by client characteristics, matter type, service type, service location etc)...

1. # and % bookings cancelled by Principal Solicitor or Legal Support Worker
2. # and % repeat appts booked because client ill prepared
3. More data is being kept about 'referrals to' (from reception) and 'referrals from' reception.

We're also measuring time spent on each intake but have not yet linked this to the CLASS record for those callers who do become clients, so this data can't be analysed by all the other variables in PowerBI yet. We do plan to add this data to CLASS.

Similarly, we're tracking the number of clients referred by the daytime intake team to the drop-in evening clinic but haven't yet linked this to the CLASS ID. We're looking at the feasibility of doing this so we can analyse this data by client characteristics, matter types etc.

In the long term, we'll also monitor the change in our client cohort especially # and % of CALD clients.

Over time we'll also be gathering qualitative information about our impact

4. Reported change in intake staff confidence and skills in relation to accuracy of intake process and bookings by urgency, suitability, area of law and vulnerability (we've gathered the baseline feedback from staff at a team meeting)
5. Reported change in staff job satisfaction and wellbeing (intake staff and lawyers)
6. Perception of Principal Solicitor and Legal Support Worker about time spent supporting intake, reviewing bookings
7. CALD community leader insights and feedback
8. Reported client experience.

Our next steps/other things we want to do are...

- Continue to work through the tools provided by CLCQ and customise them and decide how best to put them to good use at the service.
- Update our reception manual incorporating the new adapted tools being trialled.
- Focus on the "area of law" triage next.

Appendix 2:

Tools and resources developed by CLCQ in consultation with the trial sites (+ two tools developed by Clarity Consortium as indicated)

TOOLS	
1	Risk assessment tool
2	Consequence questioning
3	Intake questions
4	Call management techniques
5	Client intake flowchart
6	Email template – Client requirements – Civil Law
7	Email template – Client requirements – Domestic and Family Violence
8	Email template – Client requirements – Criminal Law
9	Email template – Client requirements –Child protection/ Family Law
10	Prioritising client vulnerability chart
11	Managing conflicts script
12	Questions flowchart – determining legal issues
13	Repeat clients Guide – Managing and measuring reasons for repeat appointments
14	Script for answering phone and booking legal advice
15	Baseline data analysis resource (developed by Clarity Consortium)
16	Staff consultation tool (developed by Clarity Consortium)
17	Standardised email templates for areas of law the centre does do for clients not requiring urgent appointment
18	Standardised email templates for areas of law the centre doesn't do
RESOURCES	
1	Webinar – collaboration with Law and Justice Foundation Law informed research: Intake and triage and the value of telephone legal information services to clients
2	Webinar - CLCQ Innovation and Technology: Opportunities to enhance access to justice Andrea Perry-Peterson

3	Video resource – Training CLASS DIY Reporting
4	Webinar – collaboration with CLCA and Green Circle Legal Centre (WA) Law informed research, intake and triage
5	Video resource – Training Power BI training series
6	Webinar - Introduction to the CLC sector