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## Executive Summary

The AmeriCorps\*State Justice for Montanans Project will have 18 AmeriCorps members who will serve as navigators of the justice system to help low income individuals find the legal information and resources they need to solve their legal problems. Members will be located in Billings, Bozeman, Great Falls, Helena, Kalispell, and Missoula, Montana, but will provide services statewide through circuit rides and telephone and web-based services. At the end of the first program year, the AmeriCorps members will be responsible for helping 15,000 low and moderate income Montanans gain knowledge of the legal system and their legal rights and responsibilities, as well as learning what to do or not do to solve their legal problems. In addition, the AmeriCorps members will leverage an additional 200 volunteers that will be engaged in helping low and moderate income Montanans access the justice system and receive the intended benefit of our laws. This program will focus on the CNCS focus areas of Economic Opportunity and Capacity Building and the self-identified focus area of Access to Justice. The CNCS investment of \$226,965 will be matched with \$223,911, \$166,161 in public funding, and \$57,750 in private/other funding.

## Rationale and Approach/Program Design

a. Problem/Need. The Justice for Montanans Project will address the ongoing problem in Montana of a lack of access to legal information, advice and resources for low and moderate income Montanans. This prevents low and moderate income people from having the intended benefit of our laws, and achieving the safety, security and stability that they need to protect their basic needs.

A 2010 Montana Legal Needs Study reported that over 33,000 low income households in Montana had at least one civil legal need, with 67% of those households facing more than one civil legal problem in a given year. 77% of those surveyed that reported having a legal problem identified a need for legal assistance but reported doing nothing to address that need (2010 Montana Legal Needs Survey Final Report available at <http://www.mtjustice.org/wp-content/uploads/2012/09/2010-Legal-Needs-Executive-Summary-Revised1.pdf>). Unfortunately, the demand for free and low-cost civil (non-criminal) legal services in Montana far outstrips the supply. The Montana Legal Services Association (MLSA) is the only statewide provider of free civil legal assistance to the poor and has 13 casehandling attorneys available to provide services to the approximately 182,000 people in Montana that live at or below 125% of the poverty line according to 2010 census information. The result is that MLSA has only 1 attorney available for every 14,000 people in poverty in Montana. By contrast there is 1 attorney licensed in Montana for every 274 Montanans that have incomes above 125% of the

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poverty level (Rebecca L. Sandefur and Aaron C. Smyth, 2011 Access Across America: First Report of the Civil Justice Infrastructure Mapping Project, American Bar Foundation). This creates a vacuum where people without the means to hire a lawyer do not have access to legal advice or information that will help them resolve their legal issues. It also creates the growing problem of unrepresented litigants appearing in our court system. These litigants often come in to Court unprepared to handle their legal issue, and without the forms or procedural information to handle their problems on their own. Without the right information and resources, a person has no access to the justice the drafters of our Constitutions worked so hard to guarantee.

The civil legal problems of low and moderate income people in Montana involve essential human needs such as protection from abuse, lack of access to safe and habitable housing or necessary health care, and relief from financial exploitation. If, for example, a low-income family receives an unlawful eviction notice, that family could simply be evicted and fall further into poverty or the family can access appropriate legal resources to help them assert their rights under existing laws to stay in their home. Without someone making them aware of the avenues available for help, they may simply be evicted. Ensuring equal access to justice for all Montanans helps maintain public confidence that the legal system is fair to people of all income levels.

Poverty is a real problem in Montana. According to the American Community Survey 5-year estimates for 2007-2011 used by the United States Census Bureau, 14.3% of Montanans are living below the federal poverty level of \$23,550 for a family of four. In rural counties the poverty rates may be much higher, for example in Glacier County the poverty rate is 27.7%, Big Horn County the poverty rate is 26.7%, or Blaine County the poverty rate is 27.8%. With hourly rates for attorneys ranging from \$125 to \$300, traditional attorney representation is simply not an option for many Montanans.

### b. AmeriCorps Members as Highly Effective Means to Solve Community Problems: Evidence-Based and Measurable Community Impact

**Theory of Change and Logic Model** The Justice for Montanans project is a public/private partnership that has become a highly effective means of solving the community problem of access to justice. Low and moderate income people in Montana are unable to afford the legal assistance they need to protect their basic needs, and Justice for Montanans members provide help in navigating the complex barriers of the legal system so that people can find the information, forms and help they need. All of the partner organizations have a longstanding history of working together to expand access to justice by developing court forms and other legal informational resources, expanding the use of technology in

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legal services delivery, and conducting various outreach and education efforts. Unfortunately, all of the project partner organizations have also faced challenges in connecting people with available legal services, raising community awareness of legal rights and access to justice issues, and coordinating and supporting pro bono attorneys and other community volunteers. In light of the ongoing economic situation, the need for access to free and low-cost legal services and resources is especially dire.

Members serving with the Justice for Montanans project played a critical role in increasing access to information and services for Montanans needing to address their civil legal needs. In fact in the 2012-2013 service term, members serving with the project delivered information and resources to 17,029 Montanans. For many of those Montanans, Justice for Montanans members fulfilled the promise of access to justice contained in the Federal and Montana Constitutions and removed the barriers that keep people in poverty.

Knowledge is power and providing people with legal information and resources helps them gain knowledge of the legal system and their rights and responsibilities. This leads to empowered and informed decision making that will help people achieve their goals, resolve their legal problems, and protect basic needs such as food, shelter, income, health care, personal safety, and family relationships. With information, a low income elderly person whose social security earnings are being unlawfully garnished by a creditor will be able to assert her rights, stop the illegal practice and have the resources she needs to afford food and medicine. With information, a low income family that is being unlawfully evicted from their home will be able to assert their rights, stop the eviction and retain a stable environment for their school-age children.

Evidence Base. Providing legal information, resources and referrals to low and moderate income people is an effective method to address the community challenge of lack of access to justice. A body of evidence gleaned from studies of telephone based legal hotlines suggests that the approach of the Justice for Montanans Project is proven method for delivering positive outcomes. Although the Justice for Montanans members will be delivering legal information in person as well as over the telephone, MLSA believes that these studies provide the basis for an evidence-informed approach to assisting clients with their civil legal problems. The results of two such studies are summarized below.

Many members provide services by telephone due to Montana's remote, rural nature, and a 2006 Client Outcome Study of Legal Hotlines by the AARP Foundation addressed the effectiveness of legal advice and information given by telephone regarding a consumer or public benefits issue (Shosanna

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Ehrlich, Ellie Crosby Lanier and Lanae Davis, 2006, Legal Hotlines Outcome Study, see <http://legalaidresearch.files.wordpress.com/2013/03/legal-hotlines-client-outcome-study-2006.pdf>). This study worked with seven diverse legal hotlines across the country to identify cases where a client was advised to take a follow up action to enforce their legal rights. The study concluded that providing information to low income people with legal problems regarding a discrete act to solve that problem was beneficial to the majority of callers, and that the caller reported a change for the better as the result of the legal intervention. The role of JFM members is similar to the legal hotlines of the study because members also provide callers with options to help their situations that hopefully lead to informed decision making by the callers and improved circumstances.

Similarly, a 2012 assessment of telephone based legal assistance in Pennsylvania showed that providing legal information and advice to callers was an effective method for helping them resolve their civil legal problems (Ken Smith, Kelly Thayer, and Kathy Garwold, 2012, final Report on the Assessment of Telephone-Based Legal Assistance, see [http://legalaidresearch.files.wordpress.com/2013/03/aja\\_final-overall-report\\_final\\_7-9-2012\\_with-covers\\_no-appendices.pdf](http://legalaidresearch.files.wordpress.com/2013/03/aja_final-overall-report_final_7-9-2012_with-covers_no-appendices.pdf)). One out of every three recipients of assistance reported positive outcomes that were tangible and measurable, and a majority of recipients met some or all of their goals in seeking legal help. Along the same lines, JFM members help callers and clients reach their goals and learn what to do or not do in order to solve their legal problems. Members do intake over the phone and also provide in-person assistance to people looking for legal information.

c. Member Training. Training is an important part of being a JFM member. Members receive training on AmeriCorps Rules and Regulations, how to provide legal information and referrals, customer service skills and specific legal topics, to name a few of the subjects covered. JFM members also receive training in the difference between providing legal information and legal advice (which can only be given by a licensed attorney). Although JFM members are not attorneys, members can help people find the forms and information they can use to help themselves. JFM members receive in-person training through an orientation at the beginning of their service, a mid-year training, and training at the close of their service. In addition, JFM members will receive monthly training by telephone or webinar either from MLSA as the grantee organization, or from the partner sites. The training given to JFM members throughout the year is aimed at one of three goals: 1) ensuring that members have a positive and beneficial term of service, 2) ensuring that members are aware of and follow rules and stay away from prohibited activities, and 3) leaving their individual communities and the state of Montana a better place.

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Month One: Initial orientation for JFM members has two components -- an all member orientation, followed by a site specific orientation. At the all member orientation, training is provided on AmeriCorps requirements, and how to respond to disasters in their community. In addition, all members receive training on substantial legal topics like "Legal Information vs. Legal Advice", and "Consumer Protection Issues", as well as working with low income people and people with disabilities, working with people in crisis, and cultural sensitivity. Following the all member orientation, members participate in on-site training and orientation with their host programs. Topics vary according to host program but include site procedures and specific topics related to each host program's focus. By attending comprehensive training at the beginning of their term of service, members are well prepared to aid others in the navigation of the legal system.

Months Two through Six: Members participate in monthly all member calls. These calls have a standing agenda that includes time for the members to reflect on their service, but also focuses on AmeriCorps rules and regulations, substantive areas of law, expanding the members' awareness of resources, and their understanding of the JFM program and reporting requirements.

Month Seven: In March, members gather for the in-person mid-year training. Mid-year training lasts a day and a half and is scheduled to coincide with the Montana All Member Gathering so that JFM members can participate in their own training and also attend a gathering of AmeriCorps members from all across the state.

Months Eight through Ten: Members return to training through conference calls and webinars. Just as in the first half of the term, the calls focus on upcoming service and outreach projects, refreshers on AmeriCorps rules and trainings on substantive areas of law that relate to all member's service.

Month Eleven: The close of service training for JFM members is held at the end of their term. Topics include "Effective Job Search Practices," "Resumes and Cover Letters" and "Interviewing Tips and Strategies." Members will also participate in a discussion of life after AmeriCorps and a presentation on how to use the Segal Education Award.

d. Member Supervision. Each site has a supervisor, whether at MLSA or one of the partner agencies, that is responsible for the day to day supervision of the members. Site supervisors for JFM members include judges, staff attorneys, and court administrators. Site supervisors are selected based on their familiarity with what the members will be doing. Site supervisors are responsible for working with members to ensure that AmeriCorps regulations are followed, member duties are appropriate, and reporting is done in a timely and accurate fashion. Supervisors are also responsible for making sure that accommodations are offered to any members with disabilities. Supervisors are monitored and

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trained by MLSA's AmeriCorps Coordinator and the Project Director. The Project Director and AmeriCorps Coordinator conduct site visits and answer questions from supervisors and members.

Each of the four partner organizations also has designated a coordinating supervisor who assists with member recruitment, works with the local supervisors and makes sure the project stays on track. Contact between the Project Director or AmeriCorps Coordinator and the coordinating supervisors takes place at least monthly, and often three to four times a month. Coordinating supervisors have weekly contact with site supervisors.

Training for supervisors occurs at the beginning of the term, and whenever a new supervisor is added. This training includes information about the AmeriCorps regulations, the JFM Project, reporting requirements and the expectations for JFM members. Project staff members also encourage early reporting of any potential or actual violations of AmeriCorps regulations. Project staff provide updates regarding changes in AmeriCorps regulations as appropriate throughout the year.

e. Commitment to AmeriCorps Identification. All partner agencies are committed to the JFM Project as an AmeriCorps program. Partner agencies and sites are trained on what it means to be an AmeriCorps member and the need to recognize AmeriCorps service. Project staff, partner agencies and JFM members are reminded regularly to identify themselves not as staff for the organization they serve with, but as AmeriCorps JFM members serving with their organization. All JFM members receive AmeriCorps branded gear. This includes for example AmeriCorps decals, water bottles, and t-shirts. When they are working in the community, members are encouraged to always wear or carry with them the AmeriCorps logo. All project documents include AmeriCorps and JFM logos.

Members are trained on how to explain what it means to be an AmeriCorps member. Members are encouraged to develop an "elevator speech" to explain not only their individual service, but also what it means to be part of the AmeriCorps community. The JFM project sees this as especially important for its members since they serve in positions that put them in contact with the public every day.

### Organizational Capability

a. Organizational Background and Staffing. The JFM project is a partnership of the Montana Legal Services Association (MLSA), the Montana Supreme Court Office of the Court Administrator's Court Help Program (Court Help), the State Bar of Montana and the Montana Attorney General's Office of Consumer Protection and Victim Services (OCPVS). MLSA is the lead applicant and the grantee responsible for administering the project and the funds. As demonstrated below, MLSA has the experience, staffing and management structure in place to implement the proposed project.

Incorporated as a 501(c)(3) nonprofit organization in 1967, MLSA has provided legal services to low-

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income Montanans throughout the state for over 40 years. MLSA operates as a statewide law firm that provides services throughout the state by telephone, videoconferencing, live web chat, in-person meetings and court appearances. For example, a housing attorney based in Helena will provide a range of services from legal advice to full representation to clients in all corners of the state. MLSA includes AmeriCorps programs as part of its service delivery and community engagement strategy.

MLSA is governed by a Board of Trustees made up of attorneys, community representatives, and client eligible members from across Montana. The MLSA Board meets quarterly and actively guides the direction of MLSA. MLSA Executive Director Alison Paul (apaul@mtlsa.org or 406-442-9830 x. 115) oversees the organization, and has been actively involved in all of MLSA's AmeriCorps programs. Alison also serves as the Project Director for the Justice For Montanans Project. Alison has over 20 years of experience as an attorney, and 10 years of experience managing AmeriCorps grants. Alison is recognized as a national leader in using technology to provide legal services to low income people and was one of six Executive Directors invited to the first White House Forum on Civil Legal Aid, in part because of her innovative use of AmeriCorps members to provide access to justice for low income Montanans.

The Justice for Montanans Project is administered on a day to day basis by an AmeriCorps Coordinator who is supervised by the Project Director. The AmeriCorps Coordinator Casey Stephenson (cstephen@mtlsa.org or (406) 442-9830 x 129) is a part-time employee exclusively dedicated to managing the JFM project. The Coordinator provides the day to day administration of the JFM Project and is responsible for recruitment of JFM members, training, and grant reporting among other things. MLSA has a commitment to recruiting members with disabilities, and the AmeriCorps Coordinator is responsible for following through on that commitment. Casey has served as both an AmeriCorps member and an AmeriCorps leader so is uniquely qualified to coordinate the JFM Project. The financial administration of the JFM Project is handled by Lisa Heimbach, MLSA's Director of Finance (lheimbac@mtlsa.org or (406) 442-9830 x 126). Lisa is responsible for all financial aspects of MLSA and has over five years of experience in managing AmeriCorps grants. Lisa and Alison have been involved in successful implementation of the JFM Project since its inception in 2009. Members serving at MLSA are supervised by Tracie Poindexter, MLSA's Intake Supervisor. Each partner agency has one dedicated staff member who is the primary organizational contact for the project. That staff member may also be a member supervisor, depending on the location of the members. Each member is provided with an on-site supervisor who provides oversight and direction for the member activities. The Supreme Court Help Program Administrator, Erin Farris

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(efarris@mt.gov or (406) 841-2975), manages the project at MLSA's largest partner site, oversees members in the Self Help Law Centers and helps provide relevant training throughout the year to all JFM members.

MLSA has extensive experience managing AmeriCorps grants. For over nine years, MLSA has been an intermediary for the MLSA VISTA Project, which places AmeriCorps\*VISTA members with organizations throughout Montana. For over 5 years, MLSA has also sponsored Equal Justice Works AmeriCorps Legal Fellows. MLSA recently began the fifth year of the AmeriCorps\*State Justice for Montanans Project. For all three AmeriCorps programs, MLSA administers the grants and fiscal management, recruits and supports members, and carries out other aspects of program administration. MLSA has an annual budget of approximately \$3 million, and has obtained various sources of funding for service activities and initiatives. At any given time, MLSA has approximately 30 funding sources, including the Legal Services Corporation, the Montana Justice Foundation, the United States Department of Justice, and Indian tribes. The proposed project represents approximately 8% of MLSA's budget. MLSA is a grantee of the federally funded Legal Services Corporation, and accordingly all of its funds must be used consistent with the Legal Services Corporation Act of 1974, as amended in 1977 (42 U.S.C. §§ 2996 et. seq.), its implementing regulations (45 C.F.R. § 1600 et seq.), and other relevant law.

b. Compliance and Accountability. MLSA will ensure compliance with AmeriCorps rules and regulations through a combination of education, oversight and accountability. For members, compliance starts with recruitment. Potential members are informed of the AmeriCorps prohibited activities during the initial recruitment phase so that they can make an informed choice about their service. Extensive information on the AmeriCorps rules and regulations is included in the member orientation training and covered in the member handbook. A refresher on AmeriCorps restrictions is included in the mid-year training for members. At each of these trainings, Project staff members specifically highlight the prohibited activities as they are listed in the member handbook and agreement, and remind members of the prohibitions as they relate to specific events or activities.

New JFM Staff will receive training on the AmeriCorps rules and regulations as part of their new employee orientation. In addition, they will attend the training offered by the Governor's Office of Community Service (OCS) for new program staff. Staff also participate in any ongoing or refresher training offered by OCS. Project staff members regularly read and disseminate any new guidance on AmeriCorps rules and regulations, and pass on communications as appropriate to site supervisors and members to ensure compliance. Finally, project partners and site supervisors also receive training on

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AmeriCorps rules, regulations and prohibited activities as part of their orientation to the JFM project.

MLSA will prevent and detect compliance issues by having Project staff provide hands on oversight of all AmeriCorps activities, always looking through the lens of the AmeriCorps regulations. Project staff will send periodic reminders regarding AmeriCorps regulations to members throughout the service year, and will include information on AmeriCorps prohibited activities in the monthly member calls. MLSA will also include project partners and site supervisors in these compliance reminders.

Information on prohibited activities is included in the partner site agreement, and Project staff review these restrictions with the partners each program year. MLSA will look for compliance issues when making its site visits, and will immediately inform the site if any violations are discovered. All members' files will also be reviewed by senior management to ensure compliance and catch any missing documentation.

MLSA will hold itself and partner sites accountable if risk or non-compliance issues are identified by monitoring and addressing issues raised either internally or by OCS. If particular issues do arise, MLSA will work to bring the situation into compliance, and will take specific action to avoid the issue in the future. Depending on the severity of the problem, these actions can include remedial training of staff on the regulations, more strict review of member activities and potential disqualification from participating in the JFM project.

c. Past Performance for Current Grantee and Former Grantees Only. MLSA has met its performance measure targets for all of the past three grant years. In addition, over the three grant cycles, the JFM project has been able to increase the number of people served by 65% from the 2010-2011 level. This is an astounding increase over a short period of time and many factors contributed to it including the addition of a new project partner, an increase in members from 13 to 16, and the continued downturn in the economy resulting in more people seeking assistance.

In the 2010-2011 grant cycle, one JFM performance measure focused on recruiting volunteers. The target was to recruit 30 volunteers that would donate 450 hours of time. JFM members recruited 66 volunteers who gave 606 hours. Another measure was to provide civil legal and citizenship training to members. The target was for 75% of the members to increase their knowledge. In fact, 90% of the members reported a positive impact on their knowledge from the trainings.

In the 2011-2012 grant cycle the single performance measure focused on increasing access to justice for Montanans. The target was to increase the number of Montanans receiving services by 15%, and that 60% of those who got some kind of help would feel better equipped to handle their legal issue. When the numbers came in 30% more people has access to justice and 64% of those that got some

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form of assistance felt better equipped to handle their legal issues.

In the 2012-2013 grant cycle one performance measure focused on consumer awareness. The target was to conduct at least three consumer awareness campaigns and have 50% of those surveyed report an increase in knowledge about consumer legal issues. The campaigns were to reach at least 300 people. Four campaigns were conducted reaching 5,060 people with 61% of those surveyed reported increased knowledge. The second performance measure called for assisting 11,000 people and having 65% of those surveyed report they were better equipped to handle their legal problems. 17,029 people were assisted and 80% reported that they had a better understanding of their issues.

Enrollment: The enrollment rate for the AmeriCorps State Justice for Montanans Project was 100%.

Retention: The retention rate for the AmeriCorps State Justice for Montanans Project was 100%.

d. Continuous Improvement. The Justice for Montanans project takes the attitude that "we can always do better." Project staff solicit timely and regular feedback from the people served, the members, the partner agencies and the community. Low and moderate income people receiving services through the JFM project are surveyed regarding their experience and the benefit of the services they received. Members are surveyed on a regular basis regarding their service experience and training needs. Regular feedback is sought from partner agencies regarding the JFM project, the members and the community benefits that are being provided. In addition, in 2013, the JFM Project has been participating in a community survey sponsored by the Montana Access to Justice Commission on the gaps and barriers in legal services around the state. Members and Project staff are surveying low income Montana residents, and community partners regarding the quality and quantity of the legal services available in their communities. This process of gathering feedback from community partners has been very beneficial to JFM Project members and staff and MLSA plans to continue to survey community partners every year.

### **Cost Effectiveness and Budget Adequacy**

a. Cost Effectiveness. As the budget reflects, the Justice for Montanans project is requesting \$12,609 per MSY. This rate reduces the cost per member from the previous year of formula funding, does not exceed the maximum allowable cost, and reflects the Project's ongoing commitment to increase grantee share and decrease reliance on federal funds. The CNCS investment of \$226,965 will be matched with \$223,911.

The JFM project is a cost effective approach for addressing the identified community need of access to justice for low and moderate income people in Montana. In the 2012-13 grant year, the JFM Project was able to leverage an investment of \$172,895 in federal funds to provide legal information and

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resources to over 17,000 low and moderate income Montanans located throughout the state. This means that 1 person was served for every 10 dollars of federal funding. Additionally, JFM members help people to correctly handle their legal issues on their own which saves both the clients and the courts time and money. Also, members enlist the help of pro bono attorneys who will continue to provide assistance long after the member is gone, providing free legal assistance for many low-income clients.

b. Budget Adequacy. The non-CNCS funding and resources necessary to support the project include \$122,547 in cash match from all partners, and \$101,364 in estimated in-kind match from all partners, as follows:

- \* Court Help Program: \$46,820 cash, \$76,022 in-kind.
- \* OCPVS: \$29,075 cash, \$6,675 in-kind.
- \* OCPVS Foreclosure: \$7,569 cash.
- \* State Bar of Montana: \$13,538 cash, \$6,775 in-kind.
- \* MLSA: \$25,545 cash, \$11,892 in-kind.

MLSA's match is funded by the Legal Services Corporation and the Montana Justice Foundation. All partners have already committed to providing all resources necessary for the successful operation of the AmeriCorps project. MLSA, OCPVS and the Court Help program have successfully partnered on this project since its inception and all have built the expenses of the program into their general operating budgets. The State Bar of Montana joined the project in 2012, as part of a small expansion of the program and also includes the operational expenses in its general operating budget.

### Evaluation Summary or Plan

Description of the Intervention or Program to be Implemented

JFM members will provide legal information and referrals to low and moderate income Montanans to help them obtain access to the justice system and have increased security in achieving and protecting their basic needs. As a result, the JFM Project theory of change is that JFM activities will help remove the legal barriers that keep people in poverty. These barriers include lack of access to adequate housing, health care and healthy food, and stability and safety in family relationships. The anticipated short-term and immediate term outcomes of the project are that low and moderate income Montanans:

- \* Will gain knowledge of the justice system;
- \* Will gain knowledge of their legal rights and responsibilities;
- \* Will learn what to do or not do to solve their legal problems;

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- \* Will make informed decisions; and
- \* Will take action to resolve their legal problems.

### Program Evaluation Design

MLSA and its partners will conduct an internal evaluation of the JFM project using a non-experimental mixed media approach. MLSA believes that an attempt to obtain a statistically usable sample with test and control groups would be too cost prohibitive for this project. In addition, an experimental model with test and control groups would involve denying assistance to some individuals and providing it to others, which is against the mission of MLSA and the purposes of the JFM project.

The mixed method approach will incorporate formative and summative evaluations, and qualitative and quantitative methods. Formative evaluation will be employed to examine the program's development, and assist in improving its structure and implementation. Summative evaluation will examine whether the project objectives were achieved. Both qualitative and quantitative methods will be employed in combination to assure depth, scope and the dependability of the findings.

Through this evaluation, MLSA will be seeking the answers to the following questions:

- \* Are legal information, resources and referrals provided by JFM members to low and moderate income Montanans successful in accomplishing the articulated outcomes of the project?
- \* Is the project being implemented effectively and in a manner that will enhance the likelihood of producing the desired outcomes for low and moderate income Montanans?

### Data Collection Procedures

The program evaluation design will include the gathering and analysis of data regarding the numbers of people served, and the results of those services. Information will be provided by the member providing the services, and by the recipient of those services. Information will be gathered at the time the services are provided and in a follow up survey. It is anticipated that the survey will be distributed both electronically and in paper form depending on the best method for the particular participant.

Follow-up telephone surveys also may be used.

Prior to implementing the survey, MLSA will test the survey questions to make sure they are appropriate and will elicit the intended information. At this time, it is anticipated that survey questions will include:

- \* As a result of services received from a JFM member, do you understand the legal system better?
- \* As a result of services received by JFM members do you understand whether or not your problem can be solved by the legal system?
- \* As a result of services received from a JFM member, do you understand your rights?

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- \* As a result of services received from a JFM member, do you understand your responsibilities or what you are supposed to do?
- \* As a result of services received from a JFM member, did you make an informed decision about your legal problem?
- \* Are you more confident that you will be able to handle problems like this in the future?
- \* Did a JFM member help you keep the problem from getting worse?
- \* If there was something to do, did you take action to resolve your legal problem?
- \* As a result of the services you received from a JFM member are you better off today?
- \* Do you think that receiving help from a JFM member made a difference in whether or not you had access to the legal system?

These questions will be correlated to the outcomes described above.

MLSA will use the following types of data for this mixed method approach internal evaluation:

- \* Numbers of people served, as collected in MLSA's internal case management system, and partner data collection methods;
- \* Numbers of visits and page views for legal information websites and legal forms websites referred to by JFM members;
- \* Numbers of outreach materials distributed by JFM members;
- \* Information on outcomes for clients and participants receiving services; and
- \* Client Satisfaction and Feedback Surveys
- \* Data gathered from clients at inception of surveys.

MLSA will develop the survey instruments and the data collection procedures for itself and its partner organizations in the JFM project. MLSA will collect data as appropriate in its case management system, Legal Server. MLSA also will use an additional database and excel to tabulate and analyze data from partner organizations regarding services provided.

MLSA had identified the following indicators of success. These indicators assume that 15,000 people received services with a 10% survey response rate (1,500 people total answered the surveys).

### Short-Term Outcomes

1. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they understand the legal system better.
2. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they understand whether or not their problem can be solved by the legal system.

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3. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will know what to do or not do to solve their legal problems.

### Medium-Term Outcomes

1. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they were able to make informed decisions about their legal problems.
2. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they took action (or not) consistent with legal options.

### Long-Term Outcomes

1. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they feel they have increased stability.
2. 1,000 low and moderate income Montanans (approximately 65% of those who respond to the Survey) served will indicate they feel they obtained access to the justice system and the intended benefit of our laws.

### Use of Evaluation Results

Evaluation results will be used for grant reporting purposes and to show the impact of services provided by JFM members on the legal problems of low and moderate income people in Montana. Evaluation results also will be used to improve the services being offered and the operation of the JFM program.

### Amendment Justification

N/A

### Clarification Summary

a. Budget clarification items.

1. Section B - Please confirm the benefits calculation for the Supreme Court Billings Supervisor includes both positions budgeted in Section A.

Response: Yes, the benefits calculation for the Supreme Court Billings Supervisor includes both positions budgeted in Section A. Although we entered the information into eGrants as 2 separate line items, the system combined them.

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2. Section I - Background checks were not budgeted for staff. Please confirm staff will have completed background checks and indicate how the costs will be covered.

Response: All staff will have completed background checks. All current staff involved in Justice for Montanans have completed background checks. The expense for any new staff will be minimal and will be paid directly by MLSA. The MOU between MLSA and its partners requires staff background checks. MLSA reimburses partner sites for the cost of the required checks.

b. Programmatic clarification items:

1. Grant Start Date and Member Enrollment Period: Please review your desired grant award start date and member enrollment period start date in the Applicant Info section of your application. In the Clarification narrative field, please enter a statement confirming the desired grant award start and member enrollment period start. It is not permitted for an applicant to re-submit with an earlier start date than previously submitted.

Response: MLSA confirms the grant start date of September 1, 2014.

c. Strategic Engagement slots Clarification:

1. What percentage of your slots will be targeted to recruiting members with disabilities? What is your program's plan, if any, for outreach and recruitment of members of the disability community?

Response: All 100% of MLSA slots will be targeted toward recruiting members with disabilities, accordingly MLSA does not set aside a certain percentage of slots specifically for the recruitment of members with disabilities. In recruiting for slots, MLSA reaches out to individuals with disabilities and the disability community to search for members to participate as AmeriCorps members.

During the recruitment phase of our program we will reach out to local organizations that provide services to people with disabilities to spread the word about our program. We will also provide information at job and resource fairs as well as veterans outreach events to increase our visibility to potential candidates. Our position descriptions list the tasks performed by individuals on a regular basis and each state: Qualified individuals with disabilities and those from diverse backgrounds are

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strongly encouraged to apply. We provide reasonable accommodations for qualified individuals. Additionally, the Justice for Montanans website has a section devoted to recruiting individuals with disabilities and showcasing how AmeriCorps members with disabilities have served their communities. The website also links to the National Service Inclusion Project which highlights ways for national service programs to create more inclusive programs.

2. In order to increase the number of individuals with disabilities serving as AmeriCorps members, CNCS is offering applicants the opportunity to request additional MSYs to be filled by AmeriCorps members with disabilities. The additional MSYs would be funded at the clarification cost per MSY level. Applicants must describe their intent to recruit, engage and retain additional members with disabilities and provide a detailed outreach plan for how these members will be recruited and supported (e.g. established recruitment partners or strategies.) In addition, programs receiving these additional member positions will be required to report specific details on the success of the recruitment, supervision and retention of AmeriCorps members with disabilities in semi-annual progress reports. If you would like to request additional MSYs to be filled by AmeriCorps members with disabilities, please describe your intent as requested above. Also indicate how many MSYs your program would like to request, the number of slots by slot type, and where the additional members will serve. Add these additional MSYs to your budget.

Response: MLSA is not requesting any additional slots for the recruitment of members with disabilities at this time. MLSA intends to recruit members with disabilities for the slots currently requested and does not have the capacity to support additional members.

d. MSY with no program funds attached Clarification:

Applicants may request No-Cost MSYs. These additional no-cost MSYs are national service positions in which no grant funds will be awarded. In other words, grantees could receive additional AmeriCorps positions but no additional grant funds. Programs will be responsible for using their own or other resources to pay program costs, member support costs and other operating expenses. Keep in mind that full-time AmeriCorps program costs include expenditures for the AmeriCorps living allowance, health care and criminal history checks. Programs are not required to pay living allowances or cover health care for less-than-full-time members.

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If you would like to request No-Cost MSYs, please edit your budget as appropriate (for example, you may need to revise line items for member gear and/or criminal history checks in addition to adding the member positions). Please ensure that your performance measures align with these additional MSY as well. Lastly, you must include a response to each item below in the Clarification narrative field:

Response: MLSA does not have the capacity to support additional no cost MSYs at this time.

e. Healthcare Clarification Items for all applicants:

1. Please provide the name of the health insurance provider you are proposing to use to insure your AmeriCorps members.

Response: The name of the insurance provider is Summit America Insurance Services, a carrier used by the Corps Network Health Plan organization.

2. How did you select the provider? (for example, direct marketing ,through the Health Insurance Marketplace or other means)

Response: The provider was actually chosen by the Corps Network Health Plan organization. As a member of the Corps Network Health Plan organization, we are eligible to obtain coverage under this provider. The Corps Network Health Plan organization, in conjunction with Willis of Seattle, works to ensure all AmeriCorps health coverage requirements are met with the plan furnished by this provider. MLSA worked with a representative from Willis of Seattle to become a member of the Corps Network and this health coverage plan.

3. Does your proposed budget for member healthcare provide for Minimum Essential Coverage (MEC) coverage, as defined by the Affordable Care Act (ACA), for your full-time members?

Response: No, our plan does not provide for the Minimum Essential Coverage as defined by the Affordable Care Act. We have not been able to find a plan that covers both the ACA and the AmeriCorps health coverage requirements. The Corps Network and Willis Company are still trying to find a solution that will cover the requirements of both.

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4. If not, what adjustment to your budget is necessary in order for you to provide Minimum Essential Coverage (MEC)?

Response: At this time, we do not have enough information to know what the cost would be of a plan that would meet both the AmeriCorps requirements and the ACA requirements. We know that a budget adjustment would be necessary and that it would be a substantial increase.

5. If you do not have enough information to answer question (4), please explain why not and/or what prevented you from being able to obtain the necessary information.

Response: In preparing for our current AmeriCorps grant, we spent a significant amount of time researching a plan that would meet both the AmeriCorps and ACA requirements and were unable to find one. At this point, we have no more time to spend trying to find a compliant plan, and are waiting on the Corps Network to see what they can offer.

### Continuation Changes

N/A

### Grant Characteristics