

Executive Summary

The Holistic Legal Assistance Network (HLAN) is an innovative project undertaken in 2013 by Rhode Island Legal Services (RILS) with funding support from the Kresge Foundation. Between August 2014 and April 2015, *The Resource for Great Programs* conducted an outcomes-based evaluation of the first two years of the HLAN Project.¹ In summary:

- Interviews and focus groups conducted for the evaluation revealed that the HLAN project is *creating the template for moving a program from traditional “legal aid” to “holistic legal services.”*
- Analysis of HLAN’s data indicated that *HLAN provides positive outcomes in many more cases than not.*
- 10 case studies flagged *assets* and *challenges* that may serve as drivers of client outcomes, and suggested a *dashboard* for providing real-time feedback to HLAN case managers that potentially can significantly improve the efficiency and effectiveness of their efforts to manage HLAN cases going forward.

The study produced TWO proposals for action based on these findings: (a) incorporation of the tools used in the study into a “dashboard” of information for management of holistic cases; and (b) a further exploration by RILS of the merits of adding two high-level goals to the outcomes HLAN seeks to achieve in its efforts to stabilize the situations of its clients – stability in the environment for children in the household, and stability of the family’s mental health status.

KEY ELEMENTS OF THE HLAN CONCEPT Developed by Rhode Island Legal Services

1. **The “HLAN Project”** - Oversees and coordinates the efforts by the RILS legal specialty units and HLAN partners to address the individual legal and social problems that cause a client to be stuck in poverty.
2. **The HLAN Partners** – Four agencies with missions complementary to HLAN who have entered into formal collaborative agreements to provide their services to HLAN clients in areas such as job training, financial coaching, and housing assistance.
3. **The “HLAN Intake”** – a comprehensive interview of each client, followed by a diagnosis that identifies clients who are experiencing a myriad of interrelated legal and social problems and examines whether or not a clear path to a holistic solution can be found within the capabilities of the HLAN partnership.
4. **The HLAN Information System** – a collection of tools, including both computerized and paper-based elements – that enables the HLAN Unit to track in real time each client’s progress on the key goals that lead to stability and a pathway out of poverty.

¹ The Resource for Great Programs is a national corporation dedicated to providing strategic support to civil justice programs that seek to expand access to justice for low-income people. Details about The Resource may be obtained at www.GreatPrograms.org.

Major Findings of the Assessment

- **The HLAN project is creating the template for moving a program from traditional “LEGAL AID” to a more “HOLISTIC” model.** HLAN is shifting the focus of legal services to “providing what the client needs to get out of poverty.” (Please see the text box at right.)
- **Analysis of HLAN’s data indicated that HLAN provides positive outcomes in many more cases than not.**
- **The 10 cases reveal the importance of a number of assets and challenges that clients bring to a situation that impact the likelihood of success in HLAN’s efforts to help them.** This information potentially will be important as screening criteria for selecting HLAN cases, as well as in flagging the opportunity to bring additional resources to bear for the benefit of HLAN clients through partnerships with agencies that possess expertise and capacities that the existing HLAN network does not yet have.
- **HLAN is having a profound human impact.** A detailed analysis of a sample of 10 HLAN cases demonstrates that a very small, strategic investment in holistic legal and social services can change the lives of clients and their families in ways that likely will last for many years into the future.
- **Especially important is the impact of the HLAN approach on CHILDREN.** The 10 households contained a total of 27 children, 17 of whom at the time of client intake were living in households receiving less than 50 percent of the federal poverty guideline. A vast body of research suggests that the prospects for these children to grow up as healthy, productive adults are dramatically higher if the stability of their environment can be improved. With a relatively small investment, HLAN is having a social and economic ripple effect that likely will benefit these children, their families, and the larger community for decades to come.
- **Keys to the positive results revealed in the 10 cases are the INTEGRATION of legal and non-legal support and the CONTINUITY that HLAN provides in that support.** This allows HLAN to address the underlying causes of a client’s situation rather than just treating symptoms. Taking ownership of improving a client’s total situation rather than simply resolving the immediate problem at hand is a fundamental departure from traditional “legal aid” that the evaluation reveals is working. And the network of non-legal agencies HLAN has recruited as partners dramatically increases the resources available for resolving the inter-twined legal and non-legal issues that many of the low-income people face when they apply to a legal aid program for help.
- **Tools developed for analyzing the 10 cases suggest a DASHBOARD for real-time management of holistic cases.** Graphs of key indicators such as staff time, client contact, and the Stability Index would enable case managers to immediately spot trends in time for a discussion of potential corrective action that might be taken in the case.

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From the interviews and focus groups with HLAN staff and partners:

- *HLAN has allowed us to focus on “what the client needs to get out of poverty.”*
- *“Every client, not just HLAN clients, should be treated holistically.”*
- *“We’ve already changed the way we’re thinking about our work.”*
- *“People are seeing clients and their situations in a different way.”*
- *“It’s a game changer.”*

Action Proposals Derived from the Study

Proposal 1: Put into place a prototype “Dashboard” for managing HLAN cases going forward.

- The Dashboard would ADD a “front end” to existing tools being for tracking and managing the work on HLAN cases, based on tools developed for the evaluation. “Gauges” on the Dashboard potentially could include graphs of client contact, hours spent, and (3) Stability Index measures.
- The Dashboard would support real-time monitoring of key measures such as the CLIENT CONTACT INDEX, allowing corrective action to be taken quickly when obstacles arise – for example, when contact with the client has been lost.
- It would keep focus aimed at what is needed to overcome hurdles that are keeping client from moving steadily toward stability.

Proposal 2: Explore the merits of adding two high-level goals to the outcomes HLAN seeks to achieve in its efforts to stabilize the situations of its clients.

The two goals would be:

- **Stability in the environment for the children in the household.** The case studies suggest that perhaps the greatest opportunity for HLAN is the enormous ripple effect it is having on the children of its clients. By helping 27 children for every 10 of its clients to avoid trauma that otherwise would cripple their prospects for decades to come, HLAN is having a profound impact on poverty with a relatively small investment of resources. Questions suggested from this analysis were:
 - **What kinds of support are the children of legal aid clients receiving** to address their emotional, physical, and educational needs in the face of the crises their families are facing with imminent homelessness, joblessness and other problems?
 - **What resources exist in the community to address these needs?** Are there opportunities, perhaps through formal partnership arrangements with agencies specializing in services for children, to significantly improve not only the immediate, direct outcomes of HLAN’s assistance for its adult clients but also to significantly improve the long-term prospects for the children involved? In short, can HLAN have an even greater long-term impact on poverty than it initially has aspired to by focusing greater attention than it currently does on the situations of the children of its clients?
 - **How can the long-term outcomes of HLAN’s success for children be more fully captured** in the measures currently being applied by the HLAN project, without greatly increasing the burden and cost of data collection for the program?
- **Stability of the family’s mental health status.** Depression, anxiety, and in some cases, addiction, were challenges facing clients that affected efforts being made to help HLAN clients. The analysis of the 10 cases highlighted the importance of mental health issues as barriers to success in many, if not most, HLAN cases, and suggested that HLAN’s prospects for success in raising the housing, income, and family stability for these clients potentially could be greatly enhanced by adding to the HLAN network a formal partner possessing expertise and capacity to provide mental health services to HLAN clients.

The evaluation of HLAN’s first two years indicates that the project is producing positive outcomes for clients in many more cases than not. A detailed analysis of ten case studies flagged assets and challenges in clients’ situations that may serve as drivers of client outcomes, and suggests a “dashboard” of measures that potentially can provide holistic case managers with the real-time feedback they need to navigate a client’s situation toward stability.

HLAN has proven its capacity to transform legal services from traditional “legal aid” to a model that provides the holistic support that clients and their families need to not only resolve their legal problems but to achieve stability in basic areas of housing, income, and family relationships – the situations they must manage in order to get out of poverty.

The evaluation reveals that HLAN is creating the template for such a transition to “holistic legal services.” It suggests that by the end of its first two years, the HLAN project was well on its way to becoming what its founders’ had hoped it would be: “*a game-changer*” for addressing poverty in the low-income communities served by a legal services program.