CALC's Evaluation Frameworks 2015-2019: Tools Used, Lessons Learned & Reflections

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2015: Initial Research

- CALC's JHP project began in February 2015 following an assessment of the legal needs of our community that suggested there could be benefits to partnering with healthcare organizations. The project began with an initial research & development phase looking at the question of whether a medical-legal partnership model could be useful; and if so, how the traditional model of an on-site lawyer could be adapted to fit our particular geography.

Tools Used:

- A steering committee was established with Lisa, Michele, Cathy McCallum and Dr. Ken Palmer

- A Queen's University student prepared a literature review/ annotated bibliography

- We conducted informal key informant interviews with JHP researchers in Australia and legal practitioners involved in the small number of projects in Ontario.

- We conducted informal needs assessment interviews with potential partners

- Partners were asked to enter into MOUs with CALC

- We produced a report of our work and findings

2015: Initial Research

What We Learned

- The needs assessment with the partners was crucially important since it revealed many subtle differences in how the health organizations operated that would have significant implications for how the project was deployed

What We Would Change

- The strategies we used were an effective way to get the project off the ground.

- Now that resources such as the annotated bibliography, MOU, rough needs assessment questions exist, a similar project elsewhere would not likely require as much development time.

January 2016 – April 2017: Pilot

- The JHP officially launched with six partners in January 2016. Our priority was to establish some proof of concept for this project. Specific goals were: 1. Improve access to justice for low-income clients, particularly in rural and remote areas; 2. Support early intervention in, and the prevention of, escalating legal problems, thereby improving clients' overall health and well-being; 3. Support healthcare providers to identify legal issues and refer clients to CALC by providing quality education sessions and producing useful resources and tools; and 4. Reduce the Ontario Disability Support Program (ODSP) appeals burden through better initial applications.

Tools Used:

- The steering committee continued

- We worked with Queen's University nursing students on several sub-projects

- Held a partner meeting in July 2016 to get feedback on project

- We developed a "matrix of intervention" to track intervention timing

- Looking at metrics including total number of referrals, who sent them, rural v urban split, whether we were reaching new clients, the timing of intervention, number of secondary consultations, areas of law, originating primary care setting for ODSP appeals, number of ODSP applications reviewed pre-submission, number of POAs completed

- We distributed pre-and-post workshop evaluation surveys

- At 6 months (June 2016) we produced and distributed a report of our findings

January 2016 – April 2017: Pilot

What We Learned

- None of the goal statements could really be accessed directly. They all required proxy measures

- Evaluation was laborious as many of the metrics we were using had to be manually pulled

- Things were happening that couldn't really be captured by data alone

- Possible consistency or bias issues with timing of intervention, even relying on the "matrix of intervention", since project lead was reviewing and coding these

What We Would Change

- Going forward it would be impossible to continue the same level of data collection and reporting - just too much staff time was required. On top of that a new case management computer program (CIMS) in May 2017 would make it impossible to get even the data we had been able to extract easily from the old system

- We wanted to incorporate qualitative measures

May 2017 – Ongoing: CIMS

- New case management software rolled out in May 2017 and proves to be an ongoing challenge.

Tools Used:

- Limited metrics: number of referrals, originating location for referrals, number of workshops and number of healthcare providers in attendance

What We Learned

- CIMS is an ongoing challenge.

- Legal clinics use CIMS very differently from one another.

What We Would Change

- Since "throw it out the window" sadly isn't an option… we have gradually been able to find some strategies that work. We need to have conversations with other clinics running JHPs about how they are collecting information in CIMS so that eventually stats could be compared

Summer 2017: Partner Survey

- We wanted to get some data on the partner perspective to the project. Specifically we wanted to know – did they feel the project supported them to make referrals? Were they satisfied with learning opportunities and CALC supports? Did the project help to build confidence identifying legal issues? Overall did they feel the JHP was helpful to them, and helpful to their patients?

Tools Used:

- Survey Monkey – anonymous response

- Focus Group – partner meeting in September 2017

What We Learned

- This worked pretty well to get the big picture, gave us the information we were looking for, but some comments were confusing and there was no easy way to follow up since survey was anonymous

- The response rate was decent overall, but with some glitches, for ex one organization did not respond at all

What We Would Change

- Could consider some key informant interviews in addition to the survey

Fall 2017 - Ongoing: Logic Model

- Our efforts to capture the bigger picture of what this project was doing and search for something to help guide our thoughts about evaluation led us to creation of a logic model. It has been revised several times as the project has progressed (most recently Sept 2019)

Tools Used:

- Logic model

What We Learned

- Through creation of the logic model we began to see there was even more going on with this project than we realized.

- We started to feel strongly that we needed to get some dedicated funding in place to work on evaluation frameworks for these kinds of projects– and we needed expert help

- Logic models are useful tools but can be daunting for lawyers (and others!) who've never worked with them before – having one done as a model or working with people who have experience can help

Summer 2019: Mapping Study

- We wanted to better understand the landscape of JHPs in Ontario

Tools Used:

- Survey Monkey

- Key Informant Interviews

What We Learned

- The combination of survey monkey and key informant interviews worked well to give a sense of the number and scope of projects in Ontario

June 2019 – June 2020: LFO Project

- In late 2018 the Law Foundation of Ontario put out a granting call for applications dedicated to evaluation – this seemed the perfect opportunity and just what we'd been looking for to build out our evaluation of the project. We applied and were successful with a project to create evaluation methodologies and resources for justice & health partnerships

Tools Used:

- Interdisciplinary Advisory Committee / learning from each other

- Scoping review

- Key international informant interviews

- US MLP evaluation frameworks review

- Taxonomy of terms

What We Learned & What We Would Change

- Stay tuned!

Other Evaluation Strategies

Tools Used:

- Learning log
- Guided professional journal entries
- Case studies
- Monthly "action plan" reports to our Board
- Yearly internal project reports
- Yearly annual report to the public
- Yearly meeting with all partners, more frequent debriefing with individual partners

What We Learned & What We Would Change

- As the project has developed there has been a sprawl – both in terms of what we are doing and what we are measuring, tracking, evaluating. It may be time for some streamlining.

Reflections & Questions

- Trying to evaluate this project has been an exercise in how much we can do with very scarce resources - in terms of money, knowledge, and time
  - Since CIMS, even collecting basic metrics like "number of referrals" feels unreliable, onerous and unsustainable at times (and we are very resourceful and experienced!)
  - Many legal clinics in Ontario have even fewer resources than CALC – we are seeing the "solution" for some with JHPs is not to do any evaluation.
  - If we are to spread this movement, then question becomes how to get buy-in for these projects, especially around evaluation? How to get data that can be contrasted and compared?

- We have been experimenting with a number of approaches but it's still hard to get at the overall impact of these projects – on access to justice, improved health/well-being