THE FLORIDA BAR FOUNDATION

STRATEGIC RESET METRICS

Prepared by Spark Policy Institute

THE FLORIDA BAR
FOUNDATION
LEADERSHIP AND FUNDING FOR JUSTICE IN FLORIDA

Overview

In June 2017, The Florida Bar Foundation adopted its Strategic Reset (hereinafter referred to as "Strategic Reset" or "Reset").[1] The Reset represents a significant change in the Foundation's traditional business model, elevating its role as a strategic leader and catalyst for increased access to justice for all. In July 2018, the Foundation hired Spark Policy Institute to develop assessment metrics and mechanisms to help the Foundation measure the impact of the Strategic Reset.

Process for Developing the Metrics

Spark Policy Institute worked with executive and program-level staff of The Florida Bar Foundation and three members of the Strategic Reset Committee to develop the evaluation framework and metrics in late 2018. The iterative metrics development processes included a day-long planning session in July, monthly web-based feedback meetings, and a presentation to the Board in December 2018.

Outline of this Report

This report is divided into three sections. We begin by presenting the evaluation framework, which guided the development of the metrics. Second, we present metrics which align with the Reset's Theory of Change. Finally, we offer some reflections and recommendations on next steps.

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[1]For more information, please see: https://thefloridabarfoundation.org/what-we-do/strategic-reset/

Section 1: Evaluation Framework

Spark developed this Evaluation Framework to guide development of the metrics. The Framework includes three key components:

1 the scope and aims of the Strategic Reset, including the Reset theory of change;

2 the primary ways in which the metrics will be used; and

3 other key considerations in developing the metrics.

By grounding the development of the metrics in these foundational elements, we sought to ensure that they provide information that is useful, credible, and aligned with the Reset's ongoing work.
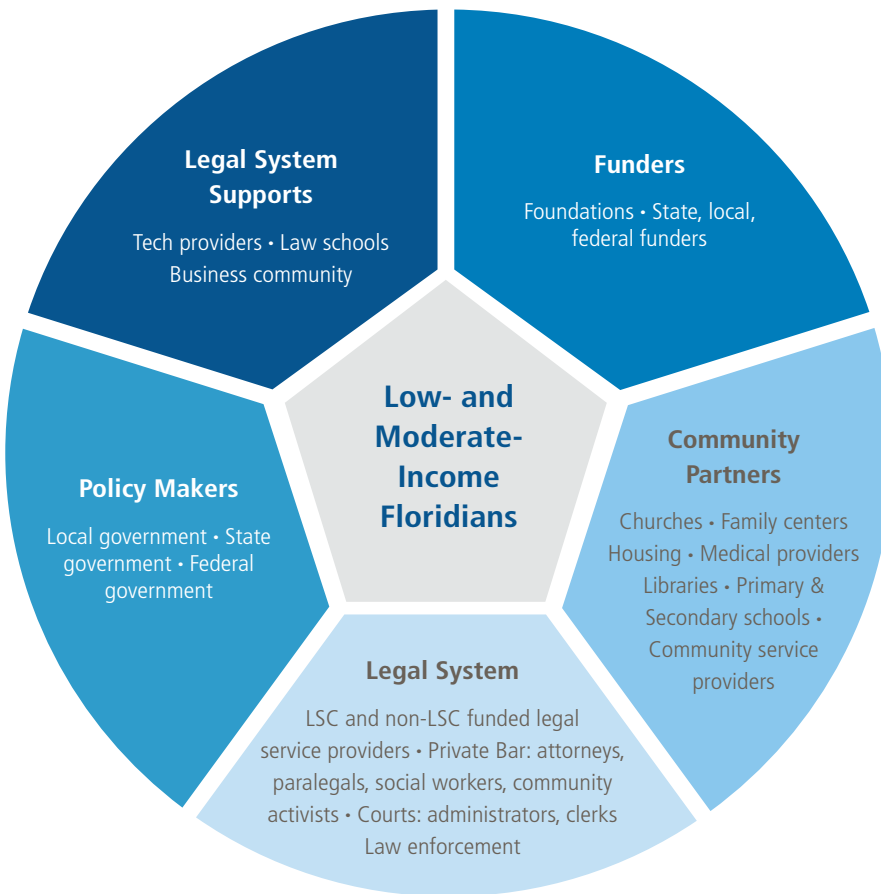
Scope and Aims of the Strategic Reset

TAKING A SYSTEM APPROACH

In Florida, many low- and moderate-income individuals (the poor and working poor) have unmet, and sometimes unidentified, civil legal problems with housing, immigration, family relationships, and other fundamental needs. They lack the avenues to be meaningfully heard, to protect their rights and to have their problems resolved, creating a civil justice gap.

The civil justice gap is the result of societal problems in access, effectiveness, and efficiency in the justice system. The Florida Bar Foundation has, and will continue to, address the justice gap by working with partners in the legal aid delivery system (Figure 1). The Foundation recognizes that providing funding for direct services alone will never be enough to close the gap. The Strategic Reset aims to close this gap by increasing access to justice, be it through direct services, impact advocacy, or education, to ultimately ensure that individuals receive due process and have their civil legal needs met.

The Reset takes a system-focused approach, which means it aims to influence the individuals and organizations outlined in the figure below to change the conditions that are holding the civil justice gap in place. Importantly, the Reset complements the Foundation's mission: to provide greater access to justice in Florida.

The System the Strategic Reset Aims to Influence

Legal System Supports
Tech providers · Law schools
Business community

Funders
Foundations · State, local,
federal funders

Policy Makers
Local government · State
government · Federal
government

Low- and Moderate-Income Floridians

Community Partners
Churches · Family centers
Housing · Medical providers
Libraries · Primary &
Secondary schools ·
Community service
providers

Legal System
LSC and non-LSC funded legal
service providers · Private Bar: attorneys,
paralegals, social workers, community
activists · Courts: administrators, clerks
Law enforcement

STRATEGIC RESET STRATEGIES AND ANTICIPATED OUTCOMES

The Strategic Reset is not a reset of the Foundation's mission. The Foundation's three-fold mission remains intact: (1) expand and improve representation and advocacy on behalf of low-income persons in civil legal matters; (2) improve the fair and effective administration of justice; and (3) promote public service among lawyers by making it an integral component of the law school experience. The Reset does not directly affect funding of Legal Aid Summer Fellows, Law School Civil Legal Clinics, or Equal Justice Works Fellows, and other established programs.

The Reset is organized around four primary strategies: (1) expanding access to direct legal services; (2) building a network of supportive services; (3) innovating and building the capacity of civil legal aid providers to increase the effectiveness and efficiency of legal services; and (4) educating and activating community members to increase self-efficacy. These strategies include an emphasis on both increasing access to legal services (direct services and complementary support) as well as helping to make the system more effective and efficient.

If these strategies are successful, over time they will lead to increased partnerships and collaboration; shifts in issue framing and changes in norms; improved knowledge among community members; and systemic changes that increase access to, as well as the effectiveness and efficiency of, legal services. Ultimately, the impact of the Reset will be that individuals have increased access to civil justice and have their civil legal needs met, with or without litigation. The figure on the next page provides additional details for each of these components.

The grant-funded initiatives and internal work that the Foundation has identified as being part of the Strategic Reset are outlined in Appendix A. To understand the impact or "added value" of the Reset, it is important to ensure that metrics focus on these components of the work.

The Florida Bar Foundation's Strategic Reset: Theory of Change

STRATEGIES

Expand access to direct legal services with emphasis on qualitative and meaningful results for more people
- Provide grants for direct legal support
- Build relationships with the private bar to advance practices/policies that support provision of pro bono
- Create processes and tools that support civil pro bono work
- Build relationships and advocate for sustainable funding sources for direct legal services
- Build the capacity of grantees to obtain funding

Build a network of supportive services
- Foster relationship among foundation, state and local service providers and community resources to build a network of non-traditional services and support
- Strengthen the Foundation's relationships with grantees, other legal aid organizations and community service providers to better understand community need and opportunities for support
- Encourage and fund competitive grants that foster collaboration

Innovate and build the capacity of legal aid providers to increase the effectiveness and efficiency of direct and supportive services
- Fund competitive grants to innovate and address community need
- Support technological changes to streamline service delivery
- Increase access to legal delivery tools, resource materials, and trainings
- Identify and support the adoption of promising and best practices by legal aid providers

Educate and activate community members to address unmet needs
- Foster relationship with grassroots organizations working with Floridians in need of legal services
- Provide funding to legal aid and other service providers to educate and support clients to better address legal problems

EARLY CHANGES

Enhanced partnerships and collaborations
- Increased partnership between the Foundation, law schools, the private bar, legal aid organizations, and other justice system entities
- Increased communication among civil legal aid funders
- Improved strength and quality of relationships among legal aid entities and community partners (e.g., grants are proposed in collaboration)
- Increase in partners looking to the Foundation as a resource (increased credibility)
- Increased sense of inclusion among grantees in the Foundation's processes

EARLY CHANGES

Shifts in issue framing
- Increased awareness of the importance of civil legal aid among decision-makers, funders and private attorneys
- Increase in community partners seeking legal aid as a resource
- Increased awareness of the importance of the Reset as a system-change strategy by grantees, decision-makers, funders and other system actors

Increased exploration of shifts in practice among legal aid providers
- Increased awareness of community need and assets among legal aid providers
- Increase in legal aid providers using and accessing peer knowledge and shared resources
- Increase in exploration of new and potentially promising practices by legal aid clinics and community service providers

SYSTEM CHANGES

Institutionalized partnerships
- Systems established that support knowledge sharing among legal aid and community service providers (e.g., training bank)
- Formalized partnerships between legal aid providers and community partners (e.g., agreement to share client data)
- Established shared metrics across legal aid funders
- Aligned practices across three technology partners are formalized

Changes in norms
- Private attorneys see the value of pro bono work
- Funders, legal aid and community service providers and those providing pro bono see themselves as a part of "one system"
- The system has adopted a "client first" shared vision

System and structures that promote effective and efficient practice among legal aid and community service providers
- Increased adoption of shared standards of practice among legal aid providers
- Increased replication and scaling of projects
- Structures and processes that help community members to identify and elevate their legal needs (e.g., legal aid attorney embedded in a community housing organization)

Institutionalized strategies to increase access to legal services
- Increased philanthropic and state funding for legal aid
- Increased number of firms with a policy outlining an offset of billables for pro bono hours
- Rules have changed for pro bono hours to count for continuing legal education credits

IMPACT

Individual-Level
- Increased access to civil justice through both direct legal services and complementary support
- Civil legal needs are met (with or without litigation)

System-Level
- Increased system capacity to meet direct legal needs
- Increased system effectiveness and efficiency

Ways the Metrics Will be Used

The Strategic Reset's metrics can be used in two primary ways: (1) as a performance management tool - for example, as a "dashboard" to routinely examine overall progress across the portfolio of the Reset's internal and external investments; and (2) as an evaluative tool – for example, to conduct a "deep" investigation into a particular element of the Reset, such as shifts in the landscape of pro bono practices and outcomes or investments in and the adoption of technology.

Broadly, the metrics aim to answer three primary evaluation questions:

- **Long-Term Impact.** What is the impact of the Reset on access to civil justice, through direct legal services and complementary support?

- **Short-Term Outcomes.** What changes is the Reset fostering at the individual and organizational level (among legal aid organizations, community service providers, funders, community members, etc.)?

- **Strategy Implementation.** How is the Reset being implemented (types of entities supported, activities conducted, people reached, etc.)?

The metrics aim to ensure accountability, to facilitate improvement (internally), and to develop learnings for the field.

ENSURE ACCOUNTABILITY

The Florida Bar Foundation is responsible for reporting on the implementation and impact of the Strategic Reset to a variety of audiences, including The Florida Bar, the Florida Supreme Court, and members of Florida's legal community. The Foundation needs to determine whether the Reset is allocating funding in ways that support its mission. Metrics will, therefore, need to illustrate the impact and effectiveness of the Reset in ways that resonate with these stakeholders, including being believable and credible.

FACILITATE IMPROVEMENT

The Strategic Reset represents a shift in the way The Florida Bar Foundation structures its work internally and awards funding. Results will be used by Foundation staff to support and improve funding decisions, refine strategies and approaches, and make decisions that can help inform the work after the five-year "pilot" of the Reset. In turn, metrics need to provide data that can be used by Foundation staff to inform strategic decisions. They will need to accurately provide the "full story" of the work occurring and include a focus on context to ensure staff can interpret their meaning.

DEVELOP AND SHARE LEARNINGS

The Strategic Reset provides an opportunity for local grantees and partners as well as external audiences, such as other states and funders, to learn about a new model. The metrics should provide information that is useful for grantees: for example, to help them improve their work and leverage funds. The metrics should also provide opportunities for other states and funders to learn from the work occurring in Florida and help them leverage further funding for legal aid.

Other Key Considerations

EVALUATING A SYSTEM APPROACH

Evaluating a system approach like the Strategic Reset is a complex challenge. Unlike program- or service-focused evaluations, in which it is often straightforward to measure the number of people served, system evaluations need to employ a range of metrics to fully capture the impact of the system strategies. System evaluations also frequently include a greater focus on context, and aim to provide information that can support adaptation and strategic decision-making.

METRICS REFLECT VALUES

By outlining the dimensions by which a Reset will judge progress, metrics explicitly and implicitly communicate to grantees, Foundation staff, and external partners what the Reset feels is important. They communicate the Reset's goals and aims. Because those participating in the Reset want to perform "well" on the metrics, they will shift their focus — reflecting the notion of "what gets measured gets done."

Metrics can provide a lot of value in ensuring accountability, informing strategy, and sharing promising practices. However, metrics can also have unintended consequences. Metrics can impose a large burden on those who need to collect, analyze, and report on them (such as grantees and Foundation staff) and potentially create inefficiencies, decrease cooperation/sense of partnership and foster reporting of low-quality information. Metrics can also unintentionally impact the system in negative ways, for example, limiting discretion and causing undesirable shifts in behavior or focus.

To the extent possible, it is important to anticipate potential unintended consequences upfront by choosing metrics that reflect the "root issues" of the system and encourage positive shifts in practice. It is important to think about how those who will be reporting on the metrics will respond. Likewise, it is critical to continue to investigate the impact of metrics over time.

Example of the Unintended Consequences of Metrics

Recent metrics to judge the performance of health systems emphasize feedback from patients on their experience. In some cases, patients rate hospitals poorly because they receive low quality food. Because hospitals want to receive high scores (to receive high reimbursement rates), they work to improve the quality of food – but is that the best way to improve the quality of patient care?

Summary: Process Used to Prioritize Metrics

In summary, to prioritize metrics we used the following criteria:

- **Relevant.** Metrics had to be grounded in the work of the Reset to accurately capture the work being done.
- **Aligned.** Metrics had to align with the evaluation questions and be useful for accountability, strategy refinement, and external learning.
- **Intentional.** Metrics had to reflect the types of changes the initiative aims to foster, avoid potentially negative unintended consequences, and prevent unnecessary burden.

Section 2: Proposed Metrics

We propose the following metrics. These metrics represent a starting place to answer the evaluation questions, and may need to be revised or expanded over time. The metrics are not listed in an order of priority, but instead are intended as a general overview. For details on each metric, see the table on pages 11-18.

Metric	Rationale
1. Number and types of organizations being financially supported.	This metric will help the Foundation track what types of organizations are being supported and the extent to which funding aligns with the Reset's strategies.
2. Amount of funding leveraged.	This metric will help the Foundation track the amount of funding leveraged by grantees.
3. Number and ways in which people are trained.	One of the goals of the Reset is to build organizational capacity. This metric will help the Foundation understand who and how people are being trained by the Foundation or its grantees.
4. Number and types of materials developed and shared.	One of the goals of the Reset is to build organizational capacity. This metric will help the Foundation to understand how they are supporting the field.
5. Number and types of innovative models supported, including pro bono.	One of the goals of the Reset is to increase the effectiveness and efficiency of services. This metric will help the Foundation understand the models that are being developed to catalyze increased access to justice.
6. Number and percent of grantees, legal aid providers, and pro bono providers adopting best practices or shared standards of practice.	One of the goals of the Reset is to support adoption of best and shared standards of practice. This metric will allow the Foundation to understand how key players are changing their practices. Data can also be used to inform funding decisions.
7. Number of clients using self-help resources or accessing low-cost representation.	This metric will help the Foundation understand the ways in which it and its partners are educating and activating community members to address unmet needs.
8. Number and types of new partnerships.	Creating, promoting, enhancing, and institutionalizing partnerships can help expand the system's capacity. This metric will help the Foundation understand the number and types of partners that are part of, or who are joining, the "system."
9. Economic benefits received by clients.	This metric provides a quantitative means of measuring the social impact of this work. The definition of "economic benefits" is clear, consistent, and transparent to help ensure that it is viewed as credible.
10. Total number and types of individuals who receive or benefit from civil legal support.	This metric will help the Foundation understand the number and types of people being reached or helped in some manner. The Foundation can examine the "value add of" specific efforts (e.g., grant approaches). Describing the different types of individuals served helps enhance transparency and credibility.
11. Actions and reactions of key stakeholders on the Strategic Reset.	This metric will keep the Foundation apprised of comments and reactions from all stakeholders in the legal aid delivery system relating to acceptance and implementation of, accountability for, compliance with, and collaboration on the Strategic Reset.

Metrics Details

Metric	Components/Definition	Relationship to Theory of Change	Potential Method/ Data Source

1. Number and types of organizations being financially supported.	Will be broken down by:
	
	• Whether they are a previous or new grantee
	
	• The type of grant they receive (grant program)
	
	• The volume of funding they receive
	  – Total dollars awarded by FBF
	  – Total dollars awarded by FBF as a percent of the total budget of the organization
	
	• Region/ geographic area of focus
	
	• Type of organization
	
	• Focus areas, for example:
	  – Direct representation
	  – Maximizing the impact and effectiveness of civil legal assistance, including technology
	  – System change and innovation
		Strategy	This information can be collected and reported annually from FBF grantee agreements and Self-Assessment Reporting (SAR).
			
			• FBF grantee agreements and records indicate whether an organization previously received funding.
			
			• The SAR currently contains: (1) a funding code that identifies grant type; (2) a question on "sources of funding for legal services and related activities", which will give information on both dollars awarded by FBF as well as dollars from other sources; and (3) geographic allocation of services.
			
			• FBF will need to determine how to classify the focus area of each grant, in terms of its alignment with the Reset priorities. The Theory of Change provides a potential starting place.

2. Amount of funding leveraged.	Total dollars that are directly matched for FBF-funded projects. This will provide a ratio of how much external money is being leveraged for every dollar that FBF awards.
	
	• Matched dollars will include the following:
	  – Any money that grantees are awarded from external sources or internal resources that grantees commit to a project specifically to fulfill matching requirements for an FBF grant.
	  – When the FBF grant is used as the "match" to fulfill a requirement for a different grant, the funding counted would be the external grant that is made possible due to the FBF matching money.
	
	• Matched dollars will be broken down by grant program.
		Strategy	Grantees can include information on matching funds and other funds secured to support grant activities in their annual SARs. This would be a new reporting category. FBF should consider creating a standard template so that all grantees are reporting this information in the same way.

Metric	Components/Definition	Relationship	Potential Method/ Data Source
2. Amount of funding leveraged.	Total dollars that the organization obtains in relation to FBF-funded projects (not necessarily funds matched directly on FBF grants). • Will include the total on the amount of funding secured by grantees to support grant-related projects, including funds secured outside of matching requirements (e.g., funds secured in subsequent project years). This will show how FBF dollars contribute to larger sustainability of grant related efforts.	**Strategy**	Grantees can include information on matching funds and other funds secured to support grant activities in their annual SARs. This would be a new reporting category. FBF should consider creating a standard template so that all grantees are reporting this information in the same way.

3. Number and ways in which people are trained.	Number and types of training/educational opportunities offered or supported by FBF.
	
	• Will be broken down by topic, including: leadership and supervision; diversity; non-profit management; grant writing; community education/engagement; or other
	
	• Will be broken down by training method: in person; webinar; or other
	
	• Will be broken down by whether CLE credit was awarded
	
	Number of attendees.
	
	• Will be broken down by type of individual trained:
	
	  – Legal aid providers vs. pro bono attorneys
	
	  – Students vs. practicing attorneys
		Strategy	Data can be collected by FBF (for FBF-offered events) and reported by grantees using a standardized template, modeled after the existing template for pro bono training on the SAR.

Metric	Components/Definition	Relationship	Potential Method/ Data Source

4. Number and types of materials developed and shared.	Number and types of materials developed and shared by FBF. Will be broken down by:
	
	• Type of materials, including: reports, online tools/platforms, news releases, or other
	
	• Focus area
	
	   – Direct representation
	
	   – Maximizing the impact and effectiveness of civil legal assistance, including technology
	
	   – Systems change and innovation
	
	   – Other
	
	Number of people who receive the materials
	
	• For information actively shared: number of people who receive the material
	
	• For information passively shared: number of people who access the material
		Strategy	FBF can use an internal tracking sheet to record the number and types of materials developed. This tracking sheet could include the following:
			
			• Title
			
			• Type
			
			• Focus area
			
			• Who developed
			
			• Audience
			
			• Means of sharing
			
			The number of people receiving the materials can be tracked by email lists, attendees at events where materials are shared, and website analytics.

5. Number and types of innovative models supported, including pro bono.	Number and types of innovative models proposed and developed by grantees: • Number of grantees proposing innovation-related projects • Number of grantees meeting all or most of the measurable innovation-related outcomes defined on their grantee agreement • Number of grantees creating a model framework of best practices to share with others Will be broken down by types of innovative programs, products and approaches: • Uses of new technology (hardware, software, web-based) • Changes in decision-making structure • Inclusion of non-traditional (i.e., non-legal) actors in the process • Change in the type of options available to clients	**Strategy**	Grantees submit annual reports in which they indicate whether they have: (1) achieved their outcomes, and (2) developed a model framework to add to FBF's library of best practices.

Metric	Components/Definition	Relationship	Potential Method/ Data Source
6. Number and percent of grantees, legal aid providers, and pro bono providers adopting best practices and/or shared standards of practice.	Adoption of aligned practices • Number and types of shared practices/systems (e.g., procurement, technological) adopted by legal aid organizations Adoption of pro bono best practices • Number of pro bono providers adhering to the best practices laid out in the pro bono benchmarks self-assessment guide • Number of cases posted on Florida Pro Bono Matters site • Number of attorneys submitting an interest form through the Florida Pro Bono Matters site Adoption of other best practices • Number of organizations accessing and adopting one of the best practices shared by the FBF in the best practices' library • Will be broken down by type of practice and type of organization Extent to which grantees are evaluating their work • Number and percent of grantees who have evaluated their program's impact or effectiveness	**Systems Change**	The FBF can track the extent to which funded legal aid organizations are adopting shared standards of practice, for example, through an annual survey or brief interviews. The number of organizations adopting a best practice from the library can be tracked via downloads (and a brief follow-up survey) linked to the best practice library. The number of pro bono providers using the self-assessment guide will report their results directly to the Pro Bono Program Officer. Data on use of Florida Pro Bono Matters can be collected from the site administrator. The extent to which grantees are evaluating their work can be added as a component of the SAR.
7. Number of clients using self-help resources or accessing low-cost representation.	Number of clients using self-help legal resources • Number of questions that were answered on Florida Free Legal Answers • Site visits and materials downloaded from Florida Legal Access Gateway • Number of individuals using Florida Name Change website Number of clients using grantee-specific resources, self-help resources Number of intake appointments at legal aid services organizations	**Early Change**	Website metrics can be captured via Google Analytics or a similar service. Number of clients using grantee-specific resources can be added as a component of the SAR. Information on intake appointments can be reported by legal aid providers.

Metric	Components/Definition	Relationship	Potential Method/ Data Source
8. Number of new partnerships.	Number of organizations partnering with the FBF (state-level partnerships) • Broken down by type of partner, such as: – Legal services organization; other non-profit; government agency; other foundations/funders; or other Number of grants proposed collaboratively between multiple organizations • Broken down by type of grant • Broken down by type of partner • Broken down by whether this represents a "new" collaboration Number of organizations participating in or partnering with the FBF grantees (local-level partnerships) • Broken down geographically (by circuit) • Broken down by type of partner	**Early Change** **Systems Change**	Annually, FBF can enumerate all organizations that it considers to be partners according to a standard list of criteria, such as: • Organizations that attend FBF events • Organizations that allocate time/ money toward one of FBF's initiatives • Organizations FBF has a MOU with • Organizations FBF regularly communicates with The number of grants proposed collaboratively can be tracked by the grants program officer. To gather information on grantee partners, FBF can ask each grantee to provide a list of organizations that meet the same criteria it uses to designate its partners.
9. Economic benefits received by clients.	Number of clients receiving benefits, average financial awards, and total of awards secured for clients by staff and pro bono attorneys. Will be broken down according to benefit categories. An example that FBF could use comes from Virginia's legal aid programs, which collect and report two categories of financial outcomes data: • Direct dollar benefits for clients. These are for "affirmative dollar awards" to clients. Affirmative benefits are reported for the amounts of "lump sum awards/settlements" and "monthly benefits." Specific financial benefits categories include "Social Security/SSI," "Child Support," and "Affirmative consumer judgments." See the full list of the affirmative dollar award categories. • Dollar savings for clients. These outcomes are for "amount of dollar savings achieved for clients through judgments or payments avoided," such as "Defensive Consumer Law Matters" (e.g., bankruptcy, garnishment). See the full list of the affirmative dollar award categories. As this metric is tracked over time, results need to be contextualized in terms of total FBF funding.	**Impact**	This is reported annually by grantees on the SAR in the Direct Dollar Benefit to Clients section. If FBF wishes to adopt a standard reporting template, as seen in the example from Virginia, the SAR would need to be revised to incorporate such a template.

Metric	Components/Definition	Relationship	Potential Method/ Data Source

10. Total number and types of individuals who receive or benefit from civil legal support.	This metric will be broken down by the type of support received from a particular grant or type of grant. For instance:
	
	 • Total number of individuals who benefitted from the Community Economic Development Initiative such as:
	
	   – Number of individuals who retained affordable housing despite eviction proceedings or other tenant issues;
	
	   – Number of individuals obtaining affordable housing units with help from grantees or legal aid providers;
	
	   – Number of employment opportunities created; and
	
	   – Number of individuals benefiting from initiatives focused on economic justice
	
	 • Total number and types of individuals who were served due to a grant under the Transformation and Innovation Initiative; and/or
	
	 • Total number of individuals who were served by or through any other grant provided or administered by FBF, including community-based civil service legal grants.
	
	 The metric will also be broken down by actual type of support received. For instance,
	
	 • Total number and types of persons provided with direct legal services
	
	   – By funded legal aid providers
	
	   – By pro bono attorneys
	
	   – By others
	
	 • Total number and types of persons who benefitted from FBF grants
	
	   – By funded legal aid providers
	
	   – By pro bono attorneys
	
	   – By others
		Impact	Each grantee can report this total number of individuals served annually on the SAR. While some of this is already being reported, it is not being captured in a standardized way across all grantees. FBF can develop a standard rubric for how to count the total number of individuals served as well as indirect beneficiaries.
			
			 To measure use of electronic and technology-aided resources, FBF can use website analytics.

Metric	Components/Definition	Relationship	Potential Method/ Data Source

10. Total number and types of individuals who receive or benefit from civil legal support.	• Some individual characteristics to be tracked include:
	
	  – Race
	  – Ethnicity
	  – Gender
	  – Gender identity and orientation
	  – Age
	  – Veteran status
	  – Employment status
	
	  – Disability (mental and physical)
	  – Rural/Urban Location
	  – Incarcerated Status
	  – Income/Earnings
	  – Dependency status
	  – Citizenship status
	
	• Total number of individuals who benefitted from community lawyering[2]
	
	  – Number who attended educational sessions / received educational materials
	  – Number who attended programs for prevention services
	  – Number of individuals served by medical/legal partnerships, who are not otherwise counted as receiving direct representation
	  – Number of individuals receiving assistance through locally-based clinics (e.g., "Law for All," "Promise Zone")
	
	• Number of individuals who benefitted from impact litigation
	
	  – Members of a class in a class-action lawsuit
	  – Number of individuals reached by a policy change
	
	• Total number of individuals who benefitted from FBF-supported electronic and technology-aided resources
	
	  – Number of individuals using Florida Legal Access Gateway to access legal information and resources
	  – Number of individuals using floridanamechange.org
		Impact	Each grantee can report this total number of individuals served annually on the SAR. While some of this is already being reported, it is not being captured in a standardized way across all grantees. FBF can develop a standard rubric for how to count the total number of individuals served as well as indirect beneficiaries.
			
			To measure use of electronic and technology-aided resources, FBF can use website analytics.

[2]The Sargent Shriver National Center on Poverty Law defines community lawyering as the "process through which advocates contribute their legal knowledge and skills to support initiatives that are identified by the community and enhance the community's power." povertylaw.org/clearinghouse/collections/community

Metric	Components/Definition	Relationship	Potential Method/ Data Source
10. Total number and types of individuals who receive or benefit from civil legal support.	This metric will capture those receiving direct support (noted above) as well as those receiving indirect support (tracked separately): • Total number and type of individuals indirectly benefiting from direct legal services – Total members of the beneficiary household • As this metric is tracked over time, results need to be contextualized in terms of total FBF funding and in terms of need.	**Impact**	Each grantee can report this total number of individuals served annually on the SAR. While some of this is already being reported, it is not being captured in a standardized way across all grantees. FBF can develop a standard rubric for how to count the total number of individuals served as well as indirect beneficiaries. To measure use of electronic and technology-aided resources, FBF can use website analytics.
11. Action and Reaction of key stakeholders on the Strategic Reset.	Mean and median assessing: • Understanding of the Strategic Reset as a viable strategy; • Acceptance of the Strategic Reset as a viable strategy; • Assessment of the implementation of the Strategic Reset; • Compliance with Strategic Reset guidelines and requirements; • Accountability and collaboration by and amongst key stakeholders regarding Reset's objectives.	**Strategy**	FBF can collect this information through a periodically administered survey tool using a combination of Likert-scale ratings and open-ended response questions.

Note on Assessment Tools and Process

A systematic review of all tools will need to occur to ensure consistency with the selected metrics; some additional tools will need to be created to support the collection of metrics. Additional refinement of focus areas and characteristics needs to occur before finalizing tools.

The addition of metric 11 will require the development of a survey tool focused on the Reset. Consideration will need to be given as to whether this tool is stand-alone or incorporated into intended feedback loops for the whole strategy of FBF.

Section 3: Recommendations and Reflection on Next Steps

The selected metrics represent a starting point for measuring the Strategic Reset. During the discussion and development of the metrics, several future steps were identified in addition to the review and development of tools.

- Gathering of data to establish a baseline understanding on the selected metrics needs to occur. This baseline understanding can be used to establish performance targets on each of the selected metrics. It is recommended that FBF finalize this process within the next six months.
- FBF is in the process of conducting a statewide needs assessment. This assessment could offer further clarification on categorical reporting for these metrics and additional context for performance targets.
- The decision to focus the metrics exclusively on the Strategic Reset means that these metrics do not likely tell the full story of FBF's total impact on the system. There are likely additional metrics needed to fully inform FBF of its total impact.

Appendix A. Crosswalk: Florida Bar Foundation Strategic Reset Work & Theory of Change Strategies

Strategic Reset: Line of Work	Theory of Change: Strategy			
	Expand access to direct legal services with emphasis on qualitative and meaningful results for more people	Build a network of supportive services	Innovate and build capacity	Educate and activate the community
Grant-Funded Initiatives				
Community Economic Development Initiative	X	X	X	X
Pro Bono Transformation and Innovation Initiative	X	X	X	X
Internal Work				
Develop tools and build relationships to advance pro bono and increase civil legal aid outreach	X	X	X	X
Build relationships and advocate for sustainable funding sources for direct legal services	X			X
Foster relationships among foundation, state and local service providers, and community resources to maximize impact, avoid redundancies, share best practices, and increase collaboration		X		X
Support technological changes to streamline service delivery	X		X	
Increase access to legal delivery tools, resource materials, and training		X	X	X