



PROJECT SCOPE: CLEAR Assessment

A. SUMMARY

The Office of Civil Legal Aid seeks a contractor to conduct an assessment of Northwest Justice Project’s CLEAR intake, advice, and referral system. OCLA’s overall goal is to support the creation of a more accessible intake and referral system that is aligned with the needs of the client populations it serves and with the current access to justice landscape in Washington. This assessment should result in a set of specific recommendations directed at how the utilization of existing CLEAR resources and future investments into CLEAR could be deployed to increase client access.

B. WASHINGTON STATE OFFICE OF CIVIL LEGAL AID

The Washington State Legislature determined that the provision of civil legal aid services to indigent persons is an important component of the state’s responsibility to provide for the proper and effective administration of justice. The **mission** of the Office of Civil Legal Aid (OCLA) is to secure, invest and oversee the use of public funding for civil legal aid to low-income people in Washington State and to ensure accountability for public funds dedicated to this purpose. Pursuant to RCW 2.53.030, OCLA contracts with Northwest Justice Project (NJP) to provide publicly funded legal services across Washington State in accordance with the statutory mandates. Each year NJP provides critical civil legal assistance and representation to thousands of low-income people in cases affecting basic human needs such as family safety and security, housing preservation, protection of income, access to health care, education and other basic needs. As part of the provision of services, NJP operates CLEAR (Coordinated Legal Education, Advice and Referral) to provide legal intake, referral, and advice across the state.

C. CLEAR

CLEAR is an intake, advice, and referral system for low-income people with civil legal issues. NJP’s CLEAR system was originally created to serve as the principal point of entry into the statewide legal aid system for low-income residents in all counties of the state with the exception the most populous county, King County. CLEAR services include free legal help, including advice, education, limited legal services, self-help materials and, where available, referrals for further representation by NJP attorneys or by partner organizations in the civil legal aid delivery system.

Originally structured as a toll-free legal hotline, CLEAR currently operates as a hybrid system, including a substantial “online intake” system and several other access pathways in addition to the telephone hotline. This is operationalized through two separate but coordinated units at NJP: the Screening Unit, comprising intake professionals providing eligibility screenings, and CLEAR which houses the staff attorneys providing advice and brief services.¹

D. PROBLEM STATEMENT

The landscape of civil legal services has shifted significantly since CLEAR’s inception in 1996 while staffing for CLEAR has largely remained stagnant. Increased client demand, a more diverse civil legal aid provider network,

¹ For purposes of this scoping document, “CLEAR” refers to both units working together.

and changing technology result in CLEAR providing services to less than 15% of all contacts.² The significance of these access constraints means that, for most individuals seeking assistance through the hotline, CLEAR cannot perform its original intended purpose of serving as the centralized access and referral point for legal aid across Washington State. As legal providers have multiplied and expanded other intake mechanisms, CLEAR has embraced the concept of “coordinated” over “centralized” intake, but external statewide messaging still directs prospective clients to CLEAR for legal help despite the known access challenges.

The expert staff and leadership at NJP/CLEAR have responded to feedback about access over time and have made significant internal changes which have improved client experience and added alternative pathways to intake. Despite these changes, access bottlenecks continue to exist, and the additional intake pathways have contributed to the overextension of existing resources at CLEAR. As a result, both client communities and partnering service providers have reduced their reliance on CLEAR as an intake and referral service and are hesitant to refer prospective clients in need of advice.

The ability of CLEAR to act as a central statewide access point, and whether that remains a priority of the legal aid delivery system is increasingly in question given the high volume of client need and diverse landscape of legal aid providers. At the same time, the resources and expertise that are currently invested in CLEAR can and do serve individuals well when they are able to access the CLEAR intake system. Before committing to scaling CLEAR’s resources to meet the need or to redeploying resources in whole or in part, the Washington State civil legal aid delivery system needs to determine if and how CLEAR could be better leveraged to create meaningful access to the civil legal aid delivery system for the client community in the current landscape.

E. SCOPE OF SERVICES

OCLA is seeking a contractor to conduct an assessment of how CLEAR’s current operations and resource deployment align with its intended function as the primary access point to the civil legal aid delivery system. More specifically, OCLA is seeking an assessment of how CLEAR is coordinating with other intake systems across the delivery system, what clients and delivery system providers need from CLEAR to meaningfully improve client access to legal aid services, and how the resources of CLEAR could be best leveraged to meaningfully improve client access and be most responsive to consumer needs. OCLA anticipates that this assessment will have multiple phases, with the results of each phase informing the scope of the following phase(s):

1. Phase 1: Assessment of CLEAR from a client and civil legal aid delivery partner perspective
 - a. Completed by Spring 2025: Specific date TBD by OCLA and contractor
 - b. This phase will focus on working with CLEAR’s external partners, other legal aid providers in the delivery system, and clients or potential clients to gain their perspectives on access to civil legal aid in Washington and envisioning the ideal utilization of statewide intake, advice, and referral

² Based on the current data available, between 1/1/2024 and 6/30/2024 CLEAR received 102,554 individual calls (some portion of which are understood to be repeat callers). Of those, 4,521 were queued and 2,969 were answered. In the same period, 10,496 online applications were started, resulting in approximately 900 accepted cases, 700 referred to external partners, and 2,800 rejected for legal aid and instead referred to resources for individuals over 200% FPL. This data is qualified by the fact that CLEAR leadership does not have confidence in the accuracy of CLEAR’s current data collection platform. To ensure accuracy of reporting and accountability to any efforts to implement significant changes, CLEAR needs access to accurate and efficient data collection resources.

services. After a thorough assessment, the contractor will report findings, from both a client and partnering provider perspective, on (1) how intake to the civil legal aid system is happening currently, (2) what is needed to make the entry into the civil legal aid delivery system more accessible, (3) visions for a statewide resource even if outside the limits of the current framework.

- c. Prior to initiation of external partner communication, Contractor shall engage in limited discovery to ensure base level knowledge of CLEAR and the NJP Screening Unit operations and services.
2. Phase 2: Assessment of current CLEAR operations
 - a. Completed by Summer 2025: Specific date TBD by OCLA and contractor
 - b. This phase will focus on assessing CLEARs internal operations and utilization of resources within the context of CLEAR's design as a primary entry point for WA's civil legal aid delivery system. After a thorough assessment, the contractor will make specific recommendations on:
 - i. the strategic role of centralized intake, advice, and referral services as a component of statewide intake systems,
 - ii. how to better align CLEAR's resources and operations with the findings established in phase 1.

F. DESIRED OUTCOMES

Specific recommendations could be made on following areas of inquiry but may also include any other areas the contractor feels are necessary in consideration of the assessment findings:

- a. Understanding the needs and preferences of client communities related to access/intake and how CLEAR and the WA provider network can be most responsive to those needs.
- b. How to improve access for individuals with disabilities and/or other barriers who may need alternative access points.
- c. Internal CLEAR system improvements to increase access: screening, triage, and use of attorney resources
- d. How CLEAR or a similar coordinated effort might be effectively expanded to serve King County.
- e. If coordinated entry best meets statewide needs and goals, how it can be best operationalized between delivery system partners
- f. How the messaging about and branding of CLEAR can be in alignment with current operations and service offerings
- g. What baseline metrics are necessary and appropriate for future assessment of access