Project Plan

for

Centralized Intake/Hotline TIG

Version 1.0 draft 2

Prepared by Melanie Barker, Esq.

Florida Rural Legal Services Inc.

January 28, 2016

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Revision History

Name	Date	Reason for Changes	Version
Melanie Barker	1/22/16	initial draft	1.0 draft 1
Melanie Barker	1/28/16	2nd Draft	1.1 draft 2

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1. Overview

The focus of this project is to transform our current intake system into a centralized intake system that allows for increased uniformity, increased productivity, and better client focus throughout the program. The success of the program will be measured on client satisfaction surveys and data review.

1.1. Project Purpose, Objectives, and Success Criteria

Purpose:
The purpose of this project is to increase efficiency and productivity, to make our system more client focused, and to create uniformity throughout the various offices in our program.

Objectives:

1. Increase the number of clients we are serving
2. Create uniformity throughout each of the offices within our program in regards to how clients are screened and served.
3. Make it easier for clients to obtain services who live in more remote parts of our service area.
4. Decrease expenses on paper and other office supplies.
5. Allow advocates more time to do more substantial work for those clients who need more extensive services.

Success Criteria:

1. An increase in the numbers of calls being taken by the program.
2. An increase in the number of clients being screened.
3. An increase in the number of clients being served.

1.2. Project Deliverables

Deliverable	Recipients	Delivery Date	Delivery Method	Comments
Centralized Intake/Hotline Hardware/Software	Staff Members	By March 31, 2016	Installed by contractors	
Centralized Intake Online	Clients	By April 4, 2016	N/A	
Hotline	Clients	By October1, 2016	N/A	

1.3. Assumptions, Dependencies, and Constraints

This plan timeline/dates are dependent upon getting the technology purchased in time for us to begin our process. It depends on whether we will need board approval for larger purchases and how long it will take to get approval from LSC.

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1.4. References

Technology initiative Grant Program: http://www.lsc.gov/grants-grantee-resources/our-grant-programs/tig

TIG Evaluation Plans: http://www.lsc.gov/grants-grantee-resources/grantee-guidance/reporting-requirements/tig-reporting/tig-evaluation-plans

1.5. Definitions and Acronyms

TIG: Technology Initiative Grant Program

Intake Specialists: The staff members who will be answering the phone in the centralized intake system.

Hotline Advocates: Staff Members who will be providing counsel and advice over the phone to clients whose cases fall in the hotline priority.

Centralized Intake: It is a mechanism that allows the public a single point of entry into the Florida Rural Legal Services phone system and access to legal assistance.

Hotline: It is a legal advice phone system whereby clients are able to speak with an advocate who can provide them counsel and advice regarding a legal issue and provide possible referrals.

1.6. Evolution of the Plan

This Plan will be reviewed on a biweekly basis and adjusted as we go forward.

2. Project Organization

2.1. External Interfaces

LSC who is funding the program will be reviewing our milestones and providing funding as we meet certain milestones.

Z Consulting: This company is our consultant on finding appropriate vendors to bid on equipment within the program.

Toyota Production System Support Center, Inc. (TSSC): They will be evaluating our intake procedures after we implement the centralized intake system. Currently, that evaluation will begin during the last week of April.

Ilenia Sánchez-Bryson is being hired as an outside consultant to help the Project Manager with implementing the plan, creating documents, etc.

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2.2. Internal Structure

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                        │ Board of Directors │
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                        │  TIG Committee   │
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                        │ Project Manager  │
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         │ TIG Tech  │   │Consultants│   │ TIG Staff │
         │   Lead    │   │           │   │ Committee │
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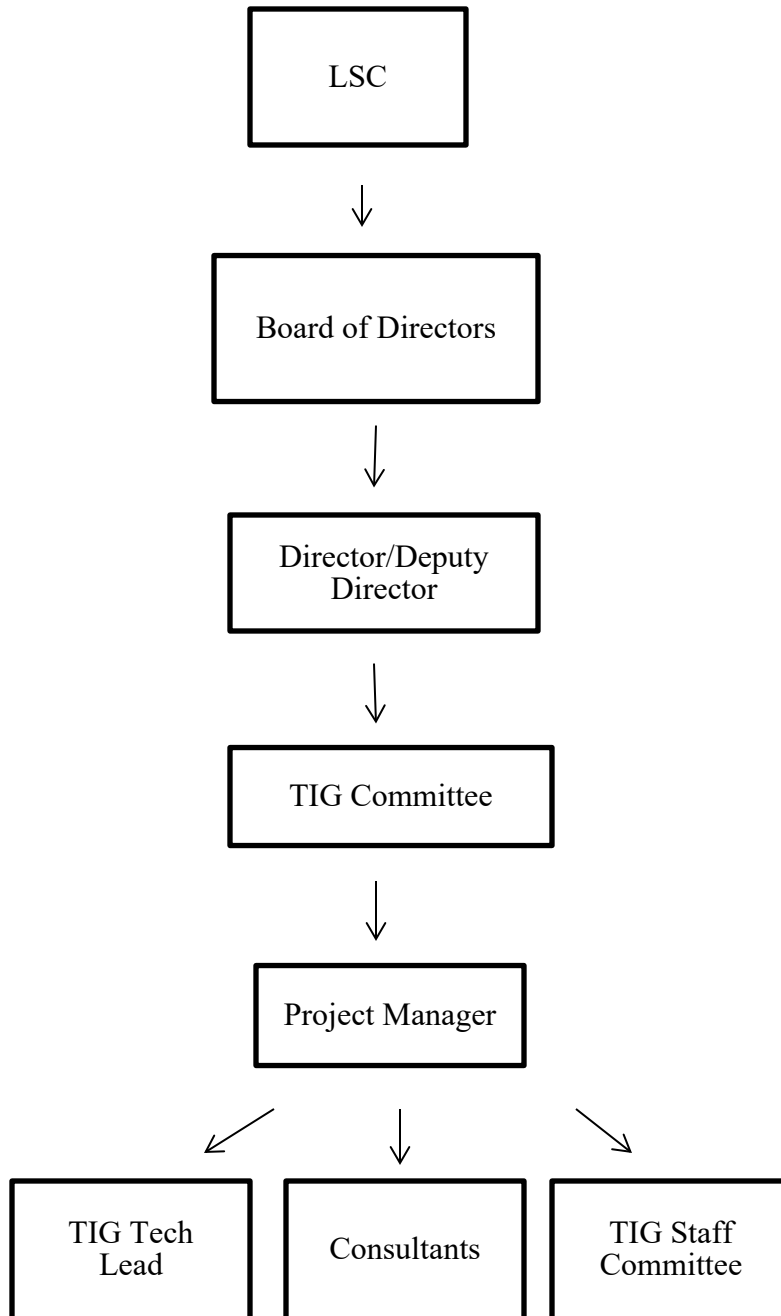
2.3. Roles and Responsibilities

- Project Manager: Melanie Barker
- Technical Lead: Rudy Chagoya
- Other TIG Committee Members: Wanda Dutcher, Amy Burns, Don Isaac.
- Staff TIG Committee: Maria Karlberg, Monica Bello, Laura Castro, Angela Thompson, Maria Garcia, Sara Mangan, Evelyn Palencia, James Zink,

3. Managerial Process Plans

3.1. Start-Up Plans

3.1.1 Estimation Plan

Currently, it is estimated that the Centralized Intake portion of the project will be operational by April 1, 2016. The Advice Hotline will be operational by October 1, 2016.

Cost estimates can be found in the TIG Application which includes the budget for the project. (Exhibit A).

3.1.2 Staffing Plan

Currently, the Project Manager is assigned at 50% of her time and the Tech Lead is assigned to the project using 25% of his time per week. As the project moves forward, it is anticipated that the Project Manager will eventually spend 100% of her time on the project.

Intake Specialists: Currently there are 4 Full-Time Intake Specialists. After the project begins implementation, we anticipate needing at least 2 more intake specialists.

Intake Specialist/Hotline Manager: After this project is fully implemented and vetted we will need to hire a full-time manager for the Centralized Intake and Hotline. While the Project is being reviewed after implementation, the Project Manager will be acting as Manager until full-time manager is hired.

Hotline Advocates: Once the hotline is operational, we anticipate beginning with 2 Full-time Attorneys for the Hotline. With the assumption, that the number of calls that will go to the hotline will increase, that number of advocates will eventually need to increase and/or be supplemented by Office Advocates.

3.1.3 Staff Training Plan

The Project Manager will need to be trained on Shoretel operations including programing, installation, and how to manage the system.

The Project Manager

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Intake Specialist will need to be retrained on new procedures once they are developed. Once TCSC does its evaluation, further training will probably need to be done.

Hotline Advocates will need to be trained on the procedures for the hotline.

All staff members will need to be trained on call handling procedures including centralized intake, hotline calls, etc. Depending on call volume, non-dedicated intake specialists/hotline advocates will need to be able to use the system.

3.1.4 Resource Acquisition Plan

Currently, we are working with Z Consulting who should be getting us a list of potential vendors to provide the equipment and software that will be required for our project.

Acquisitions of equipment will be reviewed by the Project Manager with advisement by the TIG Technical Lead. We will present the options to the TIG Committee and seek input from the TIG Staff Committee

3.1.5 Project Commitments

1. Create a more uniform intake system.
   a. rewrite the intake questions in legal server to reflect what needs to be asked.
   b. create a Wiki to allow all Intake Specialists access to all possible grants, eligibility, and referral resources.
   c. Rewrite the intake manual/guidebook
   d. Implement a phone system that will allow any intake specialist from any office to screen a potential client.
   e. Hire Additional Personnel.

2. Implement a Counsel and Advice Hotline
   a. rewrite the case handling manual
   b. determine what cases will go to the hotline.
   c. Create pamphlets, letters, and other material to provide to clients who are served on the hotline.
   d. Hire additional personnel.

3.2. Work Plan

The Project Manager will be in charge of making sure that all deadlines are met and that all individual sub-projects are done on time and per the plan.

The Project is being split into two phases. The first phase will be the implementation of the centralized intake system. The second phase will be the implementation of the advice hotline.

The Project Manager will submit any changes needing to be made to milestones, provide a point of contact for LSC, submit requests for disbursements of funds, and maintain data for the project.

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Phase 1: Centralized Intake

Preliminary Work:

1. Obtain the services of a Consultant to evaluate hardware/software needs, research vendors, solicit proposals, and help FRLS in making final decisions to allow the implementation of centralized intake and an advice hotline. (This task was completed when we hired Z-Consulting).

2. Provide all documents/data/ information that the Consultant will need to ascertain what Technology upgrades and new technology we will need. (This take was already completed).

3. The TIG committee will need to research any issues with text messaging and possibly regulations.

Creation of Policy and Procedures:

1. The Project Manager will need to create a final call flow chart/process. (This task has already been started). She will work with the outside consultants to finalize the process.

2. The Project Manager will need to create universal policies and procedures for centralized intake. She will work with the consultants, staff members, administration, and others to collaborate so that it fits within our program's scheme.

3. The Project Manager with the Technical lead will need to create the phone enterprise architectural scheme.

4. Administration will need to determine and create a policy of what cases will need to have physical files, which will not, and who will be responsible for the creation of physical files in each office.

Purchase and Installation of Software/hardware and Upgrades to Current Systems:

1. The Technical Lead with the assistance of Z consulting will purchase appropriate hardware and software for the system. Before purchases are made, the TIG Committee will review with final approval from Administration.

2. The Project Manager will need to update and make changes to legal server to reflect uniformity and make the process more efficient for users and allow us to capture necessary information. She will work with the consultants, administration, and others to collaborate so that it fits within our program's scheme.

3. The Technical Lead and the Project Manager will need to work with Z consulting and vendors to have all equipment installed to upgrade the systems. This includes upgrades

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to the Shoretel phone system, Internet Fax System, texting capabilities, and other items needed as determined by the Technical Lead and Z Consulting.

4. Technical Lead, Project Manager and other appropriate staff members will need to work on reprograming the phone system to create a centralized intake phone system.

5. The Project Manager with the assistance of the Technical Lead will create a centralized website where all information that Intake Specialists, Advocates, and other Staff Members will need to have in order to serve clients throughout the entire service area. The information will include grants, grant qualifications, information about each circuit, courthouse information, referral sources, etc.

Training:

1. Training will need to be provided to the TIG Committee on the new phone system, legal server, and other software changes made to implement the project.

2. The Project Manager will need to oversee the training of the Intake Specialists.

Outreach/Staff Involvement:

1. The Project Manager will need to work with Administration to reach out and involve the FRLS staff in the project via the Staff Committee, program wide conference calls, emailed newsletters etc. The Project Manager will be in charge of making sure that staff is informed of the changes and the plan throughout the process.

Hiring/Allocation of Staff to Centralized Intake:

1. The Project Manager along with Administration will need to write job descriptions for the intake specialists and possibly change job descriptions for other staff members in conjunction with the Union representing Staff.

2. Administration, Project Manager, and office management will need to reallocate/hire staff members to the centralized intake line.

Implement the Centralized Intake:

1. Implementation of the centralized intake system by the Technical Lead and Project manager.

Review and evaluation of Centralized Intake:

1. The Project Manager will need to monitor the Centralized Intake system during the evaluation phase of the project.

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2. The Project Manager will work with Toyota to evaluate the new centralized intake system by answering questions and providing any all items they may need.

3. The Project Manager will need to create some sort of client evaluation.

4. Implement any changes suggested by Toyota.

Phase 2: Legal Advice Hotline

Rewriting the Case Handling Manual:

1. The Project manager with the assistance of the TIG Committee and Administration will rewrite the case handling manual to reflect a hotline that includes deciding which cases will go to the hotline and what will get screened.

Creation of Materials:

1. The Project Manager will oversee the creation of email friendly/mail friendly educational materials to provide to clients.

2. The Project Manager will oversee the creation of template letters that can be customized to provide individual advice to clients.

Hiring/Allocating Staff

1. The Project Manager along with Administration will need to write job descriptions for the Hotline Advocates and possibly change job descriptions for other staff members in conjunction with the Union representing Staff.

2. The Project Manager along with Management and Administration will reallocate/hire advocates for the hotline.

Reprogramming phone system/Implementing Software Solutions and Upgrades for Hotline:

1. The Technical Lead and the Project Manager will be responsible for reprogramming the phone system for the hotline.

2. The Technical Lead will need to oversee the installation of any software upgrades or new software to implement the hotline.

3. Create a usable data base of editable letters for Hotline Advocates to use

Implementation:

1. Implement the Hotline.

Monitoring/Evaluation

1. The Project Manager will monitor the hotline during the evaluation phase of the project.

2. The Project Manager will be responsible for collecting data for evaluation.

Final Reporting for Entire Project/Closing Out Project

Final Report and Evaluation

1. The Project Manager will prepare the final report and evaluation report to LSC.

2. The Project Manager will prepare the final Budget.

Hiring Permanent Manager for Centralized Intake/Hotline

1. Administration will be responsible for hiring a permanent centralized intake/hotline manager.

3.3. Control Plan

3.3.1 Data Control Plan
- We have the baseline number of phone calls being handled by each office by reviewing the phone system.
- We will use the phone technology to review the number of phone calls being handled through the new system.
- Using Legal Server, we will review how many clients are screened vs. how many are accepted for some sort of service.
- Using Legal Server, we will review under the new system how many clients are screened vs. how many are accepted for some sort of service.
- The Technical Lead and the IT department will be in charge of providing the data reports on a "to be determined basis."
- All data provided to outside vendors/funders will be redacted to remove any client identifying information.

3.3.2 Requirements Control Plan
All Changes to the Plan/Project will need to be reviewed by LSC and will be presented to the LSC representative as those changes are proposed by the Project Manager.

3.3.3 Schedule Control Plan

See Task List (Exhibit B).

3.3.4 Budget Control Plan
It is the responsibly of the TIG Committee members to make sure that their time is correctly imputed into Legal Server. It is the responsibility of the Project Manager to make

sure that expenditures are within our line item budget and if outside the budget to seek approval from LSC and/or the FRLS Board of Directors.

3.3.5 Communication, Tracking, and Reporting Plan

Type of Communication	Communication Schedule	Typical Communication Mechanism	Who Initiates	Recipient
Status Report	every 2 weeks	team meeting	Project Manager	TIG Committee
Project Review	monthly	Team meeting	Project Manager	TIG Committee
Risk Mitigation Status	as mitigation actions are completed	email	Wanda Dutcher	Project Manager
Requirement Changes	as changes are approved	email	Project Manager	TIG Committee
Supplier Management Review	at project life cycle gates	N/A	Project manager	TIG Committee

3.3.6 Metrics Collection Plan

Data will be provided by the IT Department and will be maintained by the TIG Committee and specifically the Project Manager for use in reporting.

3.4. Risk Management Plan

The timeline promised to LSC is much longer than what we anticipate it taking, hopefully eliminating in risk of delays that could affect our funding.

Contingency Planning will be done by the TIG Committee if we come across an issue that is outside of the parameters of what is expected.

Risks will be tracked by looking at data, reviewing reports provided by consultants. At our monthly meetings, we will look at the plan to make sure that we are not encountering issues that could endanger the project.

3.5. Issue Resolution Plan

All issues that come up during the project will be brought before the TIG Committee who will decide whether the issue rises to the level of needing to notify LSC and/or the Board of Directors.

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3.6. Project Close-Out Plan

A final report and final budget will be produced after evaluation of data after implementation. Both the final report and the final budget will be provided to LSC.